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Concur [1]



The Concur Travel and Expense system is a solution accessed through the CU portal managed by the Procurement Service Center for the following:

- **Concur Request**:
  - Request approval for domestic and international travel
  - Apply for and request changes to Commercial Cards
- **Concur Travel**: Book travel for domestic and international trips (airline tickets, commuter trains, lodging, and rental cars)
- **Concur Expense:** Reconcile expenses for Commercial Cards, and request employee and non-employee reimbursements
- **Concur Cash Advance**

Airfare, procurement card, and travel card transactions are uploaded daily from our Commercial Card partner – US Bank – for expense reconciliation. To access the Concur system, log in to your campus portal [2] and on the **CU Resources Home** tab, click the **Concur Travel & Expense System** tile.

To find step-by-step guides about how to use Concur**, visit our searchable knowledgebase** [3]**.**

Glossary

Term	Definition
Allocations	In Concur, an allocation is defined as charging an expense line item to one or more SpeedTypes
Approval Flow	In Concur, another name for workflow.
Approving Official (AO)	Approving Officials (AO) within the university's procurement card program plays a critical role to ensure sound fiscal management of university resources by reviewing expenses. AOs must adhere to a comprehensive set of responsibilities as set forth in the *Procurement Card Handbook* [4]. AOs are the default approvers on an employee's Procurement Card reports.
Audit Trail	In the Concur Travel & Expense System, the Audit Trail is a record of all changes made to an expense report.
Campus Approver	Designated approver on each campus that typically reviews expense report exceptions such as official functions with alcohol or receipt violations.

Term	Definition
Cash Advance	An amount of money approved by the organizational unit and the PSC (and by the International Tax team, if appropriate), and issued to an employee to cover designated out-of-pocket expenses related to an official university business trip. Such expenses are typically related to group travel, extended stay, and/or remote location.
Company Card Charges	Charges placed on either a Travel or Procurement Card.
Concur Intelligence	Supervisors can pull Concur Intelligence data for all employees who report to them (directly or indirectly).
Concur Request	Request is a feature within Concur that allows a user to place a request for multiple items – CU currently uses this feature to request approval for university travel and for Commercial Cards.
Employee Non-Travel Expense Report	Used for employee reimbursements for non-travel expenses.
Expense Report	Used in Concur to request reimbursement or reconcile Commercial Card charges.
Expense Report Policy	In Concur, this is a way of guiding the end user for creating expense reports. All employee reimbursements and travel expenses from the travel card and airfare card go on the Travel Reconciliation policy, procurement card charges are attached to the Procurement Card policy, non-employee reimbursements, travel card and airfare charges on the Non-Employee Expense policy and travel requests are made on the Request policy.
Expense Type	Expense types are specific to Concur – Concur provides a curated list of expense types that a narrowed down from the larger and more encompassing account code tree.
High Risk Approver	High risk international destinations route to a designated approver on each campus (one per campus) that reviews whether travel to this location is merited.

Term	Definition
HR Approver	HR approval is a workflow step employees may select when submitting Concur requests or reports – their supervisor will receive the approval request for these items.
International Approver	An automated workflow step in Concur that routes to a designated approver on a campus if an individual selects that they are requesting approval for or are reconciling expenses from an international trip.
MCC	Merchant Category Code
Mileage Calculator	The **Mileage Calculator** is a feature within Concur used to enter your reimbursable miles by way of an online map.
Non-Employee Expense Report	Used to reconcile all expenses for non-employees, including reimbursements, airfare charges and travel card charges.
Officer Approver	Concur workflows to the officer of an organization for certain official function/recognition expenses.
Procurement card	CU credit card used to purchase goods and services, used only for except in very rare circumstances small dollar (<$5,000) purchases.
Procurement Card Report	Used to reconcile charges that are made on the procurement card.
Report Header	The expense report header defines the type of expense report being created and other key information defining parameters around the expense report.
Report Key	Key field for Concur reports (currently 7 digits), only visible to PSC employees. Departments generally refer to reports by the report name.
Report Name	Name given to Concur reports by the department, by whoever created the report.
Speedtype Approver	Individuals dictated in the Finance system to make approvals on SpeedTypes in various System workflows - various Concur functions will workflow to these approvers as applicable.<

Term	Definition
Travel Reconciliation Report	Used for employee reimbursements for travel expenses and reconciliation of employee expenses from the travel card and airfare card.
Unassigned Expense	An expense in Concur, not currently assigned to a report.
Unsubmitted Expense	An expense in Concur that is assigned to an unsubmitted report.
Vendors	The seller of goods and/or services. "Vendor" is a term used widely in Concur - it's required to identify the vendor on a Rental Car expense, for example (Travel).
USB Airfare Card	Concur product name referring to airfare charges (sometimes referred to as the BTA/ghost card or lodge card. The USB Airfare Card is a single credit card # used for all airfare charges, whether booked directly in Concur or with Christopherson Business Travel (CBT).

To download the full glossary, click here [5].

Resources

- Access Concur via your campus portal [2]
- Access and Training Requirements [6]
- PSC - Travel [7]
- University Risk Management - Travel [8]
- Calculating Reimbursable Mileage and Ground Transportation [9]

Related Articles

- Concur: Completing Your Profile [10]
- Concur Expense: Adding and Managing Itineraries and Per Diem/Meals (Travel Allowance) for Employees [11]
- Concur Expense: Creating a New Employee Expense Report [12]
- Concur Expense: Employee Non-Travel Expenses Report [13]
- Concur Request: Creating and Submitting Travel Pre-Approvals [14]
- Concur Travel: Booking Airfare in Concur [15]

SEARCH ALL ARTICLES [3]

Policies and Procedures

- PSC Procedural Statement: Travel [16]
- APS 4024 - Travel Authorization Policy [17]
- PSC Procedural Statement: Cash Advances [18]
- Finance Procedural Statement: Business Expense Substantiation & Tax Implications [19]

VIEW ALL PROCEDURES [20]

Groups audience:
Procurement Service Center

Source URL:https://www.cu.edu/psc/get-help/learning-resources/concur

Links
[1] https://www.cu.edu/psc/get-help/learning-resources/concur [2] http://my.cu.edu/
[3] https://pschelp.cu.edu/s/ [4] https://www.cu.edu/psc/procurement-card-handbook
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[11] https://pschelp.cu.edu/s/article/Concur-Expense-Adding-and-Managing-Travel-Allowances-Per-Diems-Employees [12] https://pschelp.cu.edu/s/article/Concur-Expense-Creating-a-New-Employee-Expense-Report [13] https://pschelp.cu.edu/s/article/Concur-Expense-Creating-a-New-Employee-Non-Travel-Expenses-Report [14] https://pschelp.cu.edu/s/article/Concur-Request-Creating-and-Submitting-Travel-Pre-Approval-Requests [15] https://pschelp.cu.edu/s/article/Concur-Travel-Booking-Airfare-in-Concur [16] https://www.cu.edu/psc-procedural-statement-travel [17] https://www.cu.edu/ope/aps/4024
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