

Travel & Concur Training

January 9, 2024



Welcome, 2024!

Agenda

- Basics of UW travel program
- How to's:
 - Book – Concur or with agents
 - Administrative Groups
 - Combine Business and Personal Travel
- Concur demo
- What's new?
- Resources and Q&A



UWL Travel Management Contact

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Managed Travel Program Goals


- Provide Duty of Care and Travel Risk Management for students, faculty and staff who travel on University business
- Obtain best prices through consolidated spend
- Act as an intermediary with vendors to ensure a smooth travel experience



Travel Program Overview

- All travel is booked through [designated Agencies](#)
- Concur is an online booking tool that is managed by Travel Incorporated
- Travelers have the option
 - book with a UW specific consultant
 - book in Concur
- [TravelWise](#) – great resource
- [TravelWise Newsletter | Travel \(wisconsin.edu\)](#)



		
<p>Employee Services</p> <p>Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW</p> <ul style="list-style-type: none"> • Individual travel (employees, guests, students) • Administrative Groups 	<p>University Group Block Services</p> <p>Must be used for all groups of 10 or more where:</p> <ul style="list-style-type: none"> • Attendees are flying together on the same flight which requires direct agreements with the airlines to set up 	<p>NCAA Athletics Services</p> <p>Must be used for all NCAA related travel (individuals and groups)</p>
<p>Dedicated Team Business Hours: 7 am CST-8 pm CST Monday-Friday, excluding Holiday</p>	<p>Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>	<p>Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>

Links to information for:

[Travel Incorporated](#)

[Fox World Travel](#)

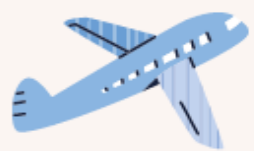




[Shorts Travel Management](#)



UWTravel**Wise**

BOOKING TRAVEL

Review the information below and consult with your supervisor to discuss the most logical method for your business trip. If you'd like further consultation, contact your campus travel manager.

TRAVEL TYPE	BOOKING METHOD OPTIONS	PRIMARY VENDORS*	NON-PAYABLE OR REIMBURSABLE
 AIR	<ul style="list-style-type: none">• CONCUR• UW TRAVEL AGENCY 	AMERICAN AIRLINES, DELTA, SOUTHWEST, UNITED	<ul style="list-style-type: none">• BOOKED DIRECTLY WITH AIRLINE OR• THIRD PARTY BOOKING SITES
CAR 	<ul style="list-style-type: none">• CONCUR• UW TRAVEL AGENCY• RENTAL AGENCY 	ENTERPRISE NATIONAL HERTZ (SECONDARY)	<ul style="list-style-type: none">• EXTRAS (I.E. GPS, FUEL SERVICE UPCHARGE)• VEHICLES LARGER THAN FULL SIZE (WITHOUT PROPER JUSTIFICATION)
LODGING	<ul style="list-style-type: none">• CONCUR• UW TRAVEL AGENCY• DIRECTLY WITH PROPERTY	PREFERRED HOTELS	<ul style="list-style-type: none">• BOOKED WITH 3RD PARTY ONLINE BOOKING SITE (I.E. HOTELS.COM)
 RAIL, UBER, LYFT TAXI, SHUTTLE	DIRECTLY WITH VENDOR	NONE	<ul style="list-style-type: none">• COST INEFFECTIVE USE OF SERVICE

*USE OF A PRIMARY VENDOR IS NOT REQUIRED FOR REIMBURSEMENT OF AIR OR LODGING EXPENSES. USE OF ENTERPRISE/NATIONAL OR HERTZ WITH UW CONTRACT IS REQUIRED FOR CAR RENTALS. SEE MORE ON [WISCONSIN.EDU/TRAVEL/BOOKING](https://www.wisconsin.edu/travel/booking)

Ways to make travel smoother

- Self-service options encouraged
 - ✓ Use Concur for booking
 - ✓ Use [Travel Inc Hub](#) for personal invoice retrieval
 - ✓ Download mobile apps for airlines, hotels, etc
 - ✓ Register for frequent flyer and hotel loyalty programs
- Consider alternate airports (Madison, Chicago, Minneapolis)
- Utilize Campus Travel Manager for assistance with policy, planning and booking questions
- Reconfirm flights
- Arrive at airport early



Policy Highlights - Air

- Must be booked with Designated Agency or in Concur to receive payment/reimbursement
 - ✓ Booking with third party sites, such as Expedia.com, or directly on airline site is not reimbursable
- Preferred vendors are Delta, ~~American Airlines~~, United, Southwest
 - ✓ Other airlines are allowed to be booked
- Airfare can be paid with either a University P-card or a personal credit card
- Basic Economy fares are not shown on Concur. Must be requested in order to book that fare class



Policy Highlights - Air



Notable Travel Policy Exceptions:

- ✓ International Flights with 8+ hours of consecutive airtime are eligible for Premium Economy seats
- ✓ Inter-Country flights purchased outside of the U.S. are exempt from Travel Inc. purchase mandate



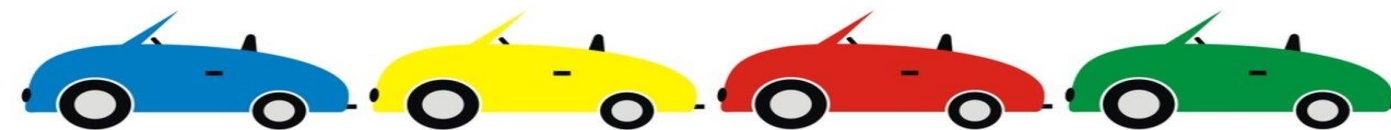


Policy Highlights - Hotel

- Best Practice: book with a Travel Inc consultant or in Concur
 - ✓ Exception: Conference hotels can be booked directly at the rate that the conference dictates
- Rates must be below the rate maximum, based on per-person
 - ✓ Verify max rate for your location via [Lodging and Per Diem Calculator](#)
- Preferred hotels should be used whenever available

Policy Highlights - Ground

- Must be an [authorized driver through Risk Management](#) to drive on University Business
- Car Rental Contracts:
 - ✓ Enterprise/National - Big Ten contract
 - ✓ Hertz
 - ✓ Book with a Travel Inc. Consultant or in Concur to get UW rates
 - ✓ Never accept extras such as fuel service, GPS, Roadside Assistance, etc - not reimbursable
 - ✓ Traveler is expected to refuel car prior to return –receipts required
 - ✓ Preferred is to book standard, able to book up to midsize SUV if needed



Mileage Reimbursement

When driving your personal vehicle for University-sponsored business, you will be reimbursed for mileage. MapQuest or Google Maps are the official tools for determining the most direct route. The following rates apply:

- Fewer than 100 miles roundtrip - Standard Rate
 - ✓ After 1/1/24: \$0.67 per mile
- More than 100 miles roundtrip - Turndown Rate
 - ✓ After 1/1/24: \$0.43 per mile



Individual Meal Per Diems

- [Per Diem](#) is an allowance provided for individual meals and incidentals. No receipts required
 - ✓ The amount varies by location
 - ✓ This is provided for any overnight travel
 - ✓ Important to include conference documentation in expense reporting to document provided meals
- Day Trip Allowance is \$15 (taxable) and provided for day trips
 - ✓ No receipts required



Tax Exemption

- [Wisconsin](#)
 - ✓ The Wisconsin sales and use tax provides an exemption from payment of state, county, and local tax.
 - ✓ Travelers seeking Wisconsin sales tax exemption for business lodging, meals, and vehicle rentals should present the Department of Revenue approved tax-exempt wallet card (***obtain your card from your institution's business office***)
- [Other States](#)
 - ✓ University of Wisconsin System may have various Sales and Use Tax Exemptions when making purchases other states. Review [UW TravelWise](#) for more details.
- If you are unable to receive an exemption, make note of reason on expense report



Combining Business and Personal Travel

Want to add some personal time to a business trip?

Drive to a far destination instead of fly?

After discussing with your supervisor, you may opt to add personal travel days on the beginning or end of your business trip. The University will only pay for costs associated with university sponsored travel. **Either the traveler's actual travel or comparison travel - whichever is less expensive – is payable/reimbursable.**

Cost Comparison is needed at time of booking

- Show date/time stamp if using Concur
- Obtain email from Travel Inc
- Attach to TER
 - **If Cost Comparison not obtained, Vice Chancellor approval needed**

[Combining Business and Personal Travel | Travel \(wisconsin.edu\)](https://www.wisconsin.edu/travel)



Administrative Groups

The [Administrative Group process](#) allows a host department to easily manage all department specific travel needs for students, guests or employees. The process allows the group administrator to either:

- Securely store a single University Purchasing Card on file with Travel Inc for agent reservations, or
- Set up the group for individual bill, where each traveler provides a personal credit card at the time of booking



Setting up an Admin Group

- Department arrangers must provide the following information and use the Travel Incorporated [UW Group Reservation Request Form](#) to submit the information
 - ✓ Travel dates/times can be pre-defined (this is not required if not yet known)
 - ✓ Fare allowance
 - ✓ Approval requirements
 - ✓ If you want the card on file to be used for hotel guarantee (hold reservations for traveler's own payment at check-out)
 - ✓ List of authorized users that are eligible to have their charges paid for via the card on file. This list may be modified as needed.

Once this process is complete, Travel Incorporated will provide the **Administrative Group Code** and contact information that must be given to and referenced by travelers or coordinators when booking under the established Administrative Group.

Important Note: *It will take up to 48 business hours to have the group set up internally.*



What is Concur

- the largest online booking tool used in North America
- the online booking tool utilized by the entire UW System
- the tool we use to house traveler profiles
- managed by our agency partner Travel, Inc
- Easily accessed through TravelWise with SSO

Concur is not...

- a travel agency
- a place you can call/email for travel assistance



Benefits of Using Concur

- 24/7 access with no after-hours charges
- No hold time
- Saves money (\$3.75 booking fee vs \$18 for agent)
- Live inventory

When Concur should not be used

- Complicated International Trips
- Multi-city/multi-segment trips
- Conference hotels
- Companion traveler
- Personal travel



UW TravelWise

Logins

Concur - Online Booking

E-Reimbursement

Lodging, Meals and Incidentals Per Diem Calculator

Travel Incorporated Portal

Shorts Travel Hub

Upcoming Events

Travel News

Rental Car Contract Changes

October 17, 2023

Concur two-factor authentication - Effective October 18th

October 11, 2023

UW/Southwest Sustainability Sweepstakes - Win Airfare

Contact

Travel Incorporated

Dedicated Agent

Hours: M-F 7 AM
to 8 PM CST

Phone: (877)
811-9898 or 470-
589-2205

Afterhours

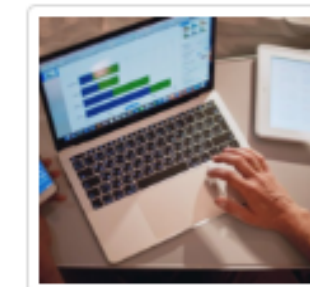
Emergency Support Available 24/7/365



All UW Agencies

Campus Travel Manager

-Policy Assistance
-Booking
Questions
-Reimbursement
Assistance
-Training
Opportunities



View by Institution

Concur Tips and Tricks

Adding a hotel or car to your trip

TRIP SEARCH

Booking for myself | Book for a guest

✈️ 🚗 🏠

WARNING: Holding multiple reservations for same routing or times or making multiple airline changes is considered an illegal booking practice by the airlines. This can result in additional fees billed to your credit card at a later date.

Flight Search

Round Trip | One Way | Multi City

From: ATW - Appleton Airport - Appleton, WI

To: Arrival city, airport or train station

Search

Show More

ALERTS

Tript creates a schedule with all your travel details in one place, ac...
Simply connect your Concur account to Tript. [Connect to Tript](#)

COMPANY NOTES

TRAVEL
incorporated

MY TRIPS (2)

SEP 25-29 Platteville-La Crosse

More

Travel Details

Important: If you are making a NEW reservation or CHANGING an existing one, be sure to complete your booking by following the prompts at the bottom of the page until you have reached the last page indicating you are finished.

TRIP OVERVIEW

I want to...

[Print Itinerary](#)
[E-mail Itinerary](#)
[Open in Outlook](#)
[View Trip History](#)
[Create Template](#)
[Clone Trip](#)
[Share Trip](#)
[Cancel Entire Trip](#)

Trip Name: [Platteville-La Crosse](#)

Start Date: September 25, 2022

End Date: September 29, 2022

Created: July 18, 2022, Jesse Funk (Modified: September 02, 2022)

Description: (No Description Available) [Go](#)

Traveler Type: Employee

Agency Record Locator: 4FYNHL

Reservation for: Jesse Robert Funk

Total Estimated Cost: [\\$242.24 USD](#)

Add to your Itinerary

[Car](#) [Hotel](#)

RESERVATIONS

Sunday, September 25, 2022



National Car Rental at: Appleton US (ATW)

[Change](#) | [Cancel](#)

Pick-up at: Appleton US (ATW)

Pick Up: 06:00 PM Sun Sep 25

Pick-up at: Appleton US (ATW)

Number of Cars: 1

Confirmation: 1639349937EXCNT

Status: [Confirmed](#)

Frequent Guest Number: 381368014

Rate Code: 00331

Return: 07:00 PM Thu Sep 29

Returning to: Appleton US (ATW)

Additional Details

Rate: \$39.00 USD daily rate, unlimited; \$39.00 USD extra daily rate, unlimited; \$17.00 USD extra hourly rate, unlimited
Total Rate: \$242.24 USD

Corporate Discount: X278808

Rental Details

Standard / Car / Automatic transmission / Air conditioning



[Add to your Itinerary](#)

TOTAL ESTIMATED COST

Car:	\$242.24 USD
Total Estimated Cost:	\$242.24 USD

Concur Tips and Tricks

Identifying rate changes during a hotel stay

TRIP SUMMARY

Select a Hotel

Nights: 3
New York, New York

Check-in: Sun, 10/09/2022
Check-out: Wed, 10/12/2022

Finalize Trip

Concur displays live hotel inventory that includes public rate and rates specific to the UW Policy Highlights

- UW has negotiated rates with hotels near all UW campuses and select Universities and they are marked as "Most Preferred"
- Travel Policy rules will alert users when rates are over the maximum for the location and dates of travel.

New Travel Management Company/New Process! Please ignore the Concur pre-populated per diem rates.

Need technical assistance?
Call TI Online Technical Support - 866-738-6444

CHECK-IN SUN, OCT 9 - CHECK-OUT WED, OCT 12

Show as USD

Change Search

New Travel Management Company/New Process!

When searching for a hotel please ignore the Concur pre-populated per diem rates page.

The University's per diem rates are available at: [University Per Diem Rates](#) and will be automatically applied to your Concur search results.

Check-in Date: 10/09/2022
Check-out Date: 10/12/2022

Search within 5 miles from

☐ Airport ☐ Address ☒ Reference Point / Zip Code

Reference Point / Zip Code (e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')
New York, New York

Only show results containing

Company Preferred Accommodation

Lodging Per Diem limit for New York -- New York County: \$286.00

Name Search Sorted By: UW Custom Sort

Displaying: 100 out of 100 results.

Previous 1 2 3 4 Next All

1. Radisson Wall Street
52 William St, New York, NY 10005 Map it

0.45 miles ★★★★★

Preferred Hotel for Wisconsin Universities

Hotel details

\$329

View Rooms

2. Club Quarters, World Trade Center
140 Washington St, New York, NY 10005 Map it

0.46 miles ★★★★★

Preferred Hotel for Wisconsin Universities

Hotel details

\$345

View Rooms

1. Radisson Wall Street
52 William St, New York, NY 10005 Map it

0.45 miles ★★★★★

Preferred Hotel for Wisconsin Universities

Hotel details

Hotel offers UW System negotiated rates at or below UW maximums for location based upon availability. Blackout Dates may apply, please view the UW System Hotel Directory on UW TravelWise for more details.

Room Options

Uw Systems Free High Speed Internet Access Queen Bed-non Smoking Please cancel 2 days before arrival (Worldspan) **\$329**

[Rules and cancellation policy](#)

Travel Inc Travel Hotel Program Free High Speed Internet Access-loyalty Points Queen Bed-non Smoking Please cancel 2 days before arrival (Worldspan) **\$348**

[Rules and cancellation policy](#)

Rules and cancellation policy

RADISSON WALL STREET

Important information:

RATE CHANGES OVER DURATION OF STAY

Hotel Rates

194.65 USD PER NIGHT STARTING 09 OCT FOR 1 NIGHT
245.65 USD PER NIGHT STARTING 10 OCT FOR 1 NIGHT
328.95 USD PER NIGHT STARTING 11 OCT FOR 1 NIGHT

ROOM RATE DETAIL: ALL KNOWN TAXES/FEEES/SURCHARGES

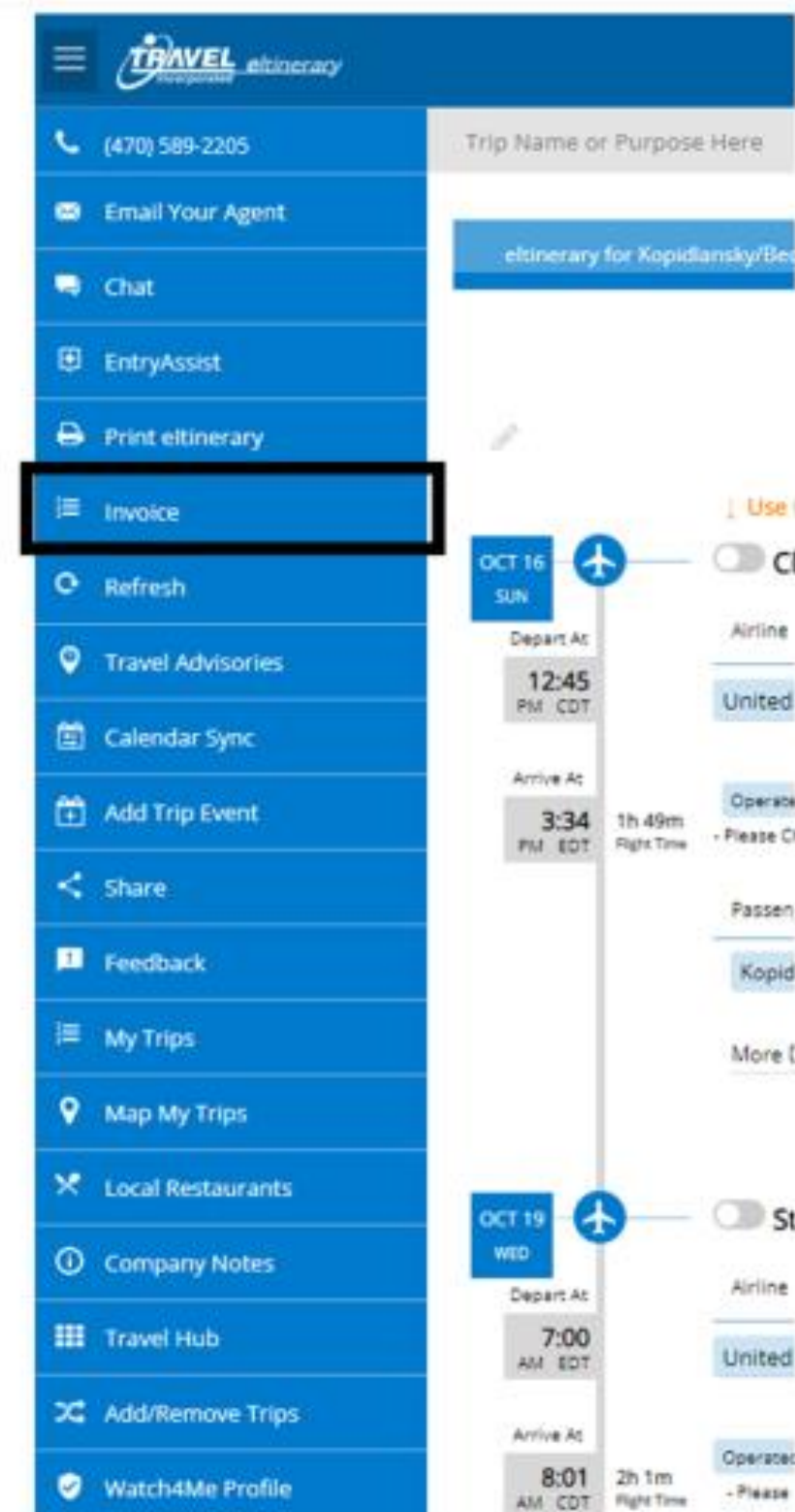
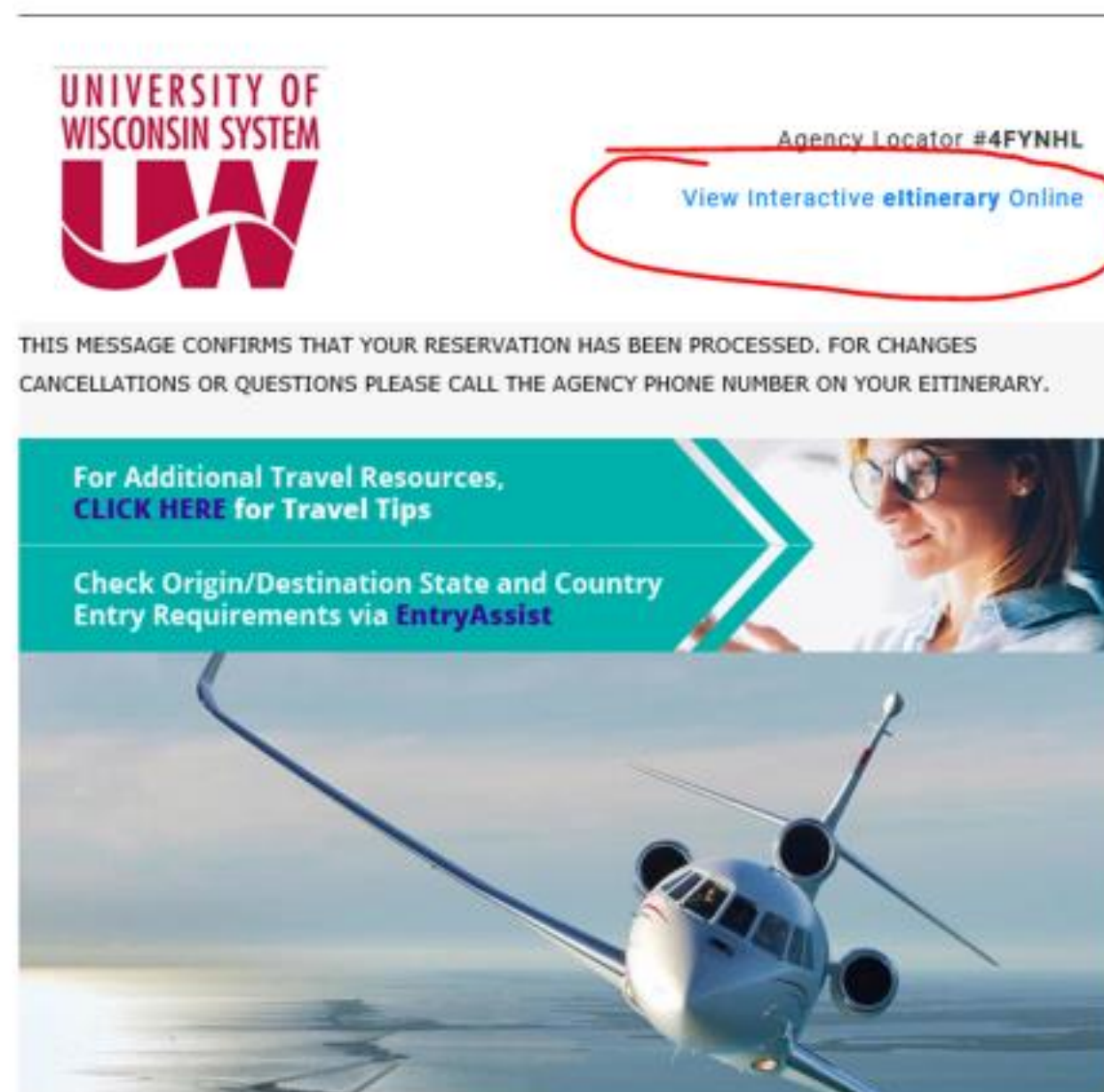
8.88 PERCENT STATE/PROV TAX PER NT
5.88 PERCENT CITY TAX PER NT
3.50 USD SERVICE CHARGE PER NT
123.97 USD TOTAL TAX/SURCH/FEE
893.22 USD TOTAL AMOUNT OF STAY

CANCEL BY 1600 07OCT2022 NO CHARGE

THIS MESSAGE CONFIRMS THAT YOUR RESERVATION HAS BEEN PROCESSED. FOR CHANGES
CANCELLATIONS OR QUESTIONS PLEASE CALL THE AGENCY PHONE NUMBER ON YOUR ITINERARY.

Concur Tips and Tricks

Initial Itinerary (Concur) vs Invoice Email (Travel, Inc)



What's new?

- New Enterprise/National Big 10 contract
 - Rates have increased and \$5 surcharge WI airports
 - Leisure use contract revised [Personal Use Contracts | Travel \(wisconsin.edu\)](https://www.wisconsin.edu/Personal-Use-Contracts-Travel)
 - More fees for student renters
 - Hertz also primary
- Concur SSO
- American Airlines no longer preferred
- Workday changes, summer 2025
 - First/last day per diem adjustments
 - Raising required receipt amount
 - Missing cost comparison – 80% reimbursement



- [UW TravelWise Website](#)
- [E-Reimbursement Login](#)
- [Policies](#)
- [Resources/Forms](#)
- [UWL travel website](#)
- [Newsletter Sign Up](#)
- [Concur Login](#) & Demo
- [Per Diem Calculator](#)



Q&A

Thank you!

