A Very Brief Intro to Concur

Updates to Policies and Procedures & Introduction to Concur Travel and Expense System

Presenter:

Cindy Stewart
Changes

• Concur was selected with the intention that travelers would request their own trip pre-approvals, book their own trips, and process and submit their own reimbursement requests.

• However, if you cannot process your own reimbursement requests (known as “expense reports” in Concur), you can ask an admin staff to do it for you. Jess and Cindy have been added as Expense Delegates to your profile.
Changes

Travel Pre-Approval – Travelers must request pre-approval for every trip that involves any of the following: air travel, train travel, hotel stays, or car rental, and all international travel.

- Pre-approval can be requested when not required, to obtain duty of care coverage.
- If you do not request pre-approval when required, you will not be covered by duty of care or travel insurance, and you cannot submit an expense report to receive reimbursement.
Changes and reminders

- Travelers are not required to book with Key Travel (through Concur), but they are strongly encouraged to do so. If you do not see a flight or rate in Concur that you see available elsewhere, call Key Travel at 267-603-5501.
- As previously, if you do not use UConn’s travel agency, you must get a “comp” that shows that the comparable flight(s) from Key Travel cost more. Comps now must show that they are done on the same date you book your flight.
Changes

Faculty can get a Travel Card to which they can charge appropriate travel expenses so that those expenses are not sitting on a personal credit card until reimbursed. Another advantage to getting a Travel Card is that the charges will appear within the Concur system without having to snap or scan receipts and send them to Concur. For more info, go to https://travel.uconn.edu/travel-card/
Changes and reminders

Some travel policies have changed, and you are responsible for knowing the policies. 
http://travel.uconn.edu

What’s brewing in OVPR/AAUP funding... 
TBA
Intro to Concur Travel & Expense System

Important Terms

**segment**

n. a type of travel expense, such as airfare, hotel, car rental, or train

**duty of care**

n. the university’s commitment to its employees to provide support during travel

Duty of Care enables UConn to know where employees and students will be traveling to, and in the case of an emergency, to communicate with travelers to ensure their safety and/or provide safety instructions. The location of the traveler can be determined in a variety of ways:

- Based on the dates/times/locations entered on the pre-approval request.
- Based on the uploaded itinerary from a traveler who booked outside the system
- Based on the employee initiating a “ping” in Concur to alert the system to their current location
Overview of new travel process

In Concur, enter trip info and expense estimates to request pre-approval.

With Travel Card
Travel, paying appropriate expenses with T-card. Charges appear in Concur for use in expense report.

Without Travel Card
Travel, paying appropriate expenses with your personal credit card. Snap/email receipts or use app to take photo of receipt to upload to Concur system.

Prepare Expense Report, pulling in expenses that appear based on use of T-card or snapped/emailed receipts. Submit Expense Report.

Report is routed through approvals; reimbursement is posted.

Book flight, hotel, etc. with Key Travel, from within Concur or by calling Key.
Logging in and home page

Go to https://travel.uconn.edu, click on Concur Travel and Expense, and log in with your NetID and password. You’ll see something like this:

- Ribbon with functional areas
- Online booking with Key Travel
- Upcoming trips entered in Concur
Editing your profile

Your profile must be updated when logging into Concur for the first time.

Accessing Profile Settings

1. From the Concur homepage, click **Profile** and then click **Profile Settings**. *The Profile Options view displays.*
Editing your profile (cont’d)

PERSONAL INFORMATION

The Personal Information section contains information such as Traveler Name, Company Information, Contact Information, and more. Review each field for accuracy and update, as appropriate.

1. On the Profile Options page, click Personal Information.

2. First Name, Last Name, Employee ID, and Company Name will automatically populate.

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NOTE: Grayed out fields are not editable. If there are errors in these fields, email travel@uconn.edu for assistance.
Editing your profile (cont’d)

Contact Information

1. Complete all Work Address fields.
2. Complete all Home Address fields.
3. Either a Work Phone OR Home Phone is required. Both can be entered, as desired.

NOTE: Fields marked [Required] must be completed before you can save your profile. You do not need to save after each section.

4. Click the Add a new device link to register your mobile device.

NOTE: Use of Mobile apps is optional for travelers, but if desired, registering a mobile device is required for mobile app integration/functionality.
Email Addresses

Your UConn email address will feed to your profile by default.

1. Confirm your UConn email for accuracy.
2. Click the **Verify** link. This will associate information forwarded from that email address to your Concur account.
3. Click **OK** to return to the profile.

*A Verification Code is sent to your email address.*
4. Additional email accounts you may use to send itineraries, outlook invitations, and/or receipts from, click **Add additional Email** and then **Verify**, as necessary.

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**NOTE:** Select Yes for the **Contact for Travel Notifications** options, as desired.
5. Complete all Emergency Contact fields.

6. Review the Travel Preferences section. Update as desired.

7. Complete TSA Secure Flight fields, as desired.

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NOTE: If applicable, TSA Secure Flight REQUIRES Gender and Date of Birth.

International Travelers should complete Passport and Visa fields.

Credit Cards

1. Click the Add a Credit Card link. A prompt displays.

2. Enter your UConn Travel Card information, as applicable.

3. Enter a personal credit card, if a Travel Card is not available.
Tips

When you log into Concur, you’ll be practically bombarded with notices to use Tripit Pro, an app for your smartphone that allows you to book travel, view trip information, take photos of receipts to make them available for your expense report, and all sorts of fun stuff. I strongly recommend it. Instructions are in those notices that will be bombarding you.

Tripit® from Concur
Tips

As soon as you start planning to travel, either take a training session offered now via WebEx, or watch one of the recorded training sessions, or at least look at the instructions that are broken down by topic. All can be accessed at

https://travel.uconn.edu/training-and-resources/
Questions?