### **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.



4. Select your Columbia email address.

12:23 🗸 Settings < NOTIFICATIONS Notifications Language inglish (US) Push Notifications Email Notifications SMS Notifications EMAIL ADDRESSES ez2248@columbia.edu Add Another Email Address You can forward confirmation emails to plans@tripit.com from the inbox of any email address on your account. CALENDAR SYNC Eric Zaretsky (TripIt) > Subscribing displays your TripIt itinerary items in your calendar application PREFERENCES Google Maps Launch App Into Itinerary View \_<mark>2</mark> Pro ...

5. Toggle Share Plans with SAP Concur as needed.



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# **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 2. Tap **Add to Inner Circle**. Inner Circle tile.



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





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**.



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### **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.

2. Complete the trip details and toggle

Share with Inner Circle or Share

Sharing a New Trip with Concur or Your Inner Circle

1. From the **Trips** folder, tap the **+** icon.

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Cancel	Add Trip	Save
Trip Name		
Destination Cit	y*	
Start Date Tue, May 18, 20	021	
End Date Tue, May 18, 20	021	
Share with Inne	er Circle	
Share with SAF	Concur	
Description		

Sharing an Existing Trip with Concur

1. From the **Trips** folder, select the trip 2. you want to share.



Tap the **Edit** 🥝 icon.



#### 3. Tap Edit Trip.



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4. Toggle Share with SAP Concur

4:29 1 Search		ıı ?∎
Cancel	Edit Trip	Save
Trip Name		
Paris		
Destination City*		
Paris, France		
Start Date		
Mon, Aug 23, 2	021	
End Date		
Fri, Aug 27, 202	1	
Share with SAP		
Description		

**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.

SAP Co	oncur	Ċ	Requests	Travel	Expen	se Ap	p Center				Administration •   Help • Profile ▼ ♀
Travel	Arra	ngers	Trip Library	Template	es To	ools					
XQ		i	R		Co	mpany Notes	Upcoming Trips	Remove Trips			
Mixed Fli	ight/Tr	ain Sea	irch								Policy for Expense Reports Select the Type of Report 🗸
Round	1 Trip	0	ne Way	Multi City	Т	rip Name/De	escription	Status	Start Date	End Date	Action
From 🕜	city airm	ort or train	station		P	aris		Confirmed	08/23/2021	08/23/2021	Remove Hide Personal Trip   Expense Trip

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