#

**Concur Travel Guide for MSU Extension**

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**For More Concur Training Materials:**

See the [Travel module](https://d2l.msu.edu/d2l/home/628679) in the D2L Employee Essentials Course

-or-

Visit the [MSU Travel](http://www.ctlr.msu.edu/COTravelNew/default.aspx) Webpage

# **In-State Expense Reports: Submitting In-State Mileage using the Travel Log**

*These instructions are for those who wish to enter mileage from their travel log into Concur themselves, instead of relying on the transaction assistants to enter it in Concur. Watch the video first, and then use the directions below as a quick reference.*

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| Play, Start, Video, Film, Arrow, Media, Multimedia | [Submitting Mileage using the Travel Log](https://mediaspace.msu.edu/media/Concur%2B-Completing%2Bthe%2BTravel%2BLog/1_98qxgmkv)  |

## **Step 1: Filling out and Saving the Travel Log**

*The travel log first needs to be completed and saved as a PDF. Make sure you are using the most recent version, available on the* [*OD Business Office Travel*](https://www.canr.msu.edu/od/business_office/travel) *page.*

1. In the *Mileage Expenses* tab, fill out your mileage. Don’t forget to scroll over and include a business purpose on each row.
2. In the *Travel Expenses* tab, you can add other expenses like parking, tolls, or, if overnight status, lodging and meals.
3. In the *Total Costs* tab, select the Calculate button to calculate your costs. It will break it down by account.
4. Save it as a PDF by going to *File > Save as Adobe PDF.* Make sure all of the tabs are moved over into Sheets in PDF. Select *Fit Worksheet to a single page.* Select *Convert to PDF.* Save it using a file naming convention that includes your dates of travel.

## **Step 2: Adding your Travel Log into Concur**

*The below processes assume you have already completed your travel log and saved it as a .PDF.*

1. **Log into SAP Concur through EBS.**
2. **Find your blanket authorization to tie it to the Expense.**
* Go to *Requests.*
* Find the request, and click on the *Expense* link to the right of your blanket authorization request.

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| **NOTE**: Requests that have been approved will move to “Approved Requests” after **90 days**. They will no longer be visible as “Active Requests.” |

1. **Update the information in the Expense Report Header**
* Select *Report Details> Report Header*.
* Update the:
	+ Name (include time period you traveled), start and end date, trip purpose, indicate if there were shared expenses, account.
	+ Save.
1. **Add Personal Car Mileage Expenses**
* Click on *Add Expense*. Find or search for the category “Personal Car Mileage” then select it.
* In the New Expenses screen, add:
	+ 1. *Transaction date* as your last day of travel.
		2. *Additional information*: note “Travel Log.”
		3. *From location* is your home office.
		4. *To location* is “various”
		5. In *Comments*, add “This is a travel log saved as a PDF.”
1. **Attach your Travel Log**
* Select *Show Receipt* and then *Add Receipt* then *Upload Receipt Image* (unless you already added it another way).
* Find your travel log as a PDF and upload it.
* Update the *Distance field* to include your total amount of travel; the total mileage in the travel log.
* It automatically calculates the amount based on that distance.
* Select *Save Expense*.
1. **Allocate your Travel to Different Accounts (if needed)**
* Select the line for your personal care mileage using the left checkbox and select *Allocate.*
* You will see your default allocation. Use the *Add* button to add new accounts.
* Use your travel log to fill out the amounts that are allocated to each account.
* Select *Save.*
* If needed, use the *Add Expense* button to add agenda attachments or other receipts.
* Select *Save Expense.*
* Select *Submit Report.*

# **In-State Expense Travel Expense Reports:Submitting Mileage WITHOUT the Travel Log**

*These instructions are for those who wish to enter mileage directly into Concur themselves, without using the travel log and instead of relying on the transaction assistants to enter it in Concur. Watch the video first, and then use the directions below as a quick reference.*

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| Play, Start, Video, Film, Arrow, Media, Multimedia | [Submit Mileage WITHOUT Travel Log](https://mediaspace.msu.edu/media/Concur%2B-%2BEntering%2Byour%2Bown%2BMileage/1_9l56ihzn) |

*If you do not have a lot of in-state mileage on your travel log, it may be easier to directly submit the mileage in Concur, and not use the Travel Log.*

1. **Find your blanket authorization to tie it to the Expense.**
* Go to *Requests.*
* Find the request, and click on the *Expense* link to the right of your blanket authorization request.

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| **NOTE**: Requests that have been approved will move to “Approved Requests” after **90 days**. They will no longer be visible as “Active Requests.” |

1. **Update the information in the Expense Report Header**
* Select *Report Details> Report Header*.
* Update the:
	+ Name (include time period you traveled), start and end date, trip purpose, indicate if there were shared expenses, account.
	+ Save.
1. **Add Personal Car Mileage Expenses**
* Click on *Add Expense*. Find or search for the category “Personal Car Mileage” then select it.
* In the New Expenses screen, select the *Mileage Calculator.*
* Use the Mileage Calculator to calculate your mileage. Select the *Make Round Trip* link at the top if needed. You may also drag the route to adjust it. Select *Add Mileage to Expense* at the bottom.
* Fill in the rest of the trip details:
	+ 1. *Transaction date* as your day of travel.
		2. *Additional information*: add your travel purpose.
		3. In *Comments* you can add more information if needed.
		4. Select *Allocate* and enter the account this trip will be charged to by selecting *Add* and then typing in the account information. You can also split the trip’s cost between two accounts if needed here.
	+ Select *Save.*
	+ Select *Save Expense.*
1. **Repeat step three for any additional trips**
2. **Add Other Expenses (if needed)**
* Use the Add Expense button to add any meeting agendas, parking or toll fees, etc.
1. **Select *Submit Report***

# **In-State Expense Reports: Submitting In-State Travel Logs that Include an Overnight Stay**

*These instructions are for those who wish to enter mileage and a hotel stay from their travel log into Concur themselves, instead of relying on the transaction assistants to enter it in Concur. Watch the video first, and then use the directions below as a quick reference.*

|  |  |
| --- | --- |
| Play, Start, Video, Film, Arrow, Media, Multimedia | [Submit In-state Mileage with Hotel](https://mediaspace.msu.edu/media/Concur%2B-%2BSubmitting%2BMonthly%2BIn-State%2BMileage%2Bwith%2BHotel/1_ui8oj42n) |

## **Step 1: Adding your Travel Log into Concur**

*The below process assume you have already completed your travel log and saved it as a .PDF.*

1. **Find your blanket authorization to tie it to the Expense.**
* Go to *Requests.*
* Find the request, and click on the *Expense* link to the right of your blanket authorization request.

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| **NOTE**: Requests that have been approved will move to “Approved Requests” after **90 days**. They will no longer be visible as “Active Requests.” |

1. **Update the information in the Expense Report Header**
* Select *Report Details> Report Header*.
* Update the:
	+ Name (include time period you traveled), start and end date, trip purpose, indicate if there were shared expenses, account.
	+ Save.
1. **Add Personal Car Mileage Expenses**
* Click on *Add Expense*. Find or search for the category “Personal Car Mileage” then select it.
* In the New Expenses screen, add:
	+ 1. *Transaction date* as your last day of travel.
		2. *Additional information* should include the note “Travel Log.”
		3. *From location* is your home office (or your home if leaving from home is less mileage).
		4. *To location* is “various”
		5. In *Comments*, add “This is a travel log saved as a PDF” and your total mileage from the log.
1. **Attach your Travel Log**
* Select *Show Receipt* and then *Add Receipt* then *Upload Receipt Image* (unless you already added it another way).
* Find your receipt as a PDF and upload it. *Save Expense*.

## **Step 2: Adding Expenses Related to an (In-state) Hotel Stay**

1. **Add a travel allowance**
* Select *Report Details* and then *Manage Travel Allowance.*
* Select *Create New Itinerary.*
1. **Add details under *New Itinerary Stop (right portion of screen)***
* This will be the information detailing when you left for your overnight stay.
* Fill out all fields. Times do not need to be precise.
* Select *Save.*
1. **Fill out the next stop**
* This will be the information where you went to next from this overnight stay: your home office or, if you had a series of overnight stays in different place, the next place you went.
* Fill out all fields. Times do not need to be precise.
* Select *Save.*
* Either add in your next overnight stop or select *Next*.
1. **Enter in Expenses from your overnight stay(s): Meals**
* Select *Expenses and Adjustments* at the top (you can also just click *Next*)
* The system auto-calculates your per diems for each day based on location. For first and last day of travel, it is calculated at 75%.
* In the screen with your meals, select any meals that were provided and thus would be excluded from the expense report.
* Select *Create Expenses.*
1. **Enter in Expenses from your overnight stay(s): Hotel**
* Select *Add Expense.*
* Search for then select *Hotel.*
* Fill in Details: Dates, Vendor (search for and type in if it isn’t in list), Amount.
* Select *Attach* and navigate to and upload your receipts.
1. **Breakdown Hotel receipt charges**
* Select *Add Expense.*
* Search for *Hotel* in the search bar then select it.
* Add the details: Check-in and check-out dates, Transaction date (date you paid), Vendor (you can add if it isn’t in there), City of Purchase, Amount.
* Attach the hotel receipt.
* Select *Itemizations.*
* Select *Create Itemization.*
* Search for *Hotel Type.*
* Break down your room rate and taxes from your receipt.
* If the rate was different each night, you would select “Not the Same.”
* *Save Itemization.*
* *Save Expense.*
1. **Add agendas if you have one, or reason for your stay.**
* Search for *Agenda* in the text box (or other appropriate documentation).
* Select the expense type, select *Upload Receipt*, and then attach the document.
1. **Allocate Your Expenses** (only needed if everything is not going to your default account)
* Select the expenses your allocation relates to using the check boxes on the left.
* Select *Allocate.*
* Allocate by percent or amount in the *Allocate screen*, using the *Add* button to add different accounts and the amount to be charged to each.
* Save when you are finished.
1. **Submit your Report**
* Select *Submit* Report.

# **Travel Requests: Submitting Request for Out-of-State Travel**

*Watch the video first, and then use the directions below as a quick reference.*

|  |  |
| --- | --- |
| Play, Start, Video, Film, Arrow, Media, Multimedia | [Requests for Out-of-State Travel](https://mediaspace.msu.edu/media/t/1_0y4hsdfu) |

1. **Create new request**
* Select *Requests* at the top.
* Select *Create New > New Request.*
1. **Fill out the Report Header**
* Give the *Trip Name* a descriptive, short name.
* Fill out all required (red) fields. Note that if the trip is being paid for by regular MSUE accounts and not a grant, the funding source will be *Other MSU (Non-Grant & Research).*
* Make sure to fill in the account, even though it is not in red.
1. **Fill in Segments**
* Select the *Segments* tab. This is for entering your airfare, rail costs, car rental costs, and hotel/accommodations costs.
* Select the appropriate icon for the cost you are adding.
* Complete the estimated amounts and required fields.
1. **Fill out Expenses.**
* Select the *Expenses* tab. This is for expenses beyond airfare, rail fare, car rental, and accommodations.
* Add any ground transportation you will need. For example, if you are taking a bus to the airport, Search for the Expense type of *bus* and add your costs. Include the date on which you think you will purchase the tickets for transaction date, and your estimate of the cost.
* Search for *Daily Meal Per Diem Allowance* then select it. It will automatically calculate your meal per diem based on the dates and where you are going. Note that when you submit the actual Expense report after traveling, you can exclude meals that you were provided or don’t need to be reimbursed for.
* Add any other expenses you anticipate.
1. **Submit the Request**
* Select Submit Request.

*For more details, see:* [*http://ctlr.msu.edu/download/travel/Request%20User%20Guide.pdf*](http://ctlr.msu.edu/download/travel/Request%20User%20Guide.pdf)

# **Out-of-State Expense Reports**

*Watch the video first, and then use the directions below as a quick reference.*

|  |  |
| --- | --- |
| Play, Start, Video, Film, Arrow, Media, Multimedia | [Submit an Out-of-State Expense Report](https://mediaspace.msu.edu/media/t/1_xukxfexz) |

1. **Find your request (authorization) for the trip to tie it to the Expense.**
* Go to *Requests.*
* Find the request and click on the *Expense* link to the right of your request. This links your Expense report to your trip Request and copies header information.

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| **NOTE**: Requests that have been approved will move to “Approved Requests” after **90 days**. They will no longer be visible as “Active Requests.” |

1. **Update the information in the Expense Report Header**
* Select *Report Details> Report Header*.
* Update the:
	+ Name (include time period you traveled), start and end date, trip purpose, indicate if there were shared expenses, account.
	+ Save.
1. **Add Expenses for how you go to the airport**
* Select *Add Expense.*
* Search for then select the appropriate expense type (Ex: Personal Mileage if you drove yourself to the airport).
* Fill in the details of that expense. Use the comments field to “tell your story” or include any details such as the fact that you left for the airport from your home, not your office, as it is closer to the airport.
* For personal care mileage, use the Mileage Calculator to determine your distance and reimbursement amount.
1. **Add Expenses for airfare**
* Select *Add Expense.*
* Search for then select *Airfare.*
* Fill in all the required Details. The vendor is required but you can add one if it isn’t in the list. All required details are red.
* Use the *Attach Receipt Image* link on the right to find and add your receipt.
* Select *Save Expense.*

NOTE: If you direct billed your airfare, it should show up in your available receipts with a payment type of “MSU Agency Card.” You still need to add it to your expense report so that the charge is made to the MSU account. It does not reimburse you, the traveler. For details, see <http://ctlr.msu.edu/download/travel/MSUAgencyCardFinal.pdf>

1. **Create your Travel Allowance**

*This is required whenever you are claiming a per diem.*

* Select *Report Details* and then *Manage Travel Allowance.*
* Select *Create New Itinerary.*
1. **Add details under *New Itinerary Stop (right portion of screen)***
* This will be the information detailing when and from where you left for your overnight stay.
* Fill out all fields. Times do not need to be precise.
* Select *Save.*
1. **Fill out the next stop**
* This will be the information about the next place you went from this overnight stay: home or, if you had a series of overnight stays in different place, the next place you went.
* Fill out all fields. Times do not need to be precise.
* Select *Save.*
* Either add in your next overnight stop or select *Next*.
1. **Enter in Expenses from your overnight stay(s): Meals**
* Select *Expenses and Adjustments* at the top (you can also just click *Next*).
* The system auto-calculates your per diems for each day based on location. For first and last day of travel, this is calculated at 75%.
* In the screen with your meals, select any meals that were provided and thus would be excluded from the expense report.
* Select *Create Expenses.*
1. **Enter in Expenses from your overnight stay(s): Hotel**
* Select *Add Expense.*
* Search for then select *Hotel.*
* Fill in Details: Dates, Vendor (search for and type in if it isn’t in list), Amount.
* Select *Attach* and navigate to and upload your receipts.
1. **Breakdown Hotel receipt charges**
* Select *Itemizations.*
* Select *Create Itemization.*
* Search for *Hotel Type.*
* Break down your room rate and taxes from your receipt.
* If the rate was different each night, you would select “Not the Same.”
* *Save Itemization.*
* *Save Expense.*
1. **Add agendas if you have one, or reason for your stay.**
* Select *Add Expense.*
* Search for *Agenda* in the text box (or other appropriate documentation).
* Select the expense type, select *Upload Receipt*, and then attach the document.
1. **Add any other expenses using Add Expense.**
2. **Allocate Your Expenses** (only needed if everything is not going to your default account).
* Select the expenses your allocation relates to using the check boxes on the left or select the top box to select all.
* Select *Allocate.*
* Allocate by percent or amount in the *Allocate screen*, using the Add button to add different accounts and the amount to be charged to each.
* Save when you are finished.
1. **Submit your Report**
* Select *Submit* Report.

# **Travel Scenarios FAQ**

The below scenarios answer some commonly asked questions. Be sure to consult with the [MSU Manual of Business Procedures](https://ctlr.msu.edu/combp/) and your fiscal officer for more information.

**Q1: Can I use my P-Card to pay for conference registration?**

Answer: Yes. If paid personally, conference fees will not be reimbursed until travel has been completed.

**Q2: I am traveling internationally for MSU business and need a visa and passport. Can I be reimbursed for these costs?**

Answer: Yes. If paid personally, associated application and shipping costs of visas and passport will not be reimbursed until travel has been completed.

**Q3:** **I have to be at a training at 7:00am and I live two hours away from it. Can I get a hotel the night before?**

Answer: There is no clear business policy for this, so it is up to the discretion of the organization. Ask your supervisor and fiscal officer for guidance.

**Q4:** **I am taking a taxi to dinner while traveling. It isn’t a required dinner; just a restaurant I want to try. Is this reimbursable?**

Answer: No. The only time this would be reimbursable would be if it were a required dinner and on the agenda.

**Q5: Is traveling by train instead of flying permissible?**

Answer: Yes, if it does not cost more than flying. “When travel is by train, the fare should not exceed the lowest available airfare and most direct, expeditious route.” ([MSU Manual of Business Procedures](https://ctlr.msu.edu/combp/HTTOC.aspx), section II. Transportation, C.)

**Q6: I have a long flight and the airline does not let me reserve an aisle seat without paying for a seat assignment. Is this permissible?**

Answer: No, you cannot pay for a seat assignment. However, booking with the Concur travel app should let you choose a seat and you can update your travel profile to include your seating preference (window or aisle).

**Q7: I am leaving from home for a business trip. Do I calculate my mileage from my office (which is farther from the trip’s destination) or from my home (which is closer)?**

Answer: Calculate mileage starting from the shorter of the 2 distances. In this case, from your home.

**Q8: I work in the Detroit area and am driving up to Iron River, Michigan and back for work. The round-trip mileage will be approximately 1100 miles. Should I take my personal car or an MSU or rental car?**

Answer: You must take a rental or MSU Extension / MSU motor pool vehicle. If your mileage reimbursements from driving your personal car meets or exceeds $500, you won’t get reimbursed past $500. Those working for MSU Extension with home offices in the Upper Peninsula have an exception to this rule.

**Q9: I am traveling to a conference with someone I supervise. Can we share a hotel room to save money?**

Answer: No. You also may not share a room with an MSU student (of any level of studies).

**Q10: I am on a tight budget and traveling for work. Putting three nights of a hotel room needed for business travel on my personal credit card is a financial hardship. Can I use my p-card to reserve a hotel room?**

Answer: No. Talk to your supervisor and fiscal officer about requesting a travel advance.

**Q11: I must travel in-state, leaving early in the morning and not returning until about 9pm. Thus, I will need to eat dinner on the road. Will I be reimbursed?**

Answer: No. Unless you are in overnight status, you cannot claim meals/per diem.

**Q12: I paid for the taxi from the airport to the hotel for myself and for three colleagues when we arrived. How should this be recorded?**

Answer: You should upload the receipt to be reimbursed for the full amount but designate it as a shared expense.

**Q13: I forgot to submit my expense report for a trip I finished 93 days ago. Can I still get reimbursed?**

Answer: No. You must submit all expense reports within 90 days. There are no exceptions.

**Q14: You are leaving to go to the airport at 6pm for your business trip. Do you get reimbursed for your dinner?**

Answer: Yes. On the first day of travel, you will receive 75% of the daily per diem, which should be more than cover dinner.

**Q15: You are going to conference in California. You want to take an indirect flight there, and first stop in Colorado and take two personal days to visit your college roommate before continuing to California. You see that doing this does not result in spending more on airfare. What do you need to do?**

Answer: Submit documentation comparing the flight prices. Comparative quotes for airfare must be obtained at the time of booking when an indirect flight for personal reasons is part of the trip. The quote may be obtained either via email from MSU’s preferred travel agent or via a screen shot from the Concur booking tool.

**Q16: I keep receiving emails from Concur Solutions that I have 1 travel request pending an expense report, why do I keep receiving this email message? What do I need to do to make it stop?**

Answer: You have a travel request that did not have any expense reports. You will receive this email 14 days after the Request/Trip End Date and every 14 days after until the request is auto closed, which happens 94 days after the request trip end date. The traveler is also able to close close/inactivate a request by clicking on the travel request and clicking the Close/Inactive Request button. Only close/inactivate a request if you will have no more expenses to report for that request.