

Step-by-Step Guide

Working in the Concur Travel & Expense System

The Home Page

The home page is your first view of Concur 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 a user named Heather. The top navigation bar includes 'Home', 'Travel', 'Expense', 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', and 'Profile'. The main content area features a 'TRIP SEARCH' section with flight search options (Round Trip, One Way, Multi-Segment), departure and arrival city fields, and a 'Search' button. Below this is a 'COMPANY NOTES' section with a tip titled 'Concur Enhances its Interface'. To the right of the tip is contact information for the Finance & Procurement Help Desk. The 'MY TASKS' section displays three cards: '00 Open Requests' (no active requests), '01 Available Expenses' (listing 06/12 Henry for \$8.00), and '01 Open Reports' (listing 11/21 Hoyer ATD ICE 2014 for \$286.48). A 'MY TRIPS (0)' section at the bottom indicates no upcoming trips.

There are several ways to navigate within Concur. One way is to use the Task Bar buttons located in the upper right corner of your Concur home page. You can use them to create new expense reports, view available expenses, upload images, access open reports, and request cash advances. If you are an approver, a button to access your approval queue also appears in the Task Bar.

Some areas of information included on the home page: Company Notes, Trip Search, My Tasks, and My Trips.

Company Notes

The Company Notes area contains Concur-related tips, resources, and help.

This close-up shows the 'COMPANY NOTES' section. It features a tip titled 'Expense System Tips' with the sub-heading 'Concur Enhances its Interface'. The text states: 'Beginning January 9, the Concur Travel & Expense System will present a new interface. [Learn about new features and functionality >](#)'. Contact information for the Finance & Procurement Help Desk is provided: 'FinProHelp@cu.edu' and '303.837.2161'. A 'Read more' button is located at the bottom right of the tip.

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Trip Search

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

My Tasks

The My Tasks area lists items that are in process, such as Procurement Card and Travel Card expenses pending reconciliation and expense reports pending your submission. If you are an approver, expense reports pending your approval appears as an additional list.

Expense reports that have been submitted no longer appear in your My Tasks area – they can still be accessed by clicking the arrow icon in the upper right of the list box.

My Trips

The My Trips area contains your upcoming trips booked through Concur or Christopherson Business Travel. Completed trips no longer appear in your My Trips area – they can still be accessed by clicking the arrow icon in the upper right of the area.

Using Your Concur Profile

Your Concur Profile allows you to see personal information and control certain aspects of Concur. To access the Concur Profile, select the **Profile** menu in the upper right corner of your screen and click **Profile Settings**.

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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 screenshot shows the Concur Expense Information page. The left sidebar contains a navigation menu with the following items: Your Information, Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards, Travel Settings, Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers, Expense Settings, Expense Information (circled in red), Expense Delegates, Expense Approvers, and Expense Approvers. The main content area is titled 'Expense Information' and contains several sections of input fields, including Employee / Non-Employee, Rostered Department, Vendor ID, Procurement Card Approver, and Procurement Card details.

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, uncheck the *To add company card transactions to report box*.
- If a delegate prepares your expense reports, uncheck the *For an approver when an expense report is submitted box*.

The screenshot shows the Concur Expense Preferences page. The left sidebar contains a navigation menu with the following items: Your Information, Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards, Travel Settings, Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers, Expense Settings, Expense Information, Expense Preferences (circled in red), Expense Delegates, Expense Approvers, Company Card, and Favorite Attendees. The main content area is titled 'Expense Preferences' and contains several sections of checkboxes, including Send email when..., Prompt..., and Display....

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.