

June 24, 2011

## Understanding Concur Travel & Expense

We have a number of learning resources available to help you use the Concur Travel & Expense System. If you haven't looked at them recently, here's a quick summary of what you can find.

On the [learning resources website](#) you'll see that we cover both Concur Travel issues and Concur Expense System procedures. Topics range from managing your Concur Profile and enabling e-receipts...to submitting reimbursement requests and handling personal charges...to writing rules in Outlook to manage the emails you receive from Concur.

We encourage you to take a look – and call the FinPro Help Desk if you have any questions about the instructions.

Happy reading!

## Travel Training: Yes, It's Out There

We continue to present training on the new travel component of the Concur Travel & Expense System. You can find a session on your (or another) campus by viewing the [online registration page](#) on the PSC website.

## New Travel Card Reminder

In just about 2 weeks, you could have your new Travel Card. That's all the time it takes to process your application and send the card to your campus address.

As a corporate liability card, the Travel Card simplifies the trip expense reimbursement process. The University pays the bill directly to US Bank and the cardholder reconciles card transactions on the Travel Reconciliation expense report.

The Travel Card Application form is on the [PSC forms web page](#) (look under "Cardholder"). Applicants will need to complete the online SkillPort course, Travel and Travel Card Training, prior to card issuance.

**Questions?** Contact [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu) or call 303.837.2161.

## Cash Advance Card Application

Remember: there's a new form in town. If you need to request an advance for your trip, use the [Cash Advance Card Application form](#). [The PSC Procedural Statement](#) tells you about the process.

## CU M@rketplace: Roles and Access

The PSC is working with campus Org Fiscal Managers to help departments prepare for the implementation of CU Marketplace on August 1. Business process review for each unit helps to determine who should have access to the Marketplace...and which role they should have in the system:

- **Shoppers** can request goods and services.
- **Requesters** can also requisition items – but in addition, can finalize purchases up to \$5,000.
- **Approvers** can authorize purchases over \$5,000 to proceed after reviewing the requested items and the designated SpeedTypes.

All roles must be requested by the Org Fiscal Manager. Additionally, individuals with the Approver role must be identified as SpeedType Fiscal Staff on the appropriate SpeedType(s).

The PSC's Director of Procurement Systems, Amy Gannon, is working with the Org Fiscal Managers to accomplish this task before training begins in mid-July. If you have questions about CU Marketplace access and roles, or about Fiscal Staff, contact [Amy.Gannon@cu.edu](mailto:Amy.Gannon@cu.edu) or 303.764.3426.

## Register for CU M@rketplace Training

Registration is now available for hands-on classes on using CU Marketplace. Once you know which role you'll have in the new system (see article, above), consider your options:

- **Shoppers** are not required to attend training. We do recommend that you complete the online course for CU Marketplace Shoppers. The course will be available in SkillPort on July 1. If you wish, you can instead (or in addition) attend an in-person session.
- **Requesters** must attend in-person training. You may find the online course for Shoppers interesting, as you have many of the same capabilities as shoppers, but the online course is not required and it does not cover all of your responsibilities in the system.
- **Approvers** must attend training. You have a choice: online course or in-person training. The online course will be available in SkillPort on July 1.

If you need – or want – to attend the hands-on class, [sign up now!](#) We look forward to seeing you in the M@rketplace!