

October 29, 2012

Concur Travel & Expense Survey: Tell Us What You Think

Nearly a year and a half has passed since the PSC implemented Concur Travel and introduced Christopherson Business Travel as the University's exclusive full-service travel agency. During this time, our goal has been to continuously improve the University's overall travel program and to enhance the specific tools you use to arrange travel itineraries and create expense reports.

We are now at a point where we need your feedback to help us continue these efforts. Therefore, we've created an online survey about the Concur Travel & Expense System.

The survey is broken into several sections:

- Background info
- Travel reservations and Concur Travel
- Christopherson Business Travel
- Concur Expense
- Technology

At the start of each section, you will be asked a question to determine if the section is applicable to your experience.

If you would like to contribute your thoughts for system improvement, please invest the 5-10 minutes necessary to complete the survey.

The survey is accessible from our home page – www.cu.edu/psc -- and will be available until November 9, 2012.

Questions? Contact Michael Fox at 303.764.3457 or michael.fox@cu.edu.

We look forward to hearing from you!

Concur Expense System Updates

Effective 10/22/12, the following enhancements are available in Concur Expense. We think you'll like them!

- Recently Used Expense Types section – lists Expense Types used recently or repetitively
- Change multiple fields for expenses simultaneously – select expenses and edit the data for shared fields so the same value appears for each expense
- Mileage Calculator additions – includes avoiding tolls, multiple routes, and drag-and-drop route
- Approvers can filter previously approved expense reports – for example, by employee

For more info, contact FinProHelp@cu.edu or 303.837.2161.

Focus on Instructions: Concur Transactions on Your Financial Statements

In our [Sep 7 newsletter issue](#), we noted the quick reference guide on reviewing Marketplace transactions on your financial statements. Today, we turn to a similar set of [instructions for the Concur Travel & Expense System](#).

The m-Fin Financial Detail Report was recently modified to present 2 travel-related subtotals. The first one – captioned SOURCE CODE ESE – lists transactions under that Account ChartField that derive from expense reports in Concur. The second subtotal is for SOURCE CODE NON-ESE ... and is compiled of relevant transactions from the Ghost Card, Non-employee Reimbursement reports, and PVs using the travel account CFs. (During Fiscal Year-End processing, you'll also see accrual journals and their reversals here.)

The easy-view Quick Reference Guide illustrates how these transactions appear on the m-Fin Financial Detail Report. Check it out. For questions, contact the FinPro Help Desk at 303.837.2161.

There's more help available online! Look on the PSC website (www.cu.edu/psc) under Training & Help, Online Learning Resources, Concur Travel and Concur Expense System. Happy reading!

Remember our Online Courses!

Don't forget our new or revised online courses in SkillSoft:

- CU Marketplace Approver
- CU Marketplace Requestor
- CU Marketplace Shopper
- CU Marketplace Receiver
- CU Marketplace Invoice Exception Approver
- Concur Travel
- Concur Travel Reconciliation
- Concur Procurement Card Reconciliation

The Marketplace courses are required for new role requests (exception: Shopper). The Concur courses are recommended, but not required.