

## What's New . . .

May, 2010

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### June Business Managers' Meeting

The next Business Managers' meeting will be held on Thursday, June 10th, in Lecture Hall 3 of the Med. School (in Schwitalla Hall) from 9:00 am – 10:30 am. To view a schedule of the upcoming Business Manager meetings click [here](#).

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### Messages from CPC

**Concur Expense Updates** - In *Concur Expense*, on the report header, the *BUSINESS PURPOSE* is a mandatory field. Please make this a meaningful description for anyone who may be reviewing the report. A couple examples are: Baseball team tournament 5/2/2010 and SGA Conference 4/1-4/2010.

### **Frequently Asked Questions About the Itinerary for Travel Expense Reports:**

#### **1. When I try to create an itinerary I get the error: "Adding this row would cause this itinerary to overlap with another of your itineraries" What does this error mean?**

- This means that an itinerary with these dates ALREADY exists. To view your itineraries, click on Details – Available Itineraries.
- When the itinerary appears, look for the itinerary you want in the lower portion of the window.
- If you don't see the itinerary, use the drop down menu to choose a different time frame. Once you see the itinerary you want, highlight it and then click Assign. This will assign the itinerary to the report you are currently in.
- Once assigned, the itinerary will move into the upper half of the window.
- If the itinerary needs to be edited (dates, times, or cities updated) highlight and click edit. This will bring you into edit mode to make changes.

\*Remember – every itinerary needs at least TWO lines (departing and returning) to be valid.

\*\*The meal selection can NOT be changed once an itinerary is created. If the itinerary has not been submitted on a prior report, the itinerary can be deleted and then recreated, this time choosing USGA No Meal Receipt for the 60% meal per diem option.

#### **2. How can I delete an itinerary?**

- To view your itineraries, click on Details – Available Itineraries.
- When the itinerary appears, look for the itinerary you want in the lower portion of the window.
- If you don't see the itinerary, use the drop down menu to choose a different time frame. Once you see the itinerary you want, highlight it and click delete.

\*If the itinerary has a lock icon by it, it has already been attached to a report that was submitted and can NOT be deleted.

#### **3. I don't know how to get the 60% fixed meal expense lines in my report. How can I do this?**

- When you choose the USGA No Meal Receipt option and create/import your itinerary, a fourth tab will appear – Expenses & Adjustments
- When you click on the Expenses & Adjustments tab you will see a list of the dates included on the itinerary.
- Check mark the box next to any days you do NOT want to receive the 60% per diem (personal/vacation days etc).

- Once days are selected (or not) click on the Update Expenses button in the lower right corner. The system will drop in a Fixed Meal expense line for 60% of the per diem from the dates and city entered on the itinerary.
- There will be a hard stop for each Fixed Meal expense line. In each line type in 60% in the vendor field and save. You can copy and paste from one line into the other lines.

### **Profile Setup**

A weekly upload to Concur/Cliqbook adds new employees, but does NOT give them actual access to the tools. A department approver needs to send additional information to have a profile set up, give the employee roles in Expense and/or Cliqbook, and have info (travel - manager role, dept, phone number, manager email) added. When an employee changes departments, updates are made to their current accesses.

Emerald Club number should be entered in your Cliqbook profile under both Enterprise car and National car.