

CONCUR TRAVEL – USEFUL WEB SITES & CONTACT INFORMATION

All IEG employees who have an OU travel credit card should bookmark and add all of the following web sites to your favorites your computer. It's easier to have them saved on your computer instead of having to remember where each one is located each time they are needed.

concurolutions.com **CONCUR Solutions home page.**

Bookmark your personal home page in Concur. You will use this site *often* to:

- Prepare and make changes as needed to your personal Concur Profile page.
- Prepare, submit and monitor the approval status of your advance Travel Requests for *all* travel outside of Oklahoma,
- Possibly book your U.S. Domestic airfare from within Concur (airfare travel to multiple meeting locations within the US and/or international travel outside the US cannot be done within Concur),
- Monitor your OU Travel Card charges,
- Prepare an Expense Report for ALL trip expenditures, including OU travel card charges and expenses that are to be reimbursed directly to the traveller (in-state, US domestic and international).
- Attach pdf copies to the Expense Report of any receipt(s) that you personally paid for that were not charged to your OU travel credit card
- Import your OU travel card charges *and attach pdf copies* of the invoices/receipts for those expenses to the Expense Report
- Submit your Expense Report for approval
- Monitor the approval process of your Expense Report
- Monitor the payment status of your Expense Report
- Print/save a copy of your final approved Expense Report for your records.

IMPORTANT NOTE: You do not have to wait until the trip is finished to start importing OU travel card charges and/or attaching expenses that you personally paid for yourself to the Expense Report!!! After the Travel Request has been fully approved and the “Expense” button appears in the far right column of your approved Travel Request, you can start attaching and/or importing travel expenses to the request. Make sure you have a pdf copy of each receipt already saved to your computer before you do this. Attaching as many of the travel expenses to the trip Expense Report will dramatically decrease the number of Concur system notifications for “Unassigned” invoices and make the expense reimbursement process much faster when the trip has concluded. Just save the expense report as you go along, but don't submit it until you are ready to submit the final expense report after the trip has ended.

gsa.gov/portal/content/104877 **Federal per diem rates for within the United States**

If you need to know maximum allowable federal rate for nightly lodging and/or daily per diem rates for the **US city** that you will be staying in, this site can be a useful in determining what rates to use to prepare the estimated expenses for the Travel Request that must be prepared in advance of the trip.

The Concur system should automatically calculate the per diem rate for the city/state that you will be traveling to once you enter the city and state. If it does not, this site is a useful reference.

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https://aoprals.state.gov/web920/per_diem.asp **Foreign per diem rates outside the US**

If you need to know maximum allowable federal rate for nightly lodging and/or daily per diem rates for the **Foreign city** that you will be staying in, this site can be a useful in determining what rates to use to prepare the estimated expenses for the Travel Request that must be prepared in advance of the trip.

The Concur system should automatically calculate the per diem rate for the city/province/country that you will be traveling to once you that information in the travel request. However, if it does not, this site is a useful reference when preparing the required advance Travel Request estimates.

www.oanda.converter/classic **Foreign currency converter web site**

The Concur web site should automatically calculate the foreign currency rate into US dollars for you. However, if you need to estimate per diem costs for purposes of preparing the required advance Travel Request, this site can help you determine the US equivalent dollar amount for foreign currencies.

ou.edu/controller/fss/procedures.html **OU Travel Guidelines (very useful information!!!)**

This site gives instructions to the OLD, obsolete method of preparing travel claim reimbursements when a single Excel worksheet was used to reimburse travel expenses after the trip was finished. So, some of the information given does not apply at all to the new Concur travel system implemented in February 2016. *However, it is the only OU Financial Services web site currently available that has clear guidelines concerning State and Federal regulations governing the following:*

- Air Fare
- Lodging
- Per Diem
- Rental Cars
- Miscellaneous Travel

It is strongly, strongly recommended that any OU employee with and OU travel card become very familiar with this web page and refer to it often if you have questions about whether an expense is allowable, what you need to do if for special circumstances regarding air fare, lodging, per diem, rental cars, and other miscellaneous travel.

Concur@ou.edu **Email contact for Concur Solutions Team at OU's Financial Services Department on OU's main campus at Evans Hall.**

If you have any problems with preparing or submitting your Travel Requests and/or Expense Reports for travel in Concur, send a detailed email directly to the Concur Solutions Team with a description of the error message(s) you are receiving and/or problem you are experiencing and ask for instructions on how to resolve the issue. (For example, "I am trying to prepare a Travel Request for a trip to city/state on these dates and I am getting this error message that won't allow me to go to the next step and/or submit my request. How can I correct this problem?"). Be sure to state if you are a post doc, GRA, etc. in the email.

Phone number for OU Concur Solutions Team: 325-4023

If you feel you have an urgent need to talk to a staff member at OU's Financial Services department about a Concur problem you are experiencing, you can try calling this number. They rarely answer since Concur travel was launched, but it may be worth a try.