

Step-by-Step Guide

Working in the Concur Travel & Expense System

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.

The screenshot shows the Concur Home Page for user Heather Hoyer. The page is divided into several sections:

- Weather:** Local Weather section with a search box for an airport.
- Active Work:** Section with buttons for "New Expense Report" and "View Reports". It includes a table of Expense Reports (1) and Cash Advances (0).

Report Name	Status	Payment Status	Report Date	Requested Amount
Hoyer May-June 2014 Training	Submitted & Pending Approval - Roden, Normandy L	Not Paid	07/18/2014	\$28.00
- Travel Info:** Welcome message for Concur Travel, the online travel tool for University of Colorado. It includes contact information for Christopherson Business Travel and Christopherson's Online Travel Support Center.
- Company Info:** Expense System News section with a highlighted message: "Are you using Triplt Pro for your personal travel?".
- Trip Search:** Search form for flights, cars, and hotels. It includes fields for departure and arrival cities, dates, and times, along with search filters like "Price" and "Schedule".
- Finance and Procurement Help Desk:** Contact information for FinProHelp@cu.edu and a chat button.
- Useful Links:** Links to "Concur Travel & Expense System Learning Resources", "Delegate Authorization Form", and "Travel Arranger Form".

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.

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

Company Info

Expense System News

Are you using Triplt Pro for your personal travel?

If so, don't forget to mark those trips as "leisure" within the Triplt website so they don't appear in Concur. Refer to the Quick Reference Guide [Using Triplt Pro & the Triplt 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](#)

Trip Search

Plan your flight, car and hotel:

e.g. flight from JFK to Paris on Tuesday

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:

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.

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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.).

Report Name	Status	Payment Status	Report Date	Requested Amount
Hoyer May-June 2014 Training	Submitted & Pending Approval - Roden, Normandy L	Not Paid	07/18/2014	\$28.00

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.

Charge	Expense Type	Transaction Date	Amount
ALL COPY PRODUCTS, 303-2950741, CO	Copy Expenses	01/03/2011	\$70.95

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.

Report Name	Employee	Report Date	Total
Hoyer December 2010 Training	Hoyer, Heather	01/06/2011	\$37.40

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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.

My Profile

Your Information

Personal Information

Company Information

Contact Information

Expense Settings

Expense Information

Expense Delegates

Expense Preferences

Expense Approvers

Company Car

Favorite Attendees

Other Settings

System Settings

Expense Information

Save Cancel

Employee First Name Heather	Employee Last Name Hoyer	Email Address heather.hoyer@cusys.edu
Employee / Non-Employee Employee	Campus (5) System	Job Code Number-Description 2179 - Business Professional
Rostered Department: Code 50027	Rostered Department Description University Controller	Officer No
Vendor ID 0000180526	Expense Group Standard Car Mileage	Procurement Card Limits (per trans; per cycle) 0 / \$0 / \$0
Procurement Card Approver: Employee ID	Procurement Card Approver - Name	Procurement Card Default SpeedType
Procurement Card: Billing Address (Line 1)	Procurement Card Billing Address (Line 2)	Procurement Card City, State, Zip Code

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

My Profile

Your Information

Personal Information

Company Information

Contact Information

Expense Settings

Expense Information

Expense Delegates

Expense Preferences

Expense Approvers

Company Car

Favorite Attendees

Other Settings

System Settings

Expense Preferences

Save Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

The status of an expense report changes

New company card transactions arrive

Faxed receipts are successfully received

An expense report is submitted for approval

The status of an authorization request changes

An authorization request is submitted for approval

Prompt...

For an approver when an expense report is submitted

For an approver when an authorization request is submitted

To add company card transactions to report

Display...

Make the Single Day Itineraries page my default in the Travel Allowance wizard

Revised 07.21.14

Finance & Procurement Help Desk: 303.837.2161
For additional learning resources, visit www.cu.edu/psc.

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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.