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Reconciling Travel with Concur [1]

General information on how to travel is available on the Travel Page, including the Travel Overview. Refer to the Quick Reference Guide The Expense Report Process[2] for a graphic overview of the expense report process from start to finish.

Reconciling a cash advance?

The Step-by-Step Guide Reconciling Cash Advances (found under Step 2) will help you through the process.

Step 1 - Creating the Expense Report

Creating the Expense Report [3]

Step 2 - Adding Expenses

Many types of travel expenses can be on one expense report. Use the guides below for each type of travel expense on your report.

Video: Adding Attendees to Official Function Expenses [4]

Reconciling Cash Advances [5]

Step 2a - Overview of Adding Expenses [6]

Step 2b - Adding Travel Card Expenses [7]

Step 2c - Adding Out-of-Pocket Expenses [8]

Step 2d - Adding Lodging Expenses [9]

- Video: Adding Lodging to Expense Reports [10]

Step 2e - Adding Mileage Expenses [11]

- Video: Adding Mileage to Expense Reports [12]

Step 2f - Adding Per Diem (Fixed Meal) Expenses [13]

- Video: Adding Per Diem to Expense Reports by Importing Itineraries [14]
- Video: Adding Per Diem to Expense Reports by Creating Itineraries [15] - New
- Video: When the Travel Card is Used to Pay for Travel Meals [16] - New

Video: Determining Reimbursement Amounts [17] ? New

Step 3 - Allocating Expenses

- Allocating Expenses [18]
- Video: Allocating Expenses [19]

Step 4 - Attaching Documents

Step 4a - Attaching Documents Using the Available Receipts Area [20]

Step 4b - Attaching Documents by Scan [21]

Step 4c - Attaching Documents by Fax [22]

Delegates: Emailing Receipts to the Available Receipt Area [23]

Want to go mobile with Concur?

Access Concur from your mobile device with Concur Mobile. You can also organize all aspects of your travel with TripIt Pro.

It's easy! Find out how ? [24]

Step 5 - Setting the Approval Flow

Setting the Approval Flow [25]

Step 5a - Determining Reimbursement Amounts

Determining Reimbursement Amounts [26]

- Video: Determining Reimbursement Amounts [17] - New

Video: When the Travel Card is Used to Pay for Travel Meals [16] - New

Step 6 - Submitting Expense Reports

Submitting Expense Reports [27]

Did you take the online travel courses?

- There are online courses available that guide you through the travel process.
- After completing the online courses, customized in-person training can be requested to suit your department's needs.

Learn about these online courses ? [28] Learn about in-person training ? [29]

Source URL: http://www.cu.edu/psc/reconciling-travel-concur

Links:
[1] http://www.cu.edu/psc/reconciling-travel-concur
[2] http://www.cu.edu/psc/policies/concur-expense-report-process
[3] http://www.cu.edu/psc/training/creating-expense-report
[4] http://www.cu.edu/adding-attendees-official-function-expenses
[5] http://www.cu.edu/psc/training/reconciling-cash-advances
[6] http://www.cu.edu/psc/training/step-2a-overview-adding-expenses
[7] http://www.cu.edu/psc/training/travel-reconciliation-expense-report-step-2-b-%E2%80%93-adding-travel-card-expenses
[8] http://www.cu.edu/psc/training/step-2c-adding-out-pocket-expenses
[9] http://www.cu.edu/psc/training/step-2d-adding-lodging-expenses
[10] http://www.cu.edu/psc/adding-lodging-expense-reports
[11] http://www.cu.edu/psc/training/step-2e-adding-mileage-expenses
[12] http://www.cu.edu/psc/adding-mileage-expense-reports
[13] http://www.cu.edu/psc/training/step-2f-adding-diem-fixed-meal-expenses
[14] http://www.cu.edu/psc/adding-diem-expense-reports-importing-itineraries
[15] http://www.cu.edu/psc/adding-diem-expense-reports-creating-itineraries-0
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