UTravel is the new paperless and mobile system for University of Utah Travel that will increase efficiency in the reimbursement process, decrease paper waste across campus, and take care of booking needs. Use this guide to gain a better understanding of the system, manage your profile, and book trips.

**Sign In**

1. Go to [http://utravel.utah.edu](http://utravel.utah.edu)
2. Currently, UTravel is only set up for University of Utah employees. Your User Name will be your UNID @ utah.edu (ex: u1234567@utah.edu) and your Password will be the same as your CIS password.
3. If your screen doesn't look like the image below – you have not been given access yet. Please contact the Travel office if you feel you should have access.
4. Access will be given after completion of training and will take at least 48 hours to be activated.

**Home Page**

1. **Profile** - Your profile houses all of your information for using UTravel. Every concur user needs to update their profile. This can also be done by the Travel Arranger, except the email verification.
2. **My Tasks** - Shows your available expenses, open reports, and approvals requiring attention.
3. **Company Notes** - Where you will find any pertinent information from your organization.
4. **Request Tab** - Where you will begin your travel process and acquire a Request ID.
5. **Travel Tab** - Where you will book domestic employee flights, cars, and hotels.
6. **Expense Tab** - Where you will create your expense reports for reimbursement.
7. **Approvals Tab** - This section is given to those that are approvers, in which they will have pending approvals.
8. **App Center** - Where you can link apps to your Concur profile for a more optimized experience.

Areas of information included on the home page:

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Profile
Your UTravel Profile stores your personal information used for booking travel and creating expense reports.

Before you begin using UTravel it is important to update your personal information to ensure accuracy when booking travel and activating Concur features.

Key Features:

1. **Name**: Make sure your name matches your government issued ID or passport. The name will transfer to travel bookings made in the UTravel Concur or the travel agency. Your first and last name is populated from your HR record. If your name is incorrect, contact your HR representative to update.

2. **Address**: Recommended for easier mileage calculations in Expense.

3. **Phone Contact**: A work and home phone number are required. Registering a mobile device is not required but recommended to take advantage of Concurs mobile technology and electronic receipts along with Duty of Care.

4. **Email Address**: You will need to verify your email address to upload receipts and itineraries to the system. Your **Email 1 email address must be your UNID@utah.edu email address**. To verify – select Verify and enter the code that was sent to your email.

   Once verified you can email receipts to **receipts@concur.com** and they will be available for you to add to your expense reports.

5. **Assistants and Travel Arrangers**: This is where someone can designate an Arranger to book travel or become the designated Booking Assistant. A Traveler can have multiple Arrangers.

6. **Credit Card**: A personal credit card is required if you chose to book a hotel through UTravel. The account will not be charged and is only used to reserve/guarantee the room.

7. **E-Receipt Activation**: This feature allows the auto collection for electronic receipts into the Concur system from Concur participating suppliers. To activate go to Profile, Other Settings and select E-Receipt Activation.

8. **Expense Delegate**: These are individuals who have been assigned to do certain tasks on your behalf. Users are allowed to assign **temporary delegates** here. Please contact the Travel office to assign or change **permanent delegates**.
**Apps**
Proper use of apps will optimize features of the UTravel system.

**Concur Mobile App**
The Concur Mobile app allows you to manage your expenses in easy, paperless fashion. You can capture images of your receipts and they will automatically appear in your Expense Report.

1. To register for Concur Mobile, log in to UTravel and select your *Profile* menu in the upper right corner of your screen and click *Profile Settings*. Then, select *Mobile Registration* along the top.

2. Create a PIN in order to log in to Concur Mobile - click the *Create a Concur Mobile PIN* link and follow directions to set your PIN.

3. Download the **Concur Mobile app** onto your mobile device.
   - You can do this through your device's app store.
   - Or, you can send an app link to your device - Use the Download the App to enter your mobile phone number or email address and click Get Started.

4. To use the Concur Mobile app, open the app on your phone and log in with your Concur Username (this is your UNID@utah.edu address) and the PIN you just created.
5. Your responsibility as a traveler is to take photos of your receipts using the ExpenseIt icon within the app.

6. After you have taken the picture of the receipt, the Concur app begins to analyze.

   Once the analysis has completed, the type of expense, vendor name, amount, and date will display.
TripIt Pro is an application that comes free with your Concur account (Usually $59.99/yr). It is used to keep track of your upcoming trips and help travelers stay one step ahead with real-time flight alerts, gate change notifications, reward program tracking, monitoring for availability of preferred seats, and VIP benefits.

You can register for TripIt through the App Center tab at the top of the page, or by downloading the app to your smartphone through the app store.

You will need to download the app to your smartphone in order to use TripIt.

If you already have TripIt, you will need to link it to your unid@utah.edu account.

Levels of Approval
The levels of approval will be determined by your ADSC (Account Distribution Shortcut “Activity or Project number”).

- Level 0 is the Org Head of the activity or project selected.
- Level 1 is one level higher than the Org Head.
  - Level 1 is equivalent to a Dean, Director, or Chair.
- Level 2 is two levels higher than the Org Head.
  - Level 2 is equivalent to a Vice President.
- Account Executives are responsible for expenses on Activities and Projects.
- Org Heads are responsible for ALL Activities and Projects that report to their org.
Request

In the past, registering a trip and obtaining a Travel Number was the first travel step, which included an audit fee. Now, you will obtain a Request ID with no audit fee applied until submission of the Expense Report (reimbursement).

Please pay close attention to this section. Here is a simple breakdown of how to decide which option to choose:

1. **Request/Trip Name** - Create a Trip Name for the traveler that is recognizable, up to 32 characters.
2. **Register Trips in Advance** - For **domestic trips**, Requests need to be made **at least 1 day in advance**. For **international trips**, they need to be made **at least 21 days in advance**. Level 1 approval is required if advance request was not approved properly.
3. **Destination Country** - Risk levels range from 1-5. Risk level 1 = low risk. Registering trips to areas of the world that are a risk level 4 or higher will be sent directly to the office of Global Engagement via UTravel for approval. University travelers may not be allowed to travel to anywhere with a risk level 4 or above.
4. **Traveler Type** - Employee only, non-employee coming soon.
5. **How will you book your travel** - How air, car, and/or hotel is booked. See next section for more details.
6. **ADSC - Account Distribution Shortcut** (Activity, Project, or ORG).
7. **Cash Advance** - Cash advances only require a supervisor approval, and the request routes to them for approval.

**How will you book your travel?**

Please pay close attention to this section. Here is a simple breakdown of how to decide which option to choose:

1. You will use UTravel to book your trip after you receive your Request ID. **This will be the most common choice.**
2. You will use the onsite agency to book, either through phone or the online forms on the onsite agency website.
3. You will use another booking method other than UTravel or the OnSite Agents. Penalties apply with this option ($10/Domestic, $20/International).
4. You will be driving over 100 miles one-way or overnight. Trips less than 100 miles should be done in ePR.
5. You have started on the Travel tab in UTravel or onsite agency and need to obtain your Request ID.
6. Paid by an outside entity, and there will not be an expense report filed with the University of Utah to assist with Duty of Care.
Once you have completed all of the required fields underneath the Request Header tab, proceed by clicking on the **Segments** tab, and then select an icon appropriate to your trip (airplane, car, bed, etc).

You will need to complete the required fields with **estimates only**.

**Segments**

System requires only **one** segment and estimate.

Once everything is complete, click Submit Request near the upper right corner of the page.

This will generate your 4-digit alphanumeric Request ID.
Booking Travel

UTravel is set up to book single-traveler, domestic trips only.

The University of Utah is contracted with Christopherson Business Travel (CBT) to assist with travel arrangements.

CBT offers 24 hour travel assistance, with a designated Travel Advisor team.

The University has a contract with Delta, which gives a 2-10% discount, in addition to the state contract fare that is refundable and changeable.
Employee Travel Booking in UTravel

If you’re booking the trip for someone else, make sure they’ve given you approval in their profile under the Assistants and Travel Arrangers section. You will know you have access if there is a green check next to your name.

Can book travel? ☑

To act as a Travel Arranger, click Profile in the upper right corner of the screen, and select the person you wish to book for from the Acting on behalf other user drop-down. Click Start Session – you’ll see the name of the person you’re arranging travel for display on the home page. Follow these instructions if you are starting in Request.

1. After the Request has been submitted and approved, begin with the Book link under the Request tab in the Action column.

2. After viewing your Booking Summary, click Proceed to Booking.

3. Select your flights

   - Use the controls on the left to modify your search.
   - Use the matrix at the top of your screen to narrow down results.
   - Click View Fares next to each flight you wish to book, and you’ll be able to see the price
   - Click on the fare to proceed with booking your flights. You’ll be taken to a new page to review booking details and reserve.

4. Verify the information on this page is correct. If you decide to change your flights, click Back. If you’re ready to proceed, click Reserve Flight and Continue.

5. Verify Travel Details and add Car/Hotel if needed. Scroll to the bottom and click Next.

6. Trip Booking Information - leave any necessary comments for the Travel Agent. Click Next to proceed to Trip Confirmation. THE TICKET IS NOT BOOKED YET.

7. Trip Confirmation - to complete the booking, click on the Confirm Booking button at the bottom of the page.
8. Upon successful ticketing, an itinerary will be emailed to the traveler, and any designated Travel Arrangers within 24 hours with the wording ELECTRONIC TICKET HAS BEEN ISSUED ** TICKETED RESERVATION. The ticket number will also be listed in the bottom of the itinerary with the price and form of payment.

   - If you do not receive an itinerary back from the travel agency within 24 hours, something went wrong. Please contact the onsite agency at 801-585-9005 or travel@admin.utah.edu. It is the arranger/travelers responsibility to make sure this itinerary is received.

9. If airfare is not required, and you just need to book a rental car or hotel, go back to the Home Page and proceed to those sections.

If you chose **UTravel Start with Travel** under *How will you book your travel?* in Request, follow these directions:

1. Use the Flight Search box to refine search criteria.
   - You can restrict your flight search by changing the dropdowns for your depart and return (+/- # of hours).
   - If you want to search for a rental car or a hotel after your flight search, check the boxes for Pick-up/Drop-off car at airport and/or Find a Hotel. Or you can use the designated tabs, later, to book a car or lodging.
   - The Search by dropdown defaults to sort by Price. You can change to sort by Schedule first -- or you can keep the Price default and compare fares later.

2. Click Search and wait for your results to fully load.
   - Use the controls on the left to modify your search.
   - Use the matrix at the top of your screen to narrow down results.
   - Click Select next to each flight you wish to book, and you’ll be able to see the price
   - Click on the fare to proceed with booking your flights. You’ll be taken to a new page to review booking details and reserve.

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7. Manage Requests - Complete the Request ID process, see page 6 for more details.

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9. If airfare is not required, and you just need to book a rental car or hotel, click the Travel tab and proceed to those sections in the Flight Search box.
Employee + Guest Booking
If you are bringing an additional guest, visit fbs.admin.utah.edu/travel/agency and select the Book a Trip form. Additional travelers cannot be booked in the UTravel system.

Please note – if the travel has high status frequent flyer membership and wants to bring an additional traveler and would like that person to receive their frequent flyer benefits, they must be booked under the same airline confirmation number. UTravel users use onsite agent process.

Personal Travel Booking
Not allowed in UTravel. Contact travel@admin.utah.edu for assistance.

Group Travel Booking
Group Travel is defined as 10+ travelers on the same itinerary and is done on the group leader’s profile.

On Request, select booking option 2, “Group” trip type, and “Group” traveler type. Booking process will follow middle column on page 8 of this guide.

Guest/Affiliate Travel Booking
Coming soon to UTravel System. Please use old process (Legacy Travel System) to register the trip, or contact a Travel Advisor at travel@admin.utah.edu for assistance.

Form of Payment for Airline Tickets
Airline tickets booked using UTravel are billed to the University credit card. Personal credit cards are not allowed. Please use the UTravel forms at fbs.admin.utah.edu/travel/agency for personal credit card requests or contact a Travel Advisor at travel@admin.utah.edu for assistance.

Change a Trip, Airline Tickets, Car, or Hotel
Airline Tickets - Once a request is approved and travel is confirmed/ticketed, the traveler must contact the travel agency to make any changes - travel@admin.utah.edu.

Car & Hotel changes can be made in the Booking tool. CBT Travel Advisors are available to help if necessary.

All change fees and fare differences for changes are billed to the original form of payment.

Hotel
Conference hotel rates are not listed in Concur. Those will still have to be booked directly through the conference’s process. Please use the tool to compare the listed rates with the conference pricing.

Other discount rates are viewable in the tool, such as: AAA, Government, hotel membership rewards, and Christopherson Business Travel discounts.

Car
The University of Utah contracts with Enterprise, National, and Hertz, and bookings must be made through UTravel or the Onsite Agency. These are the preferred vendors for booking cars, if you wish to book outside of these vendors, there will be a $3/day insurance surcharge automatically billed to the department.
Expense

In the past, at the closure of a trip you would create a final reimbursement. Now, you will create an expense request. This is done using the Expense link under the Request tab (in the Action column) for the appropriate trip.

UTravel will automatically add your flight to your expense report once it is booked, as well as any other E-receipts. You will also be able to upload any receipts via your computer or mobile device with the Concur app. The Concur app and the Expense tool will automatically convert foreign receipts to USD.

Expense reporting begins with the meal per diem question:

University policy is changing to only reimburse meal per diem. In the past, travelers were allowed to include actual meal receipts, but that has changed. Travelers can still submit Business Meals for reimbursement.

Per diem is based upon dates, times, and locations from the itinerary. Traveler can select Import Itinerary which can bring the trip dates, times and destinations from the flights, car and hotel reservations. If those are not there, they must fill the box below with that information.
Once you have clicked Import Itinerary, the box below will display. Select the appropriate itinerary and click Import.

Continue with the verification process by reviewing the information presented by clicking **Next** on each window. Then select the meals that need to be deducted from the total per diem calculation.

Once that is complete, select **Create Expenses** and this will populate the Expense Report.

![Travel Allowances For Report: Salt Lake City to San Diego](image)

**You can “exclude” All for personal days**
There are various ways to get receipts onto the Expense Report:

1. Click **New Expense**, Select **Expense Type**, fill out required fields (marked in red) and ‘Attach Receipt’

![New Expense Interface]

2. Select **Available Receipts**

![Available Receipts]

3. Click **Browse** to navigate to the receipt that is saved on the computer

![Receipt Upload]

"For best results, scan images in black & white with a resolution of 300 DPI or lower. Click Browse and select a .png, .jpg, .jpeg, .pdf, or .tif file for upload. 5 MB limit per file. For best results, scan images in black & white with a resolution of 300 DPI or lower. No Receipt? Create a missing Receipt Affidavit here."
Allocating Expenses

There are two ways you may Allocate Expenses:

1. Allocate by clicking the desired expenses then click Allocate.

2. Select an expense and on the bottom right of the Expense select Allocate.

Once you have selected either option it will take you to the following page:

You may either Allocate by Percentage or Expense and add as many New Allocations as needed.

Allocations may be saved for future use.
4. Upload available receipts that you have saved on your desktop

Available Receipts

5. Import Expenses that are available. Select the expenses you desire to add to the report and click the Move drop down, select to current report. These expenses are from E-Receipts and receipts that were captured with the Concur mobile app.

Personal Mileage
To add personal Mileage, select Personal Car Mileage under Expense Type and use the Mileage Calculator found in the bottom right portion of the screen.
If a ! displays on an Expense Report, you will need to fix the exception, before submitting.

We require that you itemize your room rate and tax on the hotel receipt. If there are additional charges on the hotel receipt, you will need to itemize them.

If a traveler had personal days on their hotel receipt, select the day(s), click edit:
Once the Expense Report has been submitted, it goes into the following workflow:

1. **Budget approver** (activity or project) For every expense report
2. **Central Administration** (For every expense report)
3. **Supervisor** (For every expense report)
4. **Level 1** (if necessary) Business Meals/Entertainment. Advanced Request violation for domestic trip, out of pocket airfare.
5. **Level 2** (if necessary) Exception to policy/rules. Over $10,000 and advanced Request violation for international trip

After the last approver, the reimbursement will be submitted to PeopleSoft for approval. The reimbursement will be sent ACH (Direct Deposit) or check depending on how the employee is set up in PeopleSoft.

Select **personal non-reimbursable**, and the amount will not be reimbursed to the traveler.

The Expense Report can be printed or emailed by clicking the **Print/Email** link.
## Fees

There are UTravel fees depending on which type of trip you are booking, and they apply to each Expense Report generated.

### Legacy Travel System

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>$8</td>
<td>Driving $15</td>
</tr>
<tr>
<td>$12</td>
<td>Domestic Flight $25</td>
</tr>
<tr>
<td>$20</td>
<td>International Flight $35</td>
</tr>
</tbody>
</table>

### Booking

<table>
<thead>
<tr>
<th>By Size</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>$30</td>
<td>Exchange (All Fares) $30</td>
</tr>
<tr>
<td>$0</td>
<td>Domestic Flight $0</td>
</tr>
<tr>
<td>$30</td>
<td>International Flight $0</td>
</tr>
<tr>
<td>By Size</td>
<td>Group $50*/$100**</td>
</tr>
<tr>
<td>$12*/$30***</td>
<td>Personal/Leisure $12*/$30***</td>
</tr>
<tr>
<td>$30</td>
<td>State Issued Ticket $0</td>
</tr>
<tr>
<td>Other Booking Method</td>
<td>$10*/$20***</td>
</tr>
</tbody>
</table>

*Domestic  **International