

Concur Travel Quick Guide



This Quick Guide details the payment methods you can use to book and purchase travel using Concur or World Travel (WTI), how to use Concur to book and purchase travel, and how to create an Expense Report for reconciliation or reimbursement. For more detailed instruction, please refer to the [Concur Travel and Expense Training](#). To learn how the Concur App and other mobile tools can assist with travel and expense management, visit the [Mobile Tools](#) section of the Travel and Expense Portal.

1.

Travel Payment Methods



When making business travel-related purchases through Concur Travel or over the phone via World Travel Inc (WTI) Travel Counselors, you can use different payment methods depending on the type of travel product you are booking and your role. In some cases, University policy will determine which payment method(s) can be used. The tables below will help you determine the best way to pay.

Faculty / Staff:	Air Fare	Rail	Hotel	Car Rental	Incidentals	Conference Registration
Columbia Air/Rail Central Pay All Travelers - <u>No out of pocket expense</u> , must reconcile in a Concur Expense Report	✓	✓				
Travel and Expense Corporate Card Those traveling 5-6 times per year or Travel Arrangers - <u>No out of pocket expenses</u> , must reconcile in a Concur Expense Report			✓	✓	✓	✓
Personal Credit Card Will result in out of pocket expenses	✓	✓	✓	✓	✓	✓
P-Card P-Card holders – No out of pocket expense, must reconcile charges in ARC						✓
Personal Frequent Traveler Programs For personal travel only; the University will not reimburse cash for the use of points						

A Travel Arranger has the ability to book travel for guests of the University. Only identified Travel Arrangers may book and pay for Group Travel through World Travel Inc.'s Global Meetings and Events (GME). See [Book Group Travel](#) for more information. If you are purchasing travel in your role as a Travel Arranger, please reference the table below:

Guests (Travel Arrangers):	Air Fare	Rail	Hotel	Car Rental	Incidentals	Conference Registration
Air/Rail Central Pay	✓	✓				
Travel and Expense Corporate Card The corporate card can be used to hold the reservation, but the traveler must present their own card upon check-in/pick-up. Specific to hotels only, if you do not want the traveler to pay with their own card, you can set up Direct Billing to a different card, including the Corporate Card, following the security guidelines outlined in the Travel How Tos section of the Travel & Expense Portal.			✓	✓		

Note: Travel Arrangers can book travel on behalf of students. If needed, students can be opted-into Concur by DAF's in order to book their own travel. Prior to booking, students that book their own travel must submit a Pre-Trip Request in Concur. Refer to the [Submitting a Pre-Trip Request](#) video.

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2.

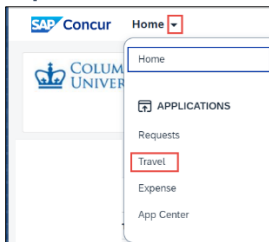
Purchasing Travel Using Concur



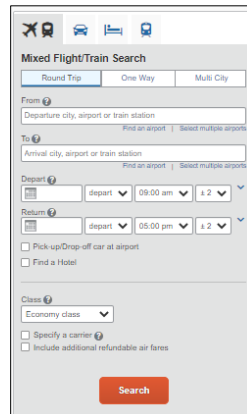
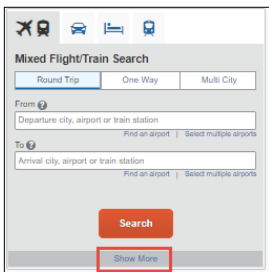
Concur Travel utilizes a user friendly, familiar interface similar to other consumer online booking tools for purchasing airfare, reserving hotels, and booking rental cars. Purchases are fulfilled by World Travel Incorporated (WTI). When you use Concur or WTI, your travel purchases are integrated with Concur Expense so you can easily create Expense Reports.

For complete instructions on how to book flights, hotels, and car rentals in Concur Travel, visit the videos for [Using Concur Travel to Purchase Domestic Air or Hotel and Rental Car](#) or [Using Concur Travel to Purchase International Air, Hotel, and Rental Car](#). If you have access to the Concur Travel module, you can assign a Travel Delegate in your Profile Settings to book travel on your behalf. Please reference the [Job Aid: Managing Delegates](#) for more information.

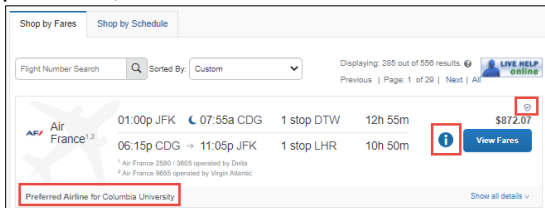
1. Navigate to <https://travel-expense.finance.columbia.edu/> to log into Concur. Click the Home dropdown and select Expense.



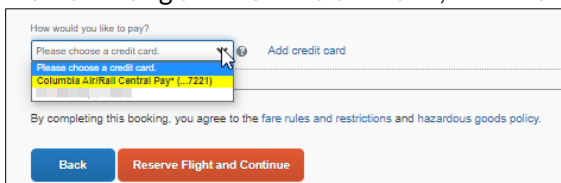
2. Click **Show More** in the Search section. The Search panel expands to display additional fields for departure times and additional options for adding rental car, hotels and other details in the search.



3. Enter your travel preferences and click **Search**. Search results will display matching results, indicate preferred travel providers, and show alerts that indicate if items conform to University policies.



4. After selecting the desired travel item, review the details and select **How would you like to pay?** before reserving.



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3.

Creating an Expense Report



After returning from your trip, create and submit an Expense Report in Concur to reconcile any expenses made using the Columbia Air/Rail Central Pay or the Travel and Expense Corporate Card or to get reimbursed for expenses you incurred using your personal credit card or cash. For more detailed instruction, please refer to the [Creating Expense Reports in Concur](#) job aid. For Expense Type examples, please refer to the [Concur Travel and Expense Training](#). For expensing and itemizing Hotel/Lodging expenses, refer to the [Itemizing Hotel/Lodging in a Travel Expense Report in Concur](#) job aid.

You can also assign a Delegate to prepare Expense Reports on your behalf. Please reference the [Job Aid: Managing Delegates](#) for more information.

1. Navigate to <https://travel-expense.finance.columbia.edu/> to log into Concur. Click the Home dropdown and select Expense. The Manage Expenses screen displays Active Expense Reports and the Available Expenses list displays any transactions from the Columbia Air / Rail Central Pay and the Travel and Expense Corporate Card.

The screenshot shows the 'Manage Expenses' page in SAP Concur. At the top, there are tabs for 'Manage Expenses' and 'Cash Advances'. Below the navigation, there's a breadcrumb trail: 'Home / Expense / Manage Expenses'. The main heading is 'Manage Expenses'. Underneath, there's a 'Report Library' section with a 'Create New Report' button highlighted in a red box. A 'View: Active Reports' dropdown is also visible. Two expense report cards are shown: 'Business Meetings' for \$185.00 and 'ATD Conference' for \$750.00, both marked as 'Not Submitted'.

2. Select the items from Available Expenses to move to a new or existing Expense Report.

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Cash/Personal Credit Card	Car Rental	ENTERPRISE RENT-A-CAR	06/30/2019	\$982.13
<input checked="" type="checkbox"/>	CU Corporate Card	Car Rental	ENTERPRISE RENT-A-CAR Seattle, Washington	06/30/2019	\$982.13

3. Click the Move to dropdown and select to add the transaction to an unsubmitted Expense Report or to a New Report.

The screenshot shows the 'Move to' dropdown menu from the table above. The menu is open, showing options like 'Business Lunch' and 'New Report'. A mouse cursor is pointing at 'New Report', which is highlighted in blue.

4. Complete your Expense Report. Attach any required receipts, proof of payment, or supporting documentation.
5. After you complete your Expense Report, click Submit Report and Accept & Continue.