Getting Started in UTravel for Travelers

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Sign In
1. Go to http://utravel.utah.edu – this will route you to your CIS login.
2. Your User Name is your UNID @ utah.edu (ex: u1234567@utah.edu) and your Password is the same as your CIS password.
3. If you need to change your password, please do so through CIS because the accounts are linked.

Profile
Your UTravel Profile stores your personal information used for booking travel and creating expense reports.

Before you begin using UTravel it is important to update your personal information to ensure accuracy when booking travel and activating Concur features.

Key Features: Ensure accuracy from your PeopleSoft record

1. **Name:** Make sure your name matches your government issued ID or passport. The name will transfer to travel bookings made in the UTravel Concur System or the travel agency. Your first and last name is populated from your HR record. If your name is incorrect, please email travel_questions@utah.edu with the subject line, ‘Name Change – UTravel Concur’.

2. **Address:** Home address is recommended for easier mileage calculations in Expense.

3. **Phone Contact:** Registering a mobile device is required to take advantage of Concur’s mobile technology and electronic receipts as well as Duty of Care. Duty of care is a program that helps us contact you in case of emergency while on travel status. For users without a mobile device, substitute work phone.

4. **Email Address:** You will need to verify your email address to upload receipts and itineraries to the system. **Your Email 1 email address MUST be your UNID@utah.edu email address.** Once verified you can email or forward receipts to receipts@concur.com and they will be available for you to add to your expense reports. To verify – select Verify and enter the code that was sent to your email.

Verify use of any email account from which you may forward documents to receipts@concur.com
5. **Assistants and Travel Arrangers:** Make certain your Arranger “can book travel”.

Can book travel? ☑

6. **Request and Expense Delegates:** Assign someone else to Prepare, Submit, or Approve on your behalf.

7. **Credit Card:** A personal credit card is required if you chose to book a hotel through UTravel. The account will not be charged at booking and is only used to reserve/guarantee the room, and is protected and masked by the site.

8. **E-Receipt Activation:** This feature allows the auto collection for electronic receipts into the Concur system from Concur participating suppliers. To activate go to Profile, Other Settings and select E-Receipt Activation.

**Apps**

Proper use of apps will optimize features of the UTravel system.

**Concur Mobile App**

The Concur Mobile app allows you to manage your expenses in an easy, paperless fashion. For those who approve expenses, approvals may also be done in this app. Most importantly, you can capture images of your receipts and they will automatically appear in your expense report. This is the biggest efficiency gain for you and your travel arrangers.

1. To register for Concur Mobile, log in to UTravel and select your **Profile** menu in the upper right corner of your screen and click **Profile Settings**. Then, select **Mobile Registration** along the top.

2. Create a PIN in order to log in to Concur Mobile – enter your PIN in the Create PIN and Retype PIN fields and click **Set PIN**.

3. Download the Concur Mobile app onto your mobile device.

   - You can do this through your device’s app store.
   - Or, you can send an app link to your device – Use the Download the App to enter your mobile phone number or email address and click Get Started.

4. To use the Concur Mobile app, open the app on your phone and log in with your Concur Username (this is your UNID@utah.edu address) and the PIN you just created.
5. Your responsibility as a traveler is to take photos of your receipts using the ExpenseIt icon within the app.

6. After you have taken the picture of the receipt, the Concur app begins to analyze. Once the analysis has completed, the type of expense, vendor name, amount, and date will display.
TripIt Pro

TripIt Pro is an application that comes free with your Concur account (Usually $59.99/yr). It is used to keep track of your upcoming trips and help travelers stay one step ahead with real-time flight alerts, gate change notifications, reward program tracking, monitoring for availability of preferred seats, and VIP benefits.

You can register for TripIt through the App Center tab at the top of the page, or by downloading the app to your smartphone through the app store. You will need to download the app to your smartphone in order to use Tript.

If you are setting up a new account, use your unid@utah.edu address.

If you already have TripIt, you will need to connect it to your unid@utah.edu account.

NOTE: Your assistant/arranger will likely compile your expense report on your behalf.
If you would like to learn how to initiate this on your own, you may request training.

7. All receipts from the app are viewable on the website as well – in the Available Expenses section of the Manage Expenses tab. You can also locate your Available Expenses from the homepage under My Tasks.
Connecting Apps to Your Account
Apps from the App Center may require merging of accounts with your UNID@utah.edu to work properly.

To connect an app, click on the desired icon. You will then be taken to a simple connect page. Click connect and follow the instructions to set up the app. You may also be asked to verify your email. This process is the same for all apps in the App Center.

You can verify that an app is connected by the green Connected notification underneath the icon.

NOTE: Concur users should add AutoNotification@concursolutions.com to their safe sender list in Outlook. All emails sent to users from Concur come from this email address, and may end up in a junk email folder unless it's specifically added to a safe list.