



## Concur Travel Training

*Presenters: Jen Cornell and Steve Jackson*



# Agenda

- Concur Roles
- Mobile Apps
- Benefits with Booking Travel in Concur
- Types of Bookings in Concur
- Travel Information Available in Concur
- Support



# Roles

## Traveler

A person who travels on behalf of university business.

## Travel Arranger

An individual who books travel on behalf of a traveler.  
*(aka: Assistant)*

## Expense Delegate

An individual who can create an expense report on behalf of a traveler.

## Supervisor/HR Supervisor/BI Manager

The traveler's HR Supervisor who is listed in Workday.

## KFS Org Manager/Cost Object Approver (COA)

An individual responsible for the accuracy for the account charged and that the expenditure is appropriate for the account function on a Request and Expense report.

## Expense Processor

A person who is responsible for reviewing and approving expense reports for policy compliance.

## Cash Advance Admin

A person in DFA who will issue cash advances.

## Administrators

A central role within DFA who will oversee the system.

## Report Users

An individual who utilizes the Concur Business Intelligence Module for reporting purposes.



## Mobile Apps from Concur Which App to Use When



- Manage your itinerary: Book, change or cancel flights, hotel, car and rail reservations.
- Create and submit expense reports.
- Capture images of your receipts.
- Upload photos of your receipts using **ExpenseIt** which is included within the Concur mobile app. ExpenseIt will read your receipt with optical character recognition (OCR), and automatically creates and categorizes expenses. It even can itemize hotel bills.
- **\*Submit supporting documentation that is not a receipt, such as premium airfare approvals, email approvals, or other images. Email these items to [receipts@concur.com](mailto:receipts@concur.com). They will appear in Concur under Available Receipts and can be attached to your trip.**
- **See all the receipts you've submitted in your Available Expenses in Concur, where you can itemize them and attach them to your Expense Report.**
- Submit electronic (email) receipts to Concur by emailing them to [receipts@expenseit.com](mailto:receipts@expenseit.com).



- View your itinerary – even plans that you don't make in Concur, such as restaurant reservations.
- **\*Submit itineraries (email confirmations for flights, hotels, etc.) booked outside of Concur to [plans@tripit.com](mailto:plans@tripit.com) and the information will appear in TripIt.**
- Keep track of your reward-program points (and miles) in one spot.
- Receive check-in reminders.
- Receive real-time alerts for delays, cancellations, and gate changes.
- See when the airline seat you want becomes available.
- Find alternate flights with open seats.
- Receive alerts when you're eligible for a flight refund (even for your personal trips).

**\*NOTE:** Make sure you send your email from one of the email addresses you register in Concur. If your Travel Arranger or Expense Delegate (registered in Concur on your profile) is submitting itineraries/documentation for you, they **must add** your NetID email address ([NetID@cornell.edu](mailto:NetID@cornell.edu)) in the subject line of emails they send.



# Benefits with Booking Travel in Concur

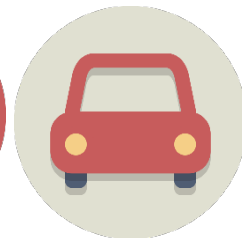
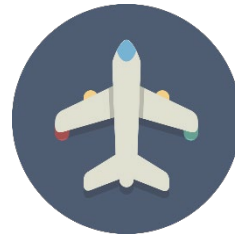
- Corporate Travel Planners (CTP), travel agency in Concur
  - Online bookings
  - Full-service assistance bookings
  - Group travel bookings
- Itinerary information automatically feeds into Concur which is then used to populate your Travel Allowance (e.g. Per Diem)
- Cornell's preferred pricing and negotiated discount rates are pre-loaded into the system (e.g. rental car rates)
- CTP also has negotiated discount rates with certain suppliers. If their rate is better than Cornell's, you will automatically receive the better rate.





# Types of Bookings in Concur

- Air, Rail, Car and Hotel
- Conference Hotel Rates



## Exceptions:

- Basic Economy – *these will need to be booked outside of Concur*
- Airbnb
- Campus to Campus Bus
  - Continue to book C2C via their site and department charge to receive the discounted rate.
- Fleet Garage
  - Continue to book through Fleet Garage using their Agile system and department charge to receive the discounted rate.



# Travel Information Available in Concur

- **Tools**
  - Travel Maps, Weather, Currency Converter
- **International Travel**
  - U.S. Passport Services, Travel Warnings, Foreign Entry Info, CDC Traveler's Health
- **General Information**
  - Destination Information, World Airport Guide, World Clock – Time Zones





# SUPPORT



Blog

<http://blogs.cornell.edu/travel/>



Yammer

*search for Concur*



Questions

[concur-support@cornell.edu](mailto:concur-support@cornell.edu)





# Booking Travel in Concur

[concur.cornell.edu](https://concur.cornell.edu)

