The Home Page

The home page is your first view of the Concur Travel & Expense System after logging in via your campus portal. It is where you will begin booking official university employee travel, requesting cash advances, and reconciling Procurement Card and travel expenses.

There are seven areas of information included on the home page: Travel Info, Company Info, Trip Search, Active Work, Trip List, Available Company Card Charges, and Approval Queue. (***Note:*** The above image doesn't show every area.)

> You can rearrange the order of your areas by placing your cursor on the section heading (such as for Approval Queue), holding down your left mouse button, and dragging the area to the desired location.

Travel Info on the home page…

The Travel Info area contains announcements relating to travel within Concur – including how to contact Christopherson Business Travel, the University's approved travel agency.

Travel Info

Welcome to Concur Travel, the online travel tool for University of Colorado.
Please take a moment to review your profile and ensure that your information is complete.
For questions regarding travel reservations or changes to an itinerary, contact Christopherson Business Travel at (855) 462-8885.
  • **Hours:** 7:00 AM to 5:30 PM Mountain, Monday - Friday
  • **Emergency After Hours Service:** 800-787-2390 (Must reference service code AI79 after 5:30pm & Weekends)
  • **International After Hours Service - Call Collect:** 682-233-1914(Give ID Code P-JOO: the letter "O" not zero)

For questions regarding Concur Travel, please contact Christopherson's Online Travel Support Center:

  • **Hours:** 7:00 AM - 6:00 PM Mountain, Monday - Friday: 888-535-0179
  • **Online Support:** email: OnlineTravelSupport@CBTravel.com

Company Info on the home page…

The Company Info area contains three sections of information:

- The **Expense System News** section contains announcements relating to Concur
- The **Finance and Procurement Help Desk** section contains contact information for Concur-related help

Company Info

Expense System News

Are you using TripIt Pro for your personal travel?
If so, don't forget to mark those trips as "leisure" within the TripIt website so they don't appear in Concur. Refer to the Quick Reference Guide Using TripIt Pro & the TripIt Pro Mobile App for details.

Finance and Procurement Help Desk
FinProHelp@cu.edu
303.837.2161

Chat closed. Leave a Message.

Useful Links:
  • Concur Travel & Expense System Learning Resources
  • Delegate Authorization Form
  • Travel Arranger Form

- The **Useful Links** section contains links to university-specific learning resources for many processes within Concur, as well as other Concur-related documents

Trip Search
Plan your flight, car and hotel:
e.g. flight from JFK to Paris on Tuesday   [Search]

Flight | Car | Hotel | Flight Status
  ◉ Round Trip ○ One Way ○ Multi-Segment

Departure City
Find an airport | Select multiple airports
Arrival City
Find an airport | Select multiple airports

Departure
[depart ∨] [Morning ∨] [± 4 ∨]
Return
[depart ∨] [Afternoon ∨] [± 4 ∨]

☐ Pick-up/Drop-off car at airport
☐ Find a Hotel

☐ Specify airline
Class of Service: [Economy class ∨]

Search flights by: ◉ Price ○ Schedule
Flights w/ no double connections: ☑
[Search]

Trip Search on the home page…

The Trip Search area is where you book your airfare, rental car, and/or hotel stay for an upcoming university trip through Concur. Refer to the Step-by-Step Guide Booking Trips in Concur Travel for additional information.

Active Work on the home page…

The Active Work area contains two processes in Concur: cash advance requests and expense reports (for both travel

and Procurement Card reconciliation). A list will appear containing all active expense reports and cash advance requests, including their status (submitted, sent back to employee, pending approval, etc.).

Expense reports that have been paid, and cash advance requests that have been approved, will continue to appear for several weeks. Once they disappear from the Active Work area, they can still be accessed by clicking **View Reports** or **View Cash Advances**.

Available Company Card Charges on the home page…

The Available Company Card Charges area contains every Procurement Card and Travel Card transaction that has yet to be assigned to an expense report.

Trip List on the home page…

The Trip List area contains your upcoming and recently completed trips booked through Concur or Christopherson Business

Travel. Once they disappear from the Trip List area, they can still be accessed by visiting the Trip Library (use the Travel dropdown in the upper left corner of your screen).

Approval Queue on the home page…

If you are an approver, the Approval Queue area will display. Expense reports and

cash advances waiting for your approval are linked and summarized, with the most recent report/request listed first.

Using Your Profile

The **Profile** area, located along the upper left of the screen, allows you to see personal information and control certain aspects of Concur:

The EXPENSE INFORMATION page displays Procurement Card information, such as: default SpeedType, cardholder limits, Approving Official, and billing address. It also displays personal information, such as position data and your PeopleSoft Finance System vendor ID number.

The EXPENSE PREFERENCES page allows you to designate whether you wish to receive specific system-generated emails, see Concur prompts, or display certain items.

In general, wait until you have worked in Concur as delivered for a couple of weeks before changing the default settings. Two exceptions:

- If you do not have a Procurement or Travel Card, deselect the prompt checkbox *To add company card transactions to report.*

- If a delegate prepares your expense reports, deselect the prompt checkbox *For an approver when an expense report is submitted.*

Additional Step-by-Step Guides discuss other areas of your Concur Profile:

➢ Updating Your Profile in Concur is recommended to save your personal travel information, some of which is required by the federal Transportation Security Administration (TSA) to fly.

➢ Enabling E-Receipts is recommended to receive an electronic version of your receipt, sent directly by the hotel and car rental agency when booked through Concur (when available).

➢ Identifying Travel Arrangers is recommended for someone to be able to book travel, through Concur, on your behalf.

➢ Identifying Delegates is recommended for someone to be able to process expense reports on your behalf. (You must still *submit* your expense reports to your approver.) If you are an approver, this guide is also recommended for another approver to be able to approve expense reports on your behalf.