STEP-BY-STEP GUIDE: CONCUR TRAVEL REQUEST

Step 1: Accessing Concur

1. To access Concur, navigate to mycuinfo.colorado.edu.

2. Enter your IdentiKey username and Password.

3. Click on the **Concur Travel & Expense System** tile.

Step 2: Obtain a Travel Itinerary and Quote

Use Concur or Christopherson Business Travel (CBT – the University's travel management company) to obtain your desired travel itinerary and quote, which you will need to complete your request. There is a $20 service fee when *arranging* travel with a CBT agent, but there is no charge for obtaining a quote. CBT's contact information:

- Toll Free Phone: 1.855.462.8885
- Local Phone: 303.694.8744
- Email: cutravel@cbtravel.com

Step 3: Create a Travel Request in Concur

1. In Concur, hover over the **New** button and select **Start a Request.**

2. Complete the required fields in the pop-up window, **Create New Request.**

    a. Request Name – please name your request using the following format: *Last Name – Destination, Dates of Travel.*
        i. Example – Klopp – Tuscon, 8/4-8/6/22
    b. If you anticipate traveling to more than one city and/or country, enter where you plan to spend the majority of your travel time as the **Main Destination City**. You'll identify the other cities/countries later.
    c. For international trips, if you are unsure of whether you are taking information or equipment subject to export control, select **Yes** so our campus Export Control office will be notified about your trips.
    d. When answering the question "Is this grant funded?" you will answer **no**, unless the Speedtype funding the trip begins with the numbers 130 or 131.
    e. Select *HR Supervisor* under **Submit Requests To**.
    f. Enter the primary Speedtype that will be used to fund your trip.
        i. If a secondary Speedtype will be used to fund your trip, please note it in the **Comment** field.
        ii. For trips that will be paid for by an external entity, enter your travel Speedtype and **indicate in the comments** that the trip will be paid for by another entity.
    g. Fully explain the reason for your trip in the **Comments** area.
    h. Use the **Attachments** dropdown to select **Attach Documents**. Attach your documentation file by clicking **Browse** and **Attach**.
        i. If your travel is occurring during the regular academic year, please attach a Word document or a PDF that explains how you plan to cover your classes and other professional obligations in your absence.
    i. Click **Create Request**.
    j. If your travel is occurring during the regular academic year, please attach a Word document or a PDF that explains how you plan to cover your classes and other professional obligations in your absence.

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         i. Use the Attachments dropdown to select Attach Documents. Attach your documentation file by clicking **Upload and Attach**.

3. Under the Expected Expenses header, select **Add.** Air Ticket information is required **regardless of whether you will request airfare** and impacts the approval flow of your request. Type or select **Airfare.**
    a. Select whether your trip is **Round Trip, One Way,** or **Multi City**. If there is a layover or plane change at any part of your flight, select **Multi City**.
    b. List the air segments of your trip so they match your preliminary trip itinerary.
    c. If traveling by a mode of transportation other than flight, still enter the details under the **Air Travel** section and provide the transportation mode in the comments.
    d. **Note**: Car Rental and Hotel Reservation segments are optional.

4. Click on the **Request Details** dropdown and select **Request Timeline**.
    a. Your request will first route to your HR supervisor.
    b. **If you are traveling for more than 5 continuous working days, please add your department chair as an additional approver**. To add an additional approver, click the **edit** hyperlink. Then, select **+ Add Step**.
    c. For international travel requests, the request then routes to the designated officer (or their delegate) for your HR organizational unit and then (for high-risk destinations) to the appropriate chancellor/president for approval.

5. Click **Submit Request**.
    a. The final review window opens. To review the export control and regulatory compliance information, click the link for your campus. Click **Accept & Submit**.

6. Each approver will need to approve the request before you can proceed with booking travel. When your request is fully approved:
    a. You'll receive an email notification that includes important information for international trips, such as medical and evacuation insurance. It is at this time that your trip can be booked through Concur or CBT.
    b. If you're booking an international trip in Concur, you'll need to enter the approved Request ID as part of the required information.
    c. If you're booking an international trip through CBT, your agent will ask you to provide the approved request ID when booking.

Step 4: Changes to Your Travel Itinerary?

Changes will require a new, approved travel request prior to booking your airfare per the following guidelines:
- A change in routing/destination. *You should enter all legs of your trip in the travel request.*
- A change in travel days by more than one day for departure and/or return.

You can recall, modify, and resubmit your original travel request, as long as it is done prior to the trip start date.