

Faculty & Graduate Student Travel Guide

Travel arrangements at UMD - including pre-approval, flight, rail booking, and group travel arrangements - are made through Concur. Before you can make your travel arrangements, the first step in using Concur is creating a traveler or delegate profile. All travelers and delegates are **required** to create a profile in Concur prior to obtaining approval for travel events or making travel arrangements. The Concur profile contains critical information needed to seek approval, book trips, and process expense reports. The traveler's name in Concur must match the name on the ID used during travel (State-issued ID card, Driver's License, Passport). This is the name that will be on the tickets. Travel card and personal credit card numbers can be loaded into Concur to make the selection of payment types easy for travelers and delegates. When setting up your Profile make sure to verify your UMD email address and any other email addresses you want to add. Below you will find the steps of making your profile.

→ **How to create a profile in Concur:**

UNIVERSITY OF MARYLAND
Job Aid: User Profile Setup
SAP Concur


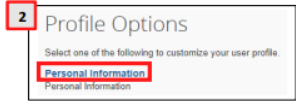

Setting up your Concur User Profile

From your profile, you can update your personal information, contact information, emergency contacts and other travel related information.


Screenshots are provided to use as visual guides for certain steps.

1. To access your profile, from the SAP Concur homepage, click **Profile** at the top-right, and then click **Profile Settings**.

2. Click on **Personal Information**.
 - Make sure your first, middle, and last name are **identical** to your name on the photo ID you will be presenting at the airport.
 - Add/update your addresses and contact information.
 - **Verify** your UMD email address and any other email addresses where you want notifications to be sent.
 - You can now email receipts to **receipts@concur.com**. They will be available in the **Available Receipts** section after clicking **Expense** at the top of the page.
 - Add your **Emergency Contact**.
 - Under **Travel Preferences**, add the relevant information for your traveling needs.

3. In the **TSA Secure Flight** section, select your gender and enter your Date of Birth.
 - Complete the **TSA Precheck® Known Traveler Number (KTN)** and a **DHS Redress No.** (if applicable) fields.



**If you have personally purchased TSA Precheck, please enter your Traveler Number in this field.*

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4. If applicable, in the **International Travel Passport and Visas** section, add your passport or international visa information. If you are not traveling internationally at the present time, this can be completed at a later date.

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5. If someone assists you with travel arrangements, in the **Assistants and Travel Arrangers** section, click **Add an Assistant** to assign someone to book travel for you or to assign them as your primary assistant for travel.

- Note: An assistant must be an existing Concur user and must have setup their Concur profile.

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6. In the **Credit Cards** section, click **Add a Credit Card** to add or update your Tcard information.

- Note: You are required to have at least one credit card saved in your profile before you can book with Concur. You may also add a personal credit card to the Concur system.

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7. After you have completed your profile, click **Save**.

7

8. Click on **E-Receipt Activation** on the left-hand side menu under **Other Settings**.

- Click on **Enable** and follow the prompts.
- This function is available **ONLY** when booking directly through Concur.
 - Booking outside of Concur or with CTP directly will not automatically create an E-receipt for you.
 - This function is only available with participating vendors.

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After you create a profile, you may request a travel card. Using a travel card will allow you to pay for costs directly, rather than using your personal card and waiting for reimbursement. Please note that travel cards cannot be used to book travel for other University employees. Anyone requesting a travel card is required to complete an application and training process prior to issuance of the card. To request a travel card, you will need to go into Concur to do so. To complete an application, you must complete the application in Concur.

Here are the steps to requesting a travel card.

→ **How to obtain a travel card:**

UNIVERSITY OF MARYLAND

Job Aid: Requesting a new Tcard
SAP Concur

How to request a new Tcard

The Tcard will be used for payments during travel and events

This Job Aid will go through the steps for requesting a Tcard through SAP Concur.

Screenshots are provided to use as visual guides for certain steps.

After you create a new request...

1. In the **Request Type** drop-down menu, select ***UMD Card Requests and Updates**.

2. Fill in the fields listed below:
 - **Request Name** – *Your legal name* + Tcard[^]
 - **Request Date** – Today's date
 - **User Type** – Choose from Staff, Faculty or Graduate Assistant
 - **Reason for Request** – New card
 - **KFS Account Number**

3. Click **Create** at the bottom-right.

4. Click the **Add** button under Expected Expenses and select **New Card Request**.

5. Fill in the fields listed below:
 - **Reason for Card** – Choose from Infrequent Traveler, Frequent or International Traveler, Department Admin - Hosting
 - **Business Phone Number**
 - **Monthly Credit Amount**
 - Please note, if you choose **Other**, the **Other Monthly Limit** field must be filled
 - In the **Comment** field, please leave a note on why you need a custom limit

6. Click **Save**.
7. Click **Submit Request** at the top-right.

[^]Adding "Tcard" after the cardholder name will facilitate tracking the number of Tcards that are being requested.

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Pre-approval is **required** for ALL UMD employees and sponsored visitors for out-of-state, overnight, and international travel. Pre-approval **must be obtained** from the UMD employee's immediate supervisor using the Travel Request in Concur prior to booking travel or making reservations. Travelers can use a personal credit card through Concur for booking airfare, train, hotel, and other allowable pre-travel expenses. For airfare and train tickets, the expense must be processed through the Concur system for consideration for reimbursement.

Below are steps to creating a travel request through Concur.

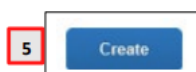
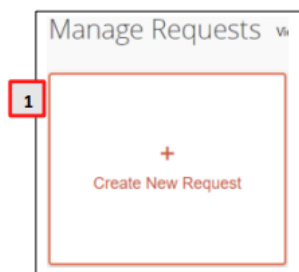
→ **How to enter a travel request:**



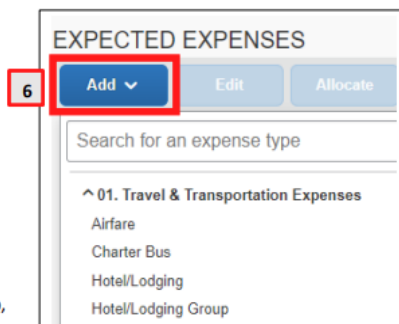
How employees can create a travel request

This aid is for Single Employees. Travel requests for Non-employees will be on another aid. Requests use estimated expenses. Actual costs will be added later when completing the expense report.

1. Click **Requests** at the top of the page
2. Click the **Create New Request** tile
3. Make sure the **Request Type** is correct
4. Required fields to complete:
 - **Trip Name/Purpose** – (Ex. ASSA Conf. April 2022)
 - **Business Travel Start Date**
 - **Business Travel End Date**
 - **Trip Purpose**
 - **Final Destination City**
 - **Traveler Type**
 - **Trip Type**
 - **Will this trip include personal travel?**
 - **UMD Campus Visit** – If travel is for a campus visit
 - **Campus**
 - **KFS Account Number** – Search function is defaulted to Text, but can be switched to Code.



5. Click **Create** at the bottom-right
6. Click **Add** under **Expected Expenses**
 - **Expense Type list** – Search for and select an expected expense for the trip (Ex. Airfare)
 - After you choose an expense:
 - **Amount** – Estimate cost for the expense
 - Click **Save**
7. Repeat **Step 6** for each expected trip expense.
8. After adding all of the expected expenses for this trip, click **Submit Request** in the upper-right corner.
9. Review the confirmation/acceptance statement and click **Accept & Continue**.
 - This request has now entered workflow for approvals.



→ **Booking Air/Rail Travel**

Travelers and Delegates are expected to book the least expensive, practical itinerary regardless of the booking or payment method. UMD **requires** the use of Concur or the designated Travel Management Company, Collegiate Travel Planners (CTP), for booking air and rail travel. Concur automatically applies UMD-contracted discounts with Amtrak and Delta, American, United, and Southwest airlines. This does not apply to commuter rail systems. Southwest Airlines can be booked through Concur directly. If you book a flight with Southwest Airlines, any flight changes must be done directly with Southwest Airlines, not with CTP. Electronic booking using Concur should be the first option for booking domestic and non-complex international flights.

Complex International travel is defined as a round-trip ticket itinerary containing more than 5 segments (including surface segments) or a round-trip ticket itinerary containing more than 2 business-required lodging stop-overs. Stop-overs required for overnight or next-day connections required by airline schedule are not treated as business-required. **For assistance** in booking complex international travel contact CTP.

Tickets booked on Concur or through CTP using a personal credit card **will not be reimbursed** until travel is completed. Travelers and Delegates should book refundable tickets in instances when cancellation may occur. Nonrefundable tickets, while less expensive, have more restrictions. UMD **will not reimburse** for tickets that had no cost such as “free” tickets earned through **frequent flyer miles, incentive programs, and gift cards/vouchers.**

If you decide to use the designated Travel Management Company, CTP is available to assist travelers with complex international travel and arrange for group travel events. To contact CTP, please look at the information below:

CTP Travel Team Hours: Monday-Friday, 7:30 am-6:30 pm CT

- Phone: **833-620-0714 (toll free)**
- Email: **umd@ctptravelservices.com**

Air/Rail Booking Fees: **Online booking with Concur = \$3.50; Agent Assisted = \$25.00**

CTP Group Department: Contact information should you have a need for any non-athletic group travel. Intercollegiate Athletics will continue to be supported by Anthony Travel.

CTP Group Travel Hours: Monday-Friday, 8:00 am-5:00 pm CT

- Phone: **800-810-2695 (toll free), 210-530-0857**
- Email: **groups@ctptravelservices.com**

→ Booking Lodging and Ground Transportation

You may book lodging and ground transportation in Concur or with CTP, but if traveling to a conference or event that offers a discounted hotel rate, book the hotel room through the conference or event site to ensure the group discount is included and no additional fees are incurred.

Stay in lodging with verifiable, reasonable, and appropriate rates as compared to other lodging options at the travel destination at that time. If rates obtained do not appear to be reasonable, CTP can assist in identifying appropriate lodging arrangements. UMD does not reimburse for premium lodging (suites, non-standard rooms) at the preference of the traveler.

→ Reimbursement for Travel Expenses

Travelers may be reimbursed for expenses related to official university travel that has been properly pre-approved. To get reimbursed, you must complete an expense report in Concur. Make sure to upload your receipts electronically to Concur via the website or via the Concur mobile app. Below are steps to help create an expense report.

→ How to create an expense report:

UNIVERSITY OF MARYLAND

Job Aid: Travel & Hosting – Expense Report (Single employee) SAP Concur

How to create an Expense Report

When creating an expense report for your trip, expenses will need to be added and itemized. Some fields for expenses you add will already be pre-populated with information from your original request. Please double check the information and fill in any other necessary fields.

This Job Aid assumes you have already submitted a travel request and it was approved.

Screenshots are provided to use as visual guides for certain steps.

After your request is approved...

1. Open the approved travel request and click **Create Expense Report** in the upper-right corner.

More Actions ▾
Create Expense Report

Date ▾	Amount ↑↓	Requested ↑↓
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2. Click on **Add Expense**.

REQUEST

Approved

\$300.00

Add Expense
Edit

3. A window will pop up with 2 tabs:
 - a) **Available Expenses** – Choose from a list of charges paid on the Tcard or created through Concur/Concur Mobile.

40 Available Expenses
+
Create New Expense

	Vehicle Rental	AMERICAN BUS RENT A CAR	07/05/2021	\$643.82
<input checked="" type="checkbox"/>	Undefined	Employment Agencies Temporary H	07/05/2021	\$715.89
<input type="checkbox"/>	Undefined	Hardware Equipment and Supplies	07/05/2021	\$799.90
<input type="checkbox"/>	Airfare	AMERICAN	07/05/2021	\$271.81

Close
Add To Report

(1) Click the **checkbox** on the left and click **Add To Report**.

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Instruction 3.a - continued

3a.2

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			*UMD-MC	Vehicle Rental	RESERVE RENT-A-CAR	07/10/2021	\$298.54

(2) The expense will now be listed. To open the expense on the report, click on any of the open spaces on the expense's line.

(3) If you see a **Request** drop-down menu, select the estimate from your request.

(4) Fill in or update any of the necessary fields after you open the expense. Expense amounts must be the actual amounts. When you are done, click **Save Expense**.

3a.3

Request *

01/31/2022, \$300.00 - test

None Selected

None

01/31/2022, \$300.00 - test

b) **Create New Expense** – Create additional expenses if they were out-of-pocket expenses, NOT done through Concur/Concur Mobile, and NOT paid on the Tcard.

- (1) Search for and select the expense type you need to add to the expense report.
- (2) If you see a **Request** drop-down menu, select the estimate from your initial request. (See image 3a.3.)
- (3) Fill in or update any of the necessary fields after you open the expense. Expense amounts must be the actual amounts. When you are done, click **Save Expense**.

3b

40 Available Expenses Create New Expense

Search for an expense type

^ Recently Used

- Parking
- Hotel/Lodging
- Airfare

These are steps for creating travel requests for **non-University travelers**.

→ **How to handle a non-University traveler:**

UNIVERSITY OF MARYLAND

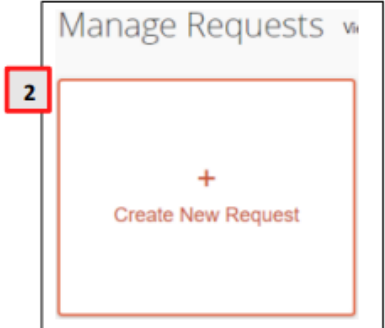
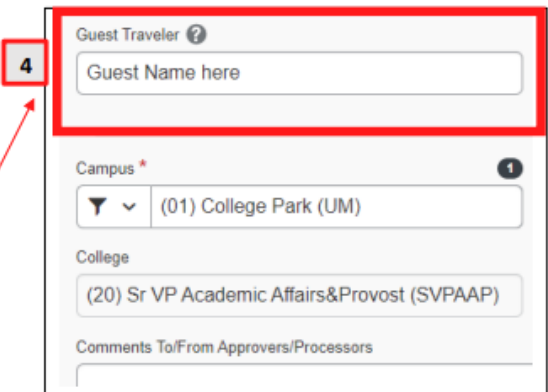
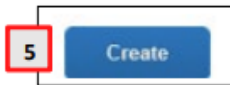
Job Aid: Travel & Hosting – Request (Single Non-employee)
SAP Concur

How to create a Request for a Single Non-employee

Non-employees are considered guests and non-employee students. Non-employees **do not have access** to UMD’s Concur system. **Non-employee data must be entered into the Financial System for reimbursement purposes**. An employee of UMD must create the travel request and expense report, for these guests.

This Job Aid assumes you know how to create a new travel request in Concur.
Screenshots are provided to use as visual guides for certain steps.

1. Click **Requests** at the top of the page
2. Click the **Create New Request** tile
3. Make sure the **Request Type** is correct
4. Fill in the fields listed below:
 - **Request Type** – *UMD Travel and Hosting (Parent to Expense)
 - **Trip Name/Purpose** – (Ex. John Smith April 2022)
 - **Business Travel Start Date**
 - **Business Travel End Date**
 - **Trip Purpose**
 - **Final Destination City**
 - **Final Destination Country**
 - **Traveler Type** – Guest[^] or Student
 - **Trip Type**
 - **Will this trip include personal travel?**
 - **Detailed Business Purpose/Benefit to University**
 - **UMD Campus Visit** – If travel is for a campus visit
 - **Guest Traveler** – Name of Guest*
 - **Campus**
 - **KFS Account Number**
5. Click **Create** at the lower-right of the screen.

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6. Click **Add** under **Expected Expenses**

- **Expense Type list** – Search for and select an expected expense for the trip (Ex. Airfare)
- After you choose an expense:
 - **Amount** – Estimate cost for the expense
- Click **Save**

7. Repeat **Step 3** for each expected trip expense.

8. After adding all of the expected expenses for this trip, click **Submit Request** in the upper-right corner.

9. Review the confirmation/acceptance statement and click **Accept & Continue**.

- This request has now entered workflow for approvals.

Guest[^]: *Concur considers non-employees to be a guests. If you select "Guest" or "Student" as a **Traveler Type**, you must add that person's name in the **Guest Traveler** field.*

→ How to create a reimbursement request for a non-University traveler:

UNIVERSITY OF MARYLAND

Job Aid: Travel & Hosting – Expense Report (Single Non-employee)
SAP Concur

How to create an Expense Report for a Non-employee

Non-employees consist of guests and non-employee students. Non-employees **do not have access** to UMD’s Concur system. **Non-employee data must be entered into the Financial System for reimbursement purposes.** An employee of UMD must create the travel request, or an expense report, for these guests. When adding expenses, some fields will already be pre-populated with information from your request. Please double check this information and fill in any other necessary fields.

This Job Aid assumes you have already submitted an event request and it was approved.

After your request is approved...

1. Open the approved travel request and click **Create Expense Report** in the upper-right corner.
2. Click on the header title of the expense report.
3. In the **Report Type** drop-down menu, select ***UMD Travel & Hosting – Guest**.
4. Fill in or check the required fields listed below:
 - **Guest Payee** – Enter full name of the Non-employee (Must have vendor record in Financial System.)
 - **Report/Trip Name**
 - **Business Travel Start Date**
 - **Business Travel End Date**
 - **Report/Trip Purpose**
 - **Final Destination City**
 - **Final Destination Country**
 - **Traveler Type** – Guest or Non-employee student
 - **Report/Trip Type**
 - **Will this trip include personal travel?**
 - **Detailed Business Purpose/Benefit to University**
 - **Campus**
 - **KFS Account Number**

➤ Then click **Save**.

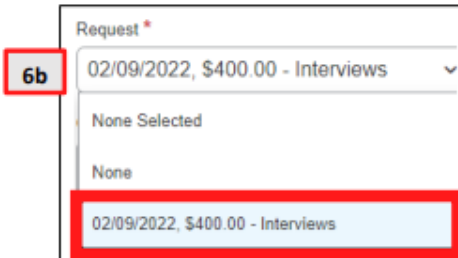
Cancel Save

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5. Click **Add Expense** and add/create the expenses for the report.

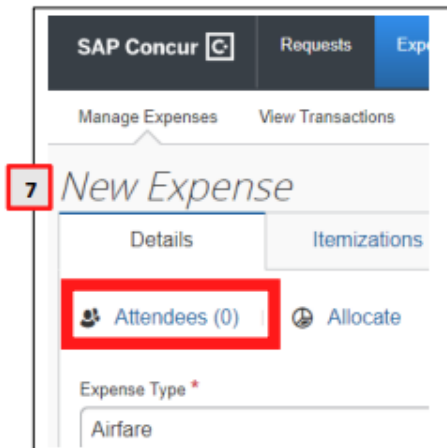
6. When filling in and checking the required fields for the expenses, please pay close attention to the fields below if they show up as part of an expense.

- a) **Payment Type** drop-down menu
 (1) If paid by guest, select ***Paid by Guest**
- b) If you see a **Request** drop-down menu, select the estimate from your original request.



7. Next, add the Guest as an attendee to the expense.

Below the **Details** tab, click on the **Attendees** link.



8. Click **Add**, then click the **Attendees** tab.

9. In the **Attendee Type** drop-down menu, select **Guest**.

10. Click the **Create New Attendee** link on the right.

11. Fill in or check the required fields listed below:

- **Attendee Type** – Guest or Student (non-employee student)
- **Last Name**
- **First Name**
- **Type of Guest**
- **Institution/Company**

12. Click **Create Attendee** then close out of this pop-up window.

➤ Then click **Save**.

You should now see a **"(1)"** to the right of the **Attendees** link.

For more information, please check out the information below:

→ **Weekly Concur Demos**

Attend a demo of the Concur system: **Thursdays at 11:00am**

<https://umd.zoom.us/j/92575410785>

→ **Help Desk**

UMD employees can get live support via Zoom at regularly scheduled times each week.

Concur Office Hours on Zoom: <https://go.umd.edu/qbB>

- Tuesday, 10-12
- Wednesday, 10-12
- Thursday, 1-3

→ **Support**

For assistance with Concur, you can email Travel and Card Services: concur-helpdesk@umd.edu

-or-

Phone support: **301-405-0607**