Concur User Guide
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Introduction

The purpose of this User Guide is to provide general information and instructions for the end user to complete travel arrangement in the UWA Travel Management system (Concur).

Disclaimer

The information contained within the user guide is for guidance and correct as of date of issue. If you have any recommended changes to the “User Guide” please email procurement@uwa.edu.au
Login

Concur Login


Enter your Pheme login ID and Pheme password.

![Login form]

**Note:**

- Prior to using Concur, you will need to have your Pheme account and UWA Email service activated.
- For best user experience, Concur recommends the use of Internet Explorer version 10 or later; Google Chrome version 30 or later; or Mozilla Firefox version 25 or later.
- Ensure pop-ups are enabled.
- Any communications from the Concur Travel Management System will be sent to your UWA email address.

Login Warning – UWA Terms of Use

Please read and be aware of the UWA Terms of Use.

By logging in and using the Concur Travel Management System, you acknowledged your compliance to the UWA Terms of Use.

To continue, click on OK.
Depending on user access level, you may see the following options on your Homepage.

Begin by reviewing and completing your Traveller Profile.
Traveller Profile Settings

Logging-in for the *first time*?

**Traveller MUST review and confirm their profile information!**

Traveller Profile Information *must be kept up-to-date with details in accordance with your current travel document* (e.g. passport that you will be using for travel). Traveller may be turned down at the gate if the name on the travel document used (e.g. passport or any other travel identification) does not match the name on the ticket issued by the Travel agent.

*Traveller* must update their profile *whenever the information has changed*.

It is the **Traveller’s responsibility** to ensure that Profile Information is up-to-date with details according to their current travel document.

**If you are arranging travel on behalf of a traveller, please ensure you have confirmed with the traveller that their profile is up-to-date.**

To update Traveller’s profile, click on **Profile** and select **Profile Settings**.

Traveller will be required to *review and complete* the following Profile Options menu item:

**Your Information**
- Personal Information
- Contact Information
- Email Addresses
- Emergency Contact

**Travel Settings**
- Travel Preference
- International Travel
- Frequent – Travel Programs

**Other Settings**
- System Settings
Important Notice:
Due to increased airport security, traveller may be turned down at the gate if the name on the travel document (e.g. passport) or any other travel identification used does not match the name on the ticket issued by the Travel agent (TMC).

It is the Traveller’s responsibility to ensure that Profile Information is up-to-date and matches their travel documentation.

If you are completing the Profile Information for the first time, **complete all the required information first** and click on **SAVE at the end**.

Review and complete all the required fields.

**CHECK** and **ENSURE** that First Name, Middle Name and Last Name shown on My Profile – Personal Information page are identical to the name on the traveller’s travel document.

Indicate by selecting the ‘No Middle Name’ tick-box if required.

Click **Save** to confirm details.
Contact Information

Complete the following Contact Information:
- **Work Phone**
- **Home Phone**
- **Mobile Devices**

To add a Mobile Device:
- Enter a **Device Name** (e.g. mobile phone 1)
- Select a **Device Type** from the drop down menu
- Select **Country code** from the drop down menu and enter **mobile phone number**
- Click **OK** (must click on OK, prior to Save)

Traveller can add multiple mobile devices as required.

**Travel alerts and risk messaging notices from the Concur Risk Management tool will ONLY be sent to the Primary Mobile Phone number.**

If a different mobile number is used while travelling, please ensure Primary Mobile Phone is updated on your profile.

Click **Save** to confirm details.

Email Addresses

Email 1 is the Traveller’s primary email address. It is used for all Concur related communication.

**Travel alerts and risk messaging notices from the Concur Risk Management tool will ONLY be sent to traveller’s primary email address - Email 1.**

Email verification is required for the system to link the information forwarded from the email address to the associated account.

Traveller will be required to verify **every** email addresses listed on this section.

**To verify email address:**

1. Once you have saved an email address, click the "Verify" link.
2. Check your email for a verification message from Concur.
3. Copy the code from the email message into the "Enter Code" box next to the Email address.
4. Click "OK" to submit the code and complete verification.

Additional email address can be added by clicking on **[+] Add an email address.**
**Emergency Contact**

Complete Emergency Contact information.

Click **Save** to confirm details.

**Travel Preference**

For seat-related preferences, please note that:
- not all airlines support all listed seat preferences
- in some cases, frequent flyer status may determine if seat preferences can be honoured
- some airlines will charge an additional fees on selected seats (e.g. exit rows, etc.)

Concur can collect your preferences and provide them to airlines or travel agencies, but cannot guarantee these preferences will be honoured for every reservation.

Indicate your Air Travel, Hotel and Car Rental Preferences as required.

To enter Frequent-Traveller programs click on the [+] Add a Program.
A pop-up window will appear where traveller can enter 5 travel programs at a time.

To add details:
1. Select the type of travel program (carrier name, car, rental or hotel) by clicking on the radio button underneath the icon.
   ![Icon](image)
2. Select the name of the company from the drop-down list.
3. Enter the program number.
4. Click **Save**.

Click **Save** to confirm updates made on Travel Preferences setting.

---

**International Travel: Passports and Visas**

Click on [+]{-} Add a Passport to complete passport details. This will opens up the Passport details section.

Complete all the required fields.

Indicate by selecting the tick-box ‘I do not have a passport’ where applicable.

To complete Visa details, click on [+]{-} Add a Visa.

Click **Save** to confirm details.
System Settings

Update Date Format and Time Format to your preference.

Ensure Time Zone (local time) is set to (UTC+8:00) Perth.

Click Save to confirm details.
Where to start?

Overview

In Concur there are two ways in which travel booking can be made:

1. **Online Trip Search**; or
2. **Requests** (Agency Assistance and quotation).

*Note:* Some users may not have access to the Online Trip Search functionality. To obtain quotes from a Travel Agent, click on Requests. Further information on user access can be found in **Identify Traveller** section below.

For further explanation of this figure refer to [https://youtu.be/rVivDkGgbTY](https://youtu.be/rVivDkGgbTY)
## Identify the Traveller

Depending on the access level, Traveller may have access to begin their travel booking from:

- Requests (Agency Assistance and quotation) only; or
- Both Requests and Online Trip Search

### Staff:
- Depending on staff HR status, traveller may have access to both Requests and Online Trip Search. Some exception applies e.g. Casual/ Adjunct/ Honorary staff have access to book travel via **Requests only** (Agency Assistance and quotation).

### Students:
- Higher Degree Research (HDR) students have access to **Requests only** (Agency assistance and quotation).
- All other students (Non-HDR) have access to Triplt functionality only. This access requires the Traveller (Non-HDR students) to book travel directly with the UWA Preferred Travel Agent (Campus Travel, STA Travel or Tertiary Travel) and Traveller **must** use their verified UWA primary email address* to forward their confirmed travel itinerary to [plans@concur.com](mailto:plans@concur.com). This is to ensure travel plans are captured within the UWA Travel Risk Management Tool in case of travel emergency/ evacuation. *Note: To verify your UWA primary email address, refer to – Traveller Profile Settings – Email Addresses section).

### Guest Traveller (Non-Profiled Traveller):
- Guest Traveller is defined as a person who is external from UWA, hence do not have a profile identifier with UWA (Non-profiled).
- Guest Traveller will not have access to login to Concur therefore their travel must be arranged by a Travel Arranger.
- Guest travel booking can only be made via Requests (Agency Assistance and quotation).
- Refer to Guest Traveller section for instruction on how to arrange travel for a guest (Non-profiled Traveller).
Online – Trip Search

To search for online live fare, begin your search from **Trip Search**.

Trip search can be performed for **Flights** (round trip, one way or multi city), **Hotel** and **Car Rental**.

When booking is required for hotel or car hire only, **but not airfare**, use the Hotel 🏨 tab or Car hire 🚗 tab.

Enter the departure and arrival city or airport **(From and To)**. When a specific airport destination if required, select from the dropdown list.

Enter the **date** and **time** of outbound and return.

Use the check box options to add hotel or car rental reservations.

Click **Search**.

If you do not have Flight Search on your homepage, you may have access to Agency Proposal and quotation only via Requests. Refer to the Requests section for more information.
Select Flights

Available airlines and the number of stop over matrix will be displayed.

Click on the airline logo to sort results by specific airline or click on the appropriate text on the left side of the grid to sort by stops.

To select an outbound flight for booking, click on the radio button associated with the fare.

If a return flight is requested, a selection of the Return flights will be displayed (alternatively you can click on the Return bar).

Select a Return flight by clicking on the radio button associated with the fare.

Note:
Depending on the type of fare selected, a Travel Policy Violation pop-up window may appear and you will be required to provide a reason for the chosen flight.

Select a reason from the drop down list, provide a brief explanation and click on Save.

For more information about Baggage Fee Policies, Fare Rules or ticketing conditions click on the displayed text.
Selected outbound and/or return flights will be displayed in the Chosen Carriers section.

To confirm selected flight/s, click on Select.

Click on Reserve to confirm selections.

Validate flights information.

Ensure Traveller Information is correct.

Where applicable, frequent flyer program can be entered here.

Click on Select Seats to request seat allocation.

Review the Fare rules and restrictions. To continue, click on Reserve Flight and Continue button.
Select a Hotel

On the displayed map, the reference point is indicated by the red icon. The numbered icons are the hotels located within the specified search radius.

If hotel booking is requested, a selection of hotels will be displayed.

Where necessary, hotel search criteria can be updated from the left side panel.

Review the hotel search results.

To filter results, use the “Sorted By” or “With names containing”.

To view hotel details, click on more info. To compare hotels, click on compare.

To select a specific room type, click on choose room.
Hotel rates indicated in green are within UWA recommended range.

When selecting a hotel rate which is outside the UWA recommended range, you will be required to provide a reason.

Click on Select to confirm.

Review and Reserve Hotel

Review selected hotel details.

Provide Hotel Room Preferences where applicable.

Enter/ verify guest information.

Review the price summary.

Hotel reservation will require a credit card details to be entered. Credit card details will be used to confirm your hotel reservation.

Click on “Add credit card” to open the pop-up window and complete all the required fields.

All fields in this section are required and must be completed.

Click Save.
Review the rate details and cancellation policy provided by the hotel.

Select the check-box to indicate “I agree to the hotel’s rate rules, restrictions and cancellation policy”.

Click Reserve Hotel and Continue.

Travel Details

Review Travel Details.

Review Reservations details.

Where necessary, booking can still be amended by clicking on “Change” and/or additional booking can be made by clicking “Add to your Itinerary”.

Click Next to continue.
**Trip Booking Information**

Enter **Trip Name**. Be specific, this description will appear on your homepage upcoming trip list.

Add a **Trip Description** to further define the purpose of travel.

At this point of the process, travel bookings are **not yet** finalised. If you close at this point, your reservation may be cancelled.

Click **Next**.

---

**Trip Confirmation**

**Review information.**
Check your Reservations.

Click on **Confirm Bookings**.

**Note:**

At this point of the process, ticket is reserved but **not yet** issued to the Traveller. Bookings can only be submitted when all the required information regarding risk and expenses allocation have been completed. Proceed to the next section.

**Request Header**

Information previously entered will be pre-populated here:
- Booking Type (Concur TRAVEL)
- Trip Name
- Departure and Return Date
- Number of Travel Days
- Travel Service Provider (Campus travel is the default Travel Agent for Online booking reservation)
Request can only be submitted once all the required mandatory fields are completed. Mandatory fields are indicated by red coloured side bar.

**Complete the following fields:**

<table>
<thead>
<tr>
<th>Number of Private Days</th>
<th>Private Days - Travel Date Ranges</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**UWA Employee:**

Entering private days here does not automatically update your leave on the HR Employee Self Service (ESS) system. Private travel days will need to be booked through the ESS system as annual recreation leave (or other as advised by HR) but also include time taken in lieu or through accumulated flexi time.

Where applicable, enter the **Number of Private Days** and indicate your **Private Days – Travel Date Range** in the text-box.

Hover around `?` icon to look up for definition of Business and Private Days.

Select from the drop down list, your **Travel Purpose**.

Enter a **Trip Description**.

Questions about age and pre-existing medical conditions are required for insurance purposes.

Failure to disclose could result in insurance cover being declined.

**Traveller** is responsible to complete and attach the **UWA Travel Risk Assessment Form** when:

- Main Destination Country is indicated as High or Extreme Risk and/or
- Travel Activity is indicated as High Risk Activity

Failure to complete and/or to provide the required information may result in travel request being rejected by your Travel approver.

### Main Destination City and Country Risk Level

<table>
<thead>
<tr>
<th>Main Destination City</th>
<th>Main Destination Country</th>
<th>Travel risk advisory - Low (Level 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tullamarine (Airport - MEL), Tullamarine (Airport)</td>
<td>AUSTRALIA</td>
<td></td>
</tr>
</tbody>
</table>

Main Destination City and Country Risk Level information will be displayed here.

Click on the Travel Risk Advisory to view details of the country’s summary and risk information.

Select from the drop down list, your travel Main high-risk activity.

Where applicable, specify any other high-risk activities.

Indicate if you are returning to your home country.

Click on Save.

Continue to the next section by clicking on the Segments tab.

### High- Risk Activity

<table>
<thead>
<tr>
<th>Indicate the main high-risk activity</th>
<th>Other high-risk activities</th>
</tr>
</thead>
</table>

Indicate if you are leading a group and enter your Travel parties in the available text box.

### Segments

Travel segments previously selected via Trip Search (e.g. Air Ticket, Car Rental and/or Hotel reservation) will be displayed here.
If further amendment is required, click on Modify and follow the prompt. Modifying the trip at this point will bring you to the Travel details page (where travel segments can be added/change).

Continue to the next section by clicking on the Expenses tab.
Previously selected segments (e.g. Airfare, Accommodation or Car Rental) will be displayed on the left.

Any other Expenses associated to this travel should now be added.

To create a new expense type, select an Expense Type from the list.

Complete the following information:

- **Transaction Date** (can be entered as travel date)
- **Amount** (*indicate* the total amount for this expense type)
- Add any Description or Comment.

Click **Save**.

To create another expense type, select an Expense Type from the list and repeat the above steps.
Once added, all the Expense Types will be listed on the left panel.

To Allocate funding, select Expense Type by ticking the box and click on Allocate.

The system will automatically group and select all the listed segment components together.
EACH Expense Type must be ALLOCATED SEPERATELY using the most appropriate ACCOUNT CATEGORY and ACCOUNT CODE.

To allocate expenditure:

Step 1 – Decide the number of lines required for each segment allocation and create the lines by clicking on the “Add New Allocation” button.

In this example, segment allocations are required for car rental, airfare, accommodation, conference & course fees and per diem. Therefore, a minimum of five individual lines for each segment component is required.

If only one segment is listed (e.g. just for Airfare), you do not need to add new line for allocation as the first line has automatically been created).

Step 2 – Complete each line allocation details.

Complete the Allocation line details based on the amount noted on the left.

Allocate By

Select your preferred method of allocation, by Percentage or Amount (system default is Percentage). Allocation By Amount is the recommended method.
### Amount

Update the **Amount** for each segment allocation (based on the amount noted on the left).

### Funded By

Indicate the “Funded By” arrangement for each line, i.e. **Externally Funded**, **Self-Funded** or **UWA**.

- **UWA Funded** - will require BU/PG/Account code allocation.
- **Externally Funded** will require BU/PG/Account code allocation. Amount will be recouped from the external party by UWA.
- **Self-Funded** – no allocation required (Travel Agent will contact the Traveller to finalise payment).

### Business Unit

**Update Business unit** for each required allocation line.

Use the scroll-bar or the search functionality:
- Select **Text** and type in **Business Unit name**; or
- Select **Code** and type in **Business Unit number**

### Project Grant

The list of Project Grants within the selected Business Unit will now be listed.

**Select Project Grant** for each allocation line.

Use the scroll-bar or use the search functionality:
- Select **Text** and type in **Project Grant name/description**; or
- Select **Code** and type in **Project Grant number**
**Account Category and Account Code**

Account Category and Account Code are inter-related fields.

In this example, based on the Account Category of Airfare, indicate whether the expense (Account Code) relates to Airfare for:
- Domestic Trip
- International Trip; or
- Visitor Related

Select an Account Category and the appropriate Account Code for each allocation line.

**Class Field – optional (Only to be used by those Faculties using Class Field)**

Class Field information is not mandatory.

To enter a Class Field:
1. Select Business Unit under CF Business Unit field (the selected CF Business Unit must be the same as the selected Business Unit).
2. Select the appropriate Class Field from the drop down list.

Click Save when segment allocation lines are completed.
An expense line which has been fully allocated is indicated with the “Fully Allocated” symbol 📅

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>27/06/2016</td>
<td>Airfare</td>
<td>AUD $500.00</td>
<td>AUD $500.00</td>
</tr>
<tr>
<td>27/06/2016</td>
<td>Accommodation</td>
<td>AUD $800.00</td>
<td>AUD $800.00</td>
</tr>
<tr>
<td>28/06/2016</td>
<td>Car Rental</td>
<td>AUD $500.00</td>
<td>AUD $500.00</td>
</tr>
</tbody>
</table>

An expense line with partial allocation is indicated with the “Partially Allocated” symbol 📅

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/10/2016</td>
<td>Conference &amp; Course Fees</td>
<td>AUD $600.00</td>
<td>AUD $600.00</td>
</tr>
</tbody>
</table>

**Attachments**

**Requirements for the images**

- **ONLY** scanned images, saved images, or PDFs can be attached to requests (Word and excel document must be saved as PDF before it can be attached here).

- Before images are scanned, note the following:
  - The images should be scanned at 300 DPI or lower to reduce file size.
  - The file format must be PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF.
  - There is a size limit for each image file – generally 3 or 5 MB
  - NOTE: The limit is noted in the image upload window.
  - No more than 10 files may be uploaded in a single session.

To attach an image to a request, click on Attachments and select Attach Documents.
The file format must be .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff.

5MB limit per file.

1. In the window that appears, click on Browse and navigate to the location of the saved images and select the file to upload.
2. Select file and click Open. The file is added to a list under Files Selected for uploading.
3. Repeat the process until all files (up to 10) are listed under Files Selected for uploading.
4. Click Upload.
5. Click Close when done uploading.

NOTE:
- All attachments are combined into a single PDF.
- You can delete the PDF if the request has not yet been submitted or if the request has been returned to you by your approver.
- To delete images from a request, select Attachments > Delete Documents. The entire set of attachments (the single PDF) will be removed from the request. You cannot delete individual attachments.

Submit Request

Once all the Expense Types are fully allocated, the requisition can be submitted.

Click on Submit Request.
Approval Flow

The Approval Flow tab displays the Approver name/s and the status of the approval at each level.

Audit Trail

The Audit Trail tab displays actions/changes relating to this requisition.
To create an Agency Assistance and quotation request, click on **Requests**.

Click on **New Request**.

**Request Header**

Request can only be submitted once all the required mandatory fields are completed. Mandatory fields are indicated by red coloured side-bar.

Complete the following fields:

**Booking Type**

To enable the request to be sent to the Travel Service Provider, select **Concur REQUEST** from the Booking Type drop down menu.

**Trip Name**

Enter a **Trip Name** (Limit 32 characters).

Further description/ explanation of your trip can be entered on the **Trip Description**.

**Departure Date** and **Return Date**.
The number of Travel Days will automatically be calculated based on Departure and Return Date input.

Where applicable, enter the **Number of Private Days** and indicate your Private Days – Travel Date Range on the text-box.

Hover around icon to look up for definition of Business and Private Days.

**UWA Employee:**

Entering private days here does not automatically update your leave on the HR Employee Self Service (ESS) system. Private travel days will need to be booked through the ESS system as annual recreation leave (or other as advised by HR) but also include time taken in lieu or through accumulated flexi time.

From the drop down list select a **Travel Service Provider**.

Each request can only be sent to **ONE** selected Travel Service Provider.

If you require quotations from more than one Travel Service Provider, you will need to copy this requisition and re-submit the request to another Travel Service Provider.

Select **No Quote Required** when a quotation is not required from UWA Travel Service Provider. For instance, when travel has been organised and booked by an external organisation and this requisition is created for the purpose of obtaining travel approval from your manager/supervisor and attaching travel itinerary for UWA risk management and insurance).

Select from the drop down list, your **Travel Purpose**.

Enter a **Trip Description**.

**Traveller** is responsible to complete the **Travel Risk Assessment** when:

- Main Travel Destination city and/or country is indicated as High or Extreme
- Travel Activity is indicated as High Risk Activity

**Failure to do so may result in travel not being approved.**


**Main Destination City and Country Risk Level**

Enter your **Main Destination City and Country.**
The Country Travel Risk Advisory will be displayed.

Click on the hyperlink to view details of the country’s summary and risk information.

<table>
<thead>
<tr>
<th>Main Destination Country</th>
<th>Select one</th>
</tr>
</thead>
</table>

**High-Risk Activity**

Indicate the main high-risk activity

Other high-risk activities

Are you returning to your home country?

<table>
<thead>
<tr>
<th>Are you aged 80 or over at time of travel?</th>
</tr>
</thead>
</table>

Do you have a pre-existing medical condition?

<table>
<thead>
<tr>
<th>Are you leading a group?</th>
</tr>
</thead>
</table>

Travel parties

A risk assessment has already been completed by another traveler?

Indicate if you are returning to your home country.

Select from the drop down list, your travel **main high-risk activity**.

Where applicable, specify any other high-risk activities.

Question about age and pre-existing medical conditions is required for insurance purposes.

Failure to disclose could result in insurance cover being declined.

Indicate if you are leading a group and enter your Travel parties in the available text box.

If you are leading a group to (or through) a city with high risk location rating and/or performing high-risk activity, a risk assessment must be completed.

**UWA Travel Risk Assessment (destination and activity) Template** can be found on [http://www.staff.uwa.edu.au/procedures/risk/management](http://www.staff.uwa.edu.au/procedures/risk/management)

**Segments**

Segments consist of Air Ticket, Car Rental and Hotel Reservation. Complete segment information as required and indicate on each segment whether a quotation from the selected Travel Agent is required.
Click on icon to create the required segment

**Air Ticket segment**

Select flights options - **Round Trip**; **One Way**; or **Multi-Segment**.

Complete the following information:

Select flights options - **Round Trip**; **One Way**; or **Multi-Segment**.

### Round Trip/ One way

Complete the following mandatory fields:
- **From** and **To**
- **Date** and **Time**
- **Travel Class**.

**Quote Required?** — Tick the box when requiring a quotation from the selected Travel Agent. Un-tick this box when quote is NOT required for this particular segment.

Use the Airline dropdown list to request for a particular airline and use the Comment box to add comments regarding flights to the Travel Agents.

When a Round trip is selected, complete the Return flight details:
- **Date and Time**
- **Travel Class**

Scroll down and click on **Save**.

Without saving, the data input will not be retained.
**Multi-Segment**

For Multi-Segment flights, complete all the required information on each of the additional air-segments.

To add/ remove air segment, scroll down and click on the appropriate button.

The “Add Segment” button will allow traveller to create/ add up-to six destinations.

If you need to add more than six destinations, click on the air segment icon again and select Multi-segment on the flight option to open-up another set of input fields.

Scroll down and click on **Save** when data input has been completed.

---

**Car Rental segment**

Complete the following information from the Pick-up and Drop-off fields:

- **City and Date.**
- **Quote Required?** – Tick the box when requiring a quotation from the selected Travel Agent. Un-tick the box when quote is NOT required for this particular segment.
- **Select Type of Car** required (Automatic/ Manual, etc. Default selection is Automatic-Compact).
- Use **Detail or Comment text** box to add comments about car hire to the Travel Agent.
- Select a particular **Vendor** from the drop-down list if required.

Click on **Save** once the car rental segment is completed.
Hotel Reservation segment

To add multiple hotel reservation in different city/location, click on the hotel reservation icon again and complete the next reservation information.

When Hotel Reservation is booked outside Concur (e.g. as part of a Conference package deal), un-tick Quote Required option and complete the hotel reservation detail for the purpose of risk management. Your travel details will then be stored in the Concur System.

Submit Request

Once you have completed all the required segments for air ticket/ car rental/ hotel reservation in which you require quotation for, click on the Submit Request button. At this stage of the requisitioning process, clicking the “Submit Request” button will send the request to the selected Travel Agent to provide quotation/s.

If you do not require quotation from the Travel Agents for any travel segments, skip this section and continue by clicking on to the Expenses tab (and see note below on Expenses).
Email Notification from Travel Agent – Proposals available for Reviewing

When Travel Agent proposal is available for review, an email notification will be sent to the Traveller/ Travel Arranger. Example of the email notification:

To view Travel Agency Proposal, login to Concur.

Review and select Proposal

To review the Travel Agent’s Proposal, go to the Segments tab and click on Agency Proposal.

To view additional information click on the Travel Agent’s comments icon.

Indicate your selection by clicking on the Select button at the bottom of your preferred Proposal.
Once the Travel Agent proposal has been selected (where applicable), continue by clicking on the Expenses tab. Selected segments' proposal (e.g. for Airfare, Accommodation or Car Rental) will be displayed on the left.

Any other Travel Expenses associated to this travel should now be added.

To create a new expense type, select an Expense Type from the list.

Complete the following information:

- **Transaction Date** (can be entered as travel date)
- **Amount** (*indicate* the total amount for this expense type)
- Add any Description or Comment if required.

Click Save.

To create another expense type, select an Expense Type from the list and repeat the above steps.
Once added, all the Expense Types will be listed.

To Allocate funding, select Expense Type by **ticking the box** and click on **Allocate**.

The system will automatically **group and select** all the listed segment components together.
**EACH Expense Type must be ALLOCATED SEPERATELY using the most appropriate ACCOUNT CATEGORY and ACCOUNT CODE.**

To allocate expenditure:

**Step 1** – Decide the number of lines required for each segment allocation and create the lines by clicking on the “Add New Allocation” button.

In this example, segment allocations are required for car rental, airfare, accommodation, conference & course fees and per diem. Therefore, a minimum of five individual lines for each segment component is required.

If only one segment is listed (e.g. just for Airfare), you do not need to add new line for allocation as the first line has automatically been created).

**Step 2** – Complete each line allocation details.

Complete the Allocation line details based on the amount noted on the left.

**Allocate By**

Select your preferred method of allocation, by **Percentage** or **Amount** (system default is Percentage). **Allocation By Amount** is the recommended method.
**Amount**

Request List

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Group</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/06/2016</td>
<td>Car Rental</td>
<td></td>
<td>AUD 500.00</td>
</tr>
<tr>
<td>27/06/2016</td>
<td>Airfare</td>
<td></td>
<td>AUD 750.00</td>
</tr>
<tr>
<td>27/06/2016</td>
<td>Accommodation</td>
<td></td>
<td>AUD 800.00</td>
</tr>
<tr>
<td>27/06/2016</td>
<td>Conference &amp;</td>
<td></td>
<td>AUD 600.00</td>
</tr>
<tr>
<td>27/06/2016</td>
<td>Fer Diem</td>
<td></td>
<td>AUD 400.00</td>
</tr>
</tbody>
</table>

Update the **Amount** for each segment allocation (based amount noted on the left).

**Funded By**

Indicate the “Funded By” arrangement for each line, i.e. Externally Funded, Self-Funded or UWA.

- UWA Funded - will require BU/PG/Account code allocation.
- Externally Funded will require BU/PG/Account code allocation. Amount will be recouped from the external party by UWA.
- Self-Funded – no allocation required (Travel Agent will contact the Traveller to finalise payment).

**Business Unit**

Update **Business unit** for each allocation line.

Use the scroll-bar or the search functionality:
- Select **Text** and type in Business Unit name; or
- Select **Code** and type in Business Unit number

**Project Grant**

The list of Project Grants within the selected Business Unit will now be listed.

Select **Project Grant** for each allocation line.

Use the scroll-bar or the search functionality:
- Select **Text** and type in Project Grant name/description; or
- Select **Code** and type in Project Grant number
Account Category and Account Code are inter-related fields.

In this example, based on the Account Category of Airfare, indicate whether the expense (Account Code) relates to Airfare for:
- Domestic Trip
- International Trip; or
- Visitor Related

Select an Account Category and the appropriate Account Code for each allocation line.

Class Field – optional (Only to be used by those Faculties using Class field)

Class Field information is not mandatory.

To enter a Class Field:
1. Select Business Unit under CF Business Unit field (the selected CF Business Unit must be the same as the selected Business Unit).
2. Select the appropriate Class Field from the drop down list.

Click Save when segment allocation lines are completed.
An expense line which has been fully allocated is indicated with the "Fully Allocated" symbol.

An expense line with partial allocation is indicated with the “Partially Allocated” symbol.

Attachments

Requirements for the images

- **ONLY** scanned images, saved images, or PDFs can be attached to requests (Word and excel document must be saved as PDF before it can be attached here).

- Before images are scanned, note the following:
  - The images should be scanned at 300 DPI or lower to reduce file size.
  - The file format must be PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF.
  - There is a size limit for each image file – generally 3 or 5 MB
  - NOTE: The limit is noted in the image upload window.
  - No more than 10 files may be uploaded in a single session.

To attach an image to a request, click on Attachments and select Attach Documents.
The file format must be .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff.

5MB limit per file.

1. In the window that appears, click on Browse and navigate to the location of the saved images and select the file to upload.
2. Select file and click Open. The file is added to a list under Files Selected for uploading.
3. Repeat the process until all files (up to 10) are listed under Files Selected for uploading.
4. Click Upload.
5. Click Close when done uploading.

NOTE:
- All attachments are combined into a single PDF.
- You can delete the PDF if the request has not yet been submitted or if the request has been returned to you by your approver.
- To delete images from a request, select Attachments > Delete Documents. The entire set of attachments (the single PDF) will be removed from the request. You cannot delete individual attachments.

Submit Request

Once all the Expense Types are fully allocated, the requisition can be submitted for approval.

Click on Submit Request.

The requisition is now pending approval.
Copy Request

Only Booking Type – Concur REQUEST can be copied.

To check, select the requisition you wish to copy and ensure the Booking Type noted on the Requisition Header is Concur REQUEST.

To copy a request:

On the Manage Request page, select the desired request.

Click on Copy Request.

Enter a new Request Name.

By default, the system sets the start date of the resulting request to be the source request end date plus one day. Update the start date, if desired.

Click OK.

Continue by completing necessary Request details.
Arranging Travel on behalf of another Traveller

Nominate your Travel Arranger

**Traveller – please NOTE:**

When the assistance of a Travel arranger is required,

**Traveller will need to login to Concur and nominate another user to be their Travel Arranger.**

By nominating another user to be your Travel Arranger, you are giving consent and approval for the Travel Arranger to have access to your Profile - Personal Information. This includes your home address, contact number, emergency contact details and Travel documents information (such as passport details).

The following steps are to be completed by the Traveller to nominate another user as their Travel Arranger:

1. Click on Profile and Profile Settings.
2. On the left selection options, under Request Settings, click on Request Delegates.
3. On the Delegates’ window, click on Add and search for the Travel Arranger name/employee ID.
4. Once a name selected, click on Add.
Select the following delegate’s options:
- Travel Arranger’s name
- Can Prepare
- Can Submit Reports
- Can Submit Requests
- Can View Receipts
- Received Emails

Click Save.

Arranging Travel on behalf of another Traveller

Once the Traveller has nominated another user as their Travel Arranger in their profile, the Travel Arranger will be able to search for the Traveller and arrange travel on their behalf. In Concur this is referred to as “Acting as other user”.

The following steps are to be undertaken by the Travel Arranger to arrange travel on behalf of the Traveller:

- Login to Concur (using your own login ID).
- Click on Profile.
- Under Acting as other user, enter the Staff ID or the Traveller’s name you wish to arrange travel for. Select name from the drop down list.
- Click on Start Session.

Once Traveller’s view is activated, the profile tab will indicate “Acting as Traveller name”.

Travel arranger can now arrange travel on behalf of the Traveller. Use the Online –Trip Search (where appropriate) or Requests Agency Assistance & Quotation.

When completed, click on Done acting for others.
Guest Traveller (Non-Profiled Traveller)

Steps to be completed when booking travel for Guest Traveller (i.e. external party/ someone without UWA profile):

1. Guest Traveller to complete Section 1 of the UWA Guest Profile Form. Completed form must be return to UWA to enable user profile creation.
2. Create Guest Traveller profile in Concur. ONLY staff member which has been appointed by the Faculty as the Guest Profile Creator and has been granted access can perform the task of creating the Guest User Profile in Concur.
3. Assign Travel Arranger/s for the Guest Traveller.
4. Travel Arranger completes the Guest Profile Information (as per the UWA Guest profile Form) and arranges travel on behalf of the Guest Traveller via Requests (i.e. Agency Assistance and quotation).

Step 1 – Guest Traveller to complete Section 1 of the UWA Guest Profile Form

UWA Guest Traveller Profile Form can be found on UWA Financial Services website.

Section 1 of the UWA Guest Traveller Profile Form MUST BE COMPLETED by the Guest Traveller.

Personal information provided on this form must be identical to the Traveller's Travel Document (e.g. passport).

Completed form must be return to UWA to enable user profile creation.

Step 2 - Create Guest Traveller’s Profile (Task to be performed by Guest Profile Creator)

To create guest profile, click on the Administration menu and select Company Admin from the drop-down option.
Click on the Add User menu.

From this options, only select:

✓ Request User

General Settings

Complete the following sections:

CTE Login Name*

(must be suffixed with a valid domain)

Password*

Verify Password*

Create a CTE Login Name for the guest user.

The following naming convention MUST be used:

guestfirstname.surname_GUEST@uwa.edu.au

For example, guest name is Joe Blogg, create login name as joe.blogg_GUEST@uwa.edu.au

Enter a Password: UWAGUEST

Verify Password by re-entering the same password used above.

Note: Guest user will NOT be able to use this CTE Login Name and password to login to Concur. This set-up is required only for system profile.
Enter Guest Traveller’s details:

- **Title**
- **First Name**
- **Middle Name** (where applicable)
- **Last Name**

**CHECK** and **ENSURE** Guest Traveller’s **First Name**, **Middle Name** and **Last Name** are identical to the Guest Traveller’s travel document.

Due to increased airport security, traveller may be turned down at the gate if the name on the travel document (e.g. passport) or any other travel identification used does not match the name on the ticket issued by the Travel agent (TMC).

**Account Activation Date** (Defaulted to guest profile creation date).

**Employee ID** – enter **UWAGUEST_Surname**

For example, guest surname is Blogg, create Employee ID as **UWAGUEST_Blogg**.

Enter **guest traveller’s email address**. This information is required by the Travel Agent for booking purposes.

**Request Settings**

- **Employee Group**: select **Guest UWA**.
- **Country of Residence**: select a country from the drop-down list.
- **Reimbursement Currency**: select **Australia, Dollar**.
- **Business Unit**: select the appropriate business unit.

**Complete the following sections**:

- **Employee Group**: select **Guest UWA**.
- **Country of Residence**: select Guest visitor’s **Country of Residence** from the drop-down list.
- **Reimbursement Currency**: For reimbursement currency, **Australia, Dollar** MUST be selected.
- **Business Unit**: Select the Business Unit in which the Guest Traveller will be associated with.
Requires Domestic Approval must be ticked √.

Search and select an Employee ID to emulate Approval Hierarchy.

Use Code to search for Employee ID, or Text to search for Employee Name.

Click Save once all the required information is completed.

Do NOT use the Save and Notify New User. New Guest User will not be able to login to Concur without the required Pheme login access.

If you see the following message on Save, click on OK to continue.

Step 3 – Assign Traveller Arranger for the Guest Traveller (Task to be performed by Guest Profile Creator)

Once a guest Profile is created (step 1 above), assign Travel arranger/s to the Guest Traveller Profile.

From the Administration drop-down view, select Company Admin.

Click on User Administration.
Search for the Guest Traveller’s profile by inputting a Search Text and using the available filter selection.

Click on the Guest Traveller’s Name.

Scroll down to Request Settings and click on **Request Delegates**.

A pop-up window will appear.

On the Delegates’ window, click on **Add** to nominate a Travel Arranger who will be organising travel on behalf of the guest traveller.

Search for the travel arranger name/ ID on the search text box and click on **Add**.
Select the following delegate’s options:
- Travel Arranger’s name
- Can Prepare
- Can Submit Reports
- Can Submit Requests
- Can View Receipts
- Received Emails

Multiple Travel Arrangers can be assigned to the Guest Traveller’s profile (where necessary) by following the same process above.

Click Save and close the pop-up window.

Step 4 – Complete Guest Traveller Profile Information and arranges travel on behalf of the Guest Traveller (Task to be performed by Travel Arranger)

Prior to arranging travel for the Guest Traveller, review and complete all the required fields on the Guest Traveller’s Profile Information.
Search and select the Guest Traveller’s profile and click on Start Session.

This is the Concur Homepage for the Guest Traveller.

Click on the drop down view icon next to the Guest Traveller’s name.

Click on Profile Settings and complete all the required fields on behalf of the Guest Traveller (Information as per UWA Guest Traveller Form).

Once Guest Travel Profile is updated, travel can be arranged for the Guest Traveller.
Reviewing and Approving Travel

Email notification – Request Pending Your Approval

Travel Approver will receive an email notification when there is a requisition waiting for your approval.

To review the Request, login to Concur (Concur web link address is available at the bottom of the email received).

Note:
If you are approving Travel on behalf of another Approver, refer to notes under Delegating Approval – Approving Travel as an Approval Delegate.

Reviewing and Approving Travel Request

To review and approve travel request, login to Concur.

On the Homepage, click on **Required Approvals**.

A list of Requests waiting for your approval will be listed.

To review the travel request, click on the associated Request Name.
Request Header

Review all the necessary information from the Request Header section, such as:

- Trip Name
- Departure/Return date
- Private Days
- Trip Purpose and Description
- Risk and Insurance related questions:
  - Main Destination Country Risk level
  - Age and pre-existing medical conditions
  - Main High risk Activity
  - Group travel and completion of Risk Assessment Form.

Segments

In the Segments tab, review all the necessary information relating to selected:
- Air
- Accommodation
- Car Hire and/or
- Rail.

Expense Summary

In the Expense Summary tab, review the allocation of travel Expenses.
To view the expense allocation details (BU/PG/Account Code), hover your mouse over the Allocation symbol. Alternatively, click on the Print/Email view and select UWA Request Printed Report.

Allocation of expenses including BU/PG/Account Code can be viewed from this print layout.

To view attachment, click on Attachments.
Use the **Send Back Request**, if you:
- **Require further information** from the traveller or
- **Declining** the travel request.

A **comment** must be provided to explain the reason for returning the request to the traveller.

Click on **OK** to send back your comments.

To Approve, click on the **Approve** button.
Delegating Approval

**Travel Approver** – You can nominate another Approver to review and handle travel approvals in your absence.

To select and nominate another Approver to act on your behalf, login to Concur and complete the following steps:

1. Go to **Profile** and click on **Profile Settings**.

2. On the left-hand side menu, click on **Request Delegates**.

3. To add a delegate, click on **Add**.

4. Search window will appear. Search or enter another approver employee ID.

5. Once a delegate is selected, the delegate’s name will be listed.

6. Tick the box for “Can Approve Temporary” and enter the date range of this delegation period.

7. To cancel a delegate, select the delegate’s name and click on **Delete**.

8. Click on **Save**.
Note:
If the “Can Approve Temporary” section is greyed out and not able for selection, this means the person you want to delegate your approval to is not currently an Approver in Concur. You will need to create an enquiry via AskUWA to request for the nominated person to be made available as a Temporary Approver Delegate.

To submit an enquiry via AskUWA, go to http://www.ask.uwa.edu.au/app/answers/list/

Example of AskUWA request to delegate Approval temporarily:

Direct my enquiry to: **Financial Services**

My enquiry is about: **Travel**

Subject: **Request for Temporary Approver Delegate**

Question:

I'll be away on leave from x/x/2016 to x/x/2016 and I would like to delegate my Travel Approval to xxxxx (staff ID 000123456). Please enable his access as a Temporary Approver during this period.