

# Columbia University Finance Training

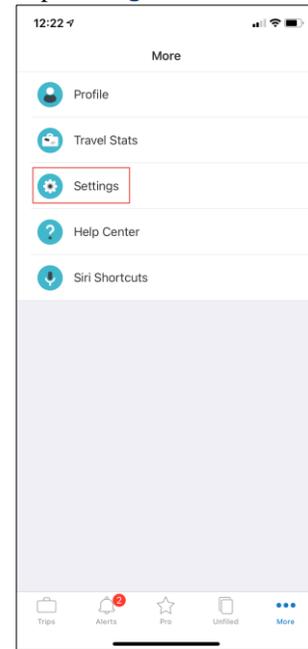
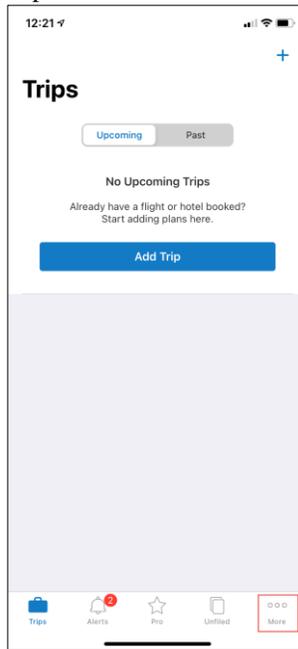
## Job Aid: Setting Up TripIt Pro to Share Trips with Concur and Colleagues

This job aid covers the steps for setting up the TripIt Pro app so that you can share your trip plans with Concur and colleagues. If you use TripIt Pro for personal travel, you do not need to share your trips with Concur or, if a personal trip appears in Concur, you can remove it. You can use the Inner Circle feature to share your trips with colleagues.

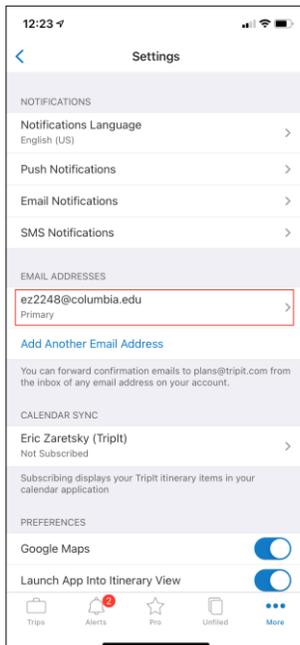
### Setting the Default for Share Trip Plans with Concur

You can set TripIt so that your Trip Plans are shared with Concur by default. If you do not want to share personal trips with Concur, make sure that this setting is toggled off.

1. Open the **TripIt** app on your phone.
2. Tap the **More** tab.
3. Tap **Settings**.



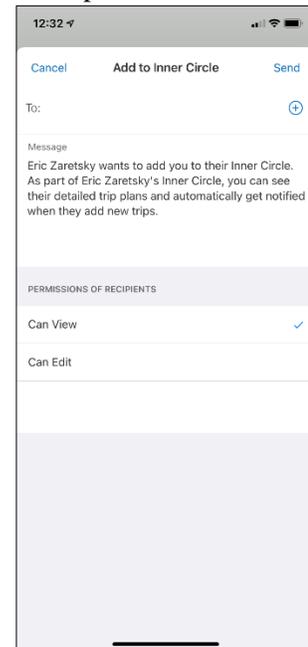
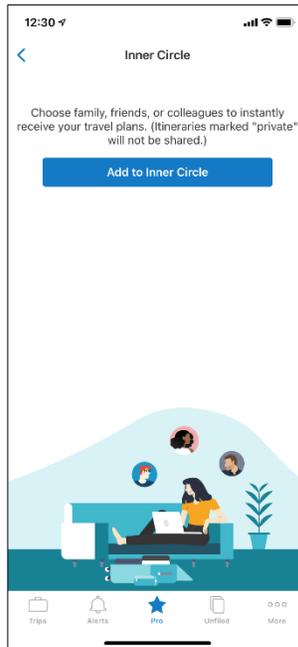
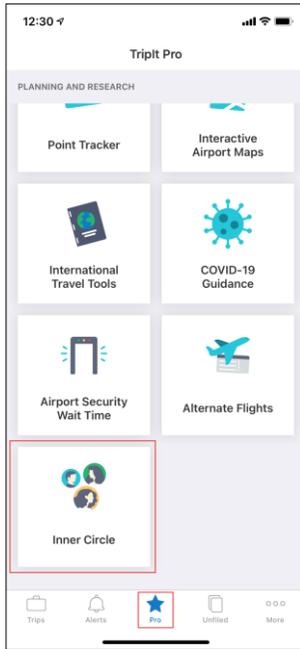
4. Select your Columbia email address.
5. Toggle **Share Plans with SAP Concur** as needed.



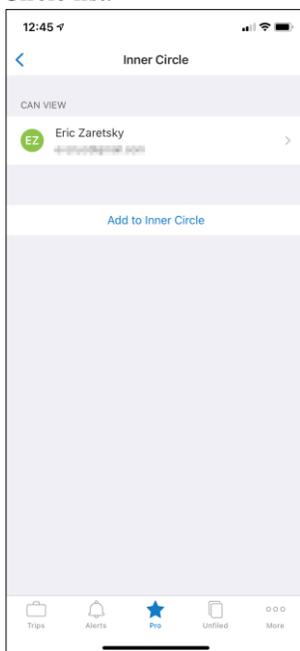
### Invite Colleagues or Others to Your Inner Circle to Share Your Trips

By adding people to your Inner Circle in TripIt, members receive your trip information immediately upon itinerary creation and will receive alerts regarding your trips. Members of your Inner Circle do not need to be TripIt users.

1. Tap the **Pro** icon and select the **Inner Circle** tile.
2. Tap **Add to Inner Circle**.
3. Add email address(es) in the **To** field of your invitees and select if they can **View** or **Edit** your trips and tap **Send**.



After your invitees accept your invitation, they appear on your Inner Circle list.

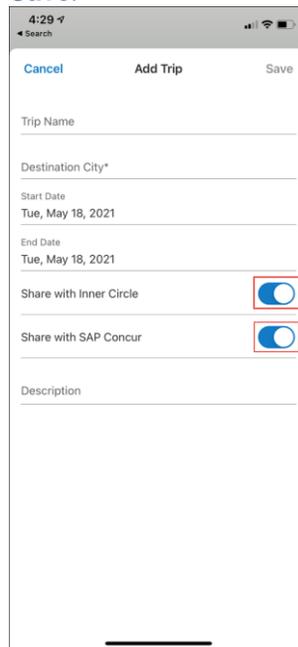
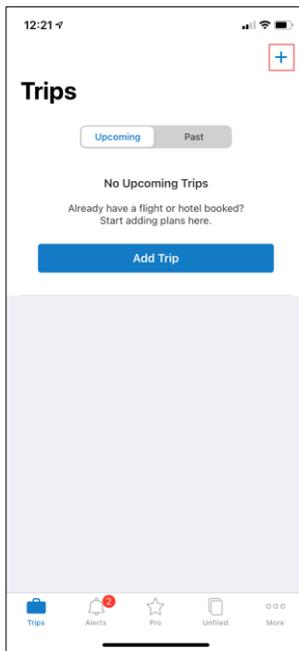


### Manually Sharing a Trip

If you don't wish to share trips with Concur or your Inner Circle in order to **avoid sharing personal trips**, you can still select specific business trips to be shared. After a trip is created, you can only edit the Share with SAP Concur setting.

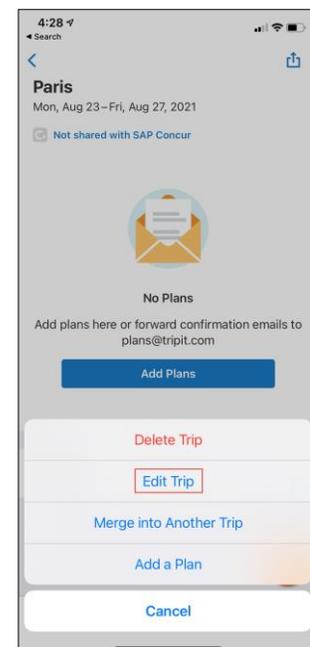
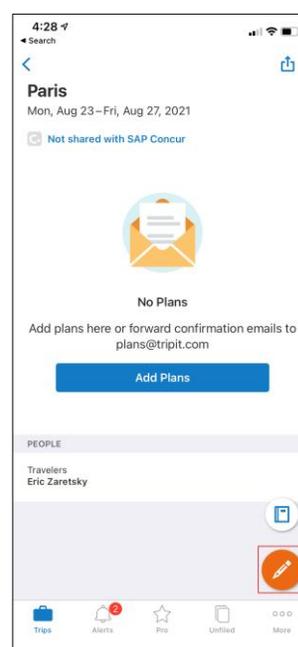
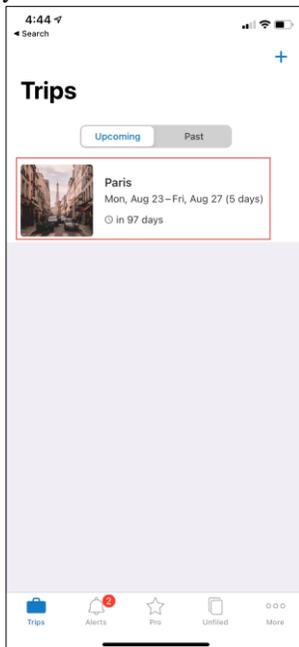
### Sharing a New Trip with Concur or Your Inner Circle

1. From the **Trips** folder, tap the **+** icon.
2. Complete the trip details and toggle **Share with Inner Circle** or **Share with SAP Concur** as needed. Tap **Save**.

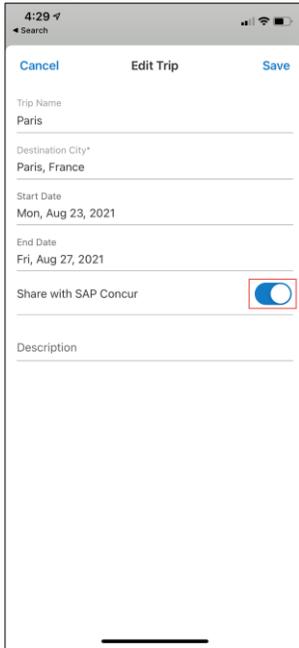


### Sharing an Existing Trip with Concur

1. From the **Trips** folder, select the trip you want to share.
2. Tap the **Edit** icon.
3. Tap **Edit Trip**.



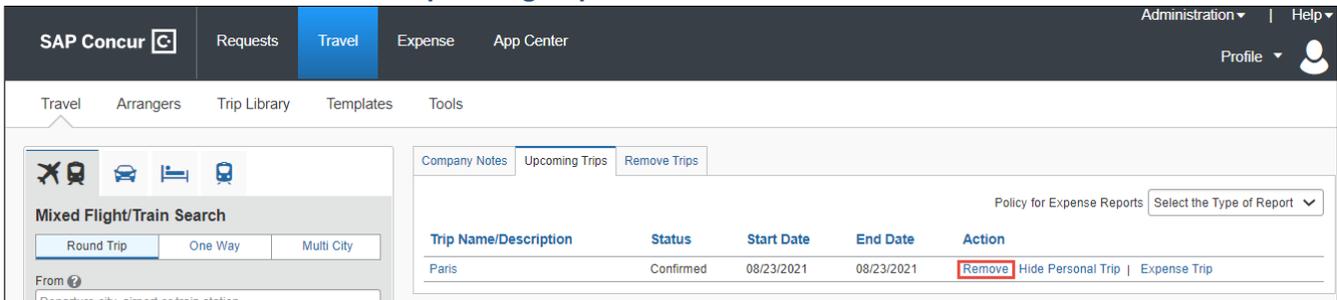
4. Toggle **Share with SAP Concur** and tap **Save**.



### Removing a Personal Trip from Concur

If you have inadvertently added a personal trip to Concur, you can remove it.

1. Login to **Concur**.
2. Select the **Travel** tab and click the **Upcoming Trips** tab.



3. Find the trip you would like to remove, click **Remove** and **Yes**.

### Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>