Reconciling Employee Travel in Concur [1]

General information on how to travel is available on the Travel page [2].

For detailed guides on how to use the Concur Travel and Expense System, visit the New Concur User Interface [3] page.

Logging into the Concur Travel & Expense System

Log in to your campus portal [4] and on the CU Resources Home tab, click the Concur Travel & Expense System tile.

Step 1 - Creating the Expense Report

Creating the Expense Report [5]

Step 2 - Adding Expenses (including Reconciling Cash Advances)

How you paid for an expense determines whether the expense should be imported or added as a new expense.

Adding an expense (to include airfare and travel card charges) [6]

Adding Out-of-Pocket Expenses [7]

Use these guides to add common travel expenses to your report.

Adding Mileage to Expense Reports [8]

Adding Lodging to Expense Reports [9]

Adding Meal Per Diem to Expense Reports [10]

Using the Travel Card to Pay for Travel Meals [11]

Adding Attendees to Official Function Expenses [12]

Reconciling Cash Advances [13]

Refunds vs. Reimbursements [14]

Step 3 - Allocating Expenses
• Allocating Expenses [15]

Step 4 - Attaching Documents

Attaching Documents Using the Available Receipts Area [16]

Delegates: Emailing Receipts to the Available Receipt Area [17]

Using Travel Apps [18]

Step 5 - Setting the Approval Flow

Setting the Approval Flow [19]

Step 6 - Reviewing and Submitting Expense Reports

Determining Reimbursement Amounts [20]

Submitting Expense Reports [21]

Looking Up Employee Reimbursements in Concur [22]

Looking Up Employee Reimbursements in the Finance System [23]

Source URL: https://www.cu.edu/psc/reconciling-travel-concur

Links
[1] https://www.cu.edu/psc/reconciling-travel-concur
[5] https://www.cu.edu/node/40921
[7] https://www.cu.edu/node/40925
[8] https://www.cu.edu/psc/concur-how-adding-mileage-expense-reports
[9] https://www.cu.edu/psc/concur-how-adding-lodging-expense-reports
[10] https://www.cu.edu/psc/concur-how-adding-meal-diem-expense-reports
[12] https://www.cu.edu/adding-attendees-official-function-expenses
[14] https://www.cu.edu/psc/refunds-vs-reimbursements
[15] https://www.cu.edu/psc/concur-how-allocating-expenses
[16] https://www.cu.edu/psc/training/attaching-documents-using-the-available-receipts-area
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[18] https://www.cu.edu/psc/training/using-travel-apps
[19] https://www.cu.edu/psc/concur-expense-user-added-approvers
[21] https://www.cu.edu/psc/training/reconciling-concur/submitting-expense-reports
[22] https://www.cu.edu/psc/concur-how-looking-employee-reimbursements
[23] https://www.cu.edu/controller/fin-how-looking-employee-reimbursements