

## Sign In

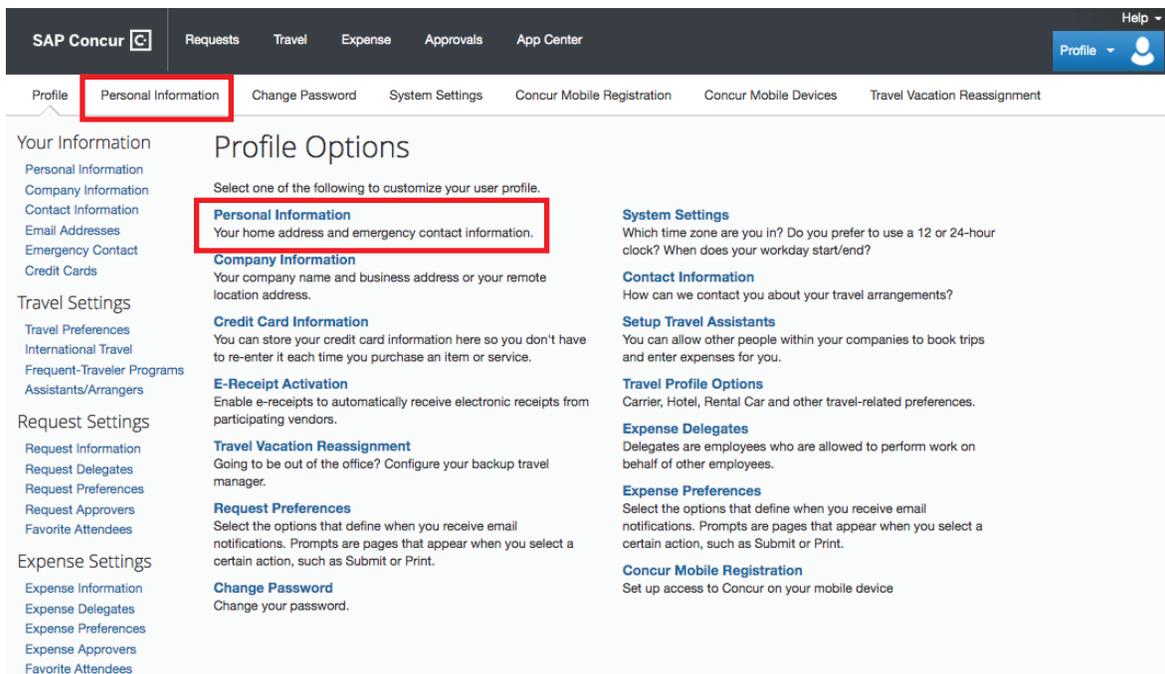
1. Go to <http://utavel.utah.edu> – this will route you to your CIS login.
2. Your User Name is your UNID @ utah.edu (ex: u1234567@utah.edu) and your Password is the same as your CIS password.
3. If you need to change your password, please contact UIT at 581-4000.

## 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.



The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' and a 'Profile' dropdown menu. Below this is a sub-navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Concur Mobile Registration', 'Concur Mobile Devices', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Request Settings', and 'Expense Settings'. The 'Personal Information' section is highlighted with a red box and contains the text: 'Select one of the following to customize your user profile. Personal Information Your home address and emergency contact information. Company Information Your company name and business address or your remote location address. Credit Card Information You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service. E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors. Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager. Request Preferences Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. Change Password Change your password. System Settings Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end? Contact Information How can we contact you about your travel arrangements? Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you. Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences. Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees. Expense Preferences Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. Concur Mobile Registration Set up access to Concur on your mobile device.

### 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](mailto: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](mailto: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](mailto: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.

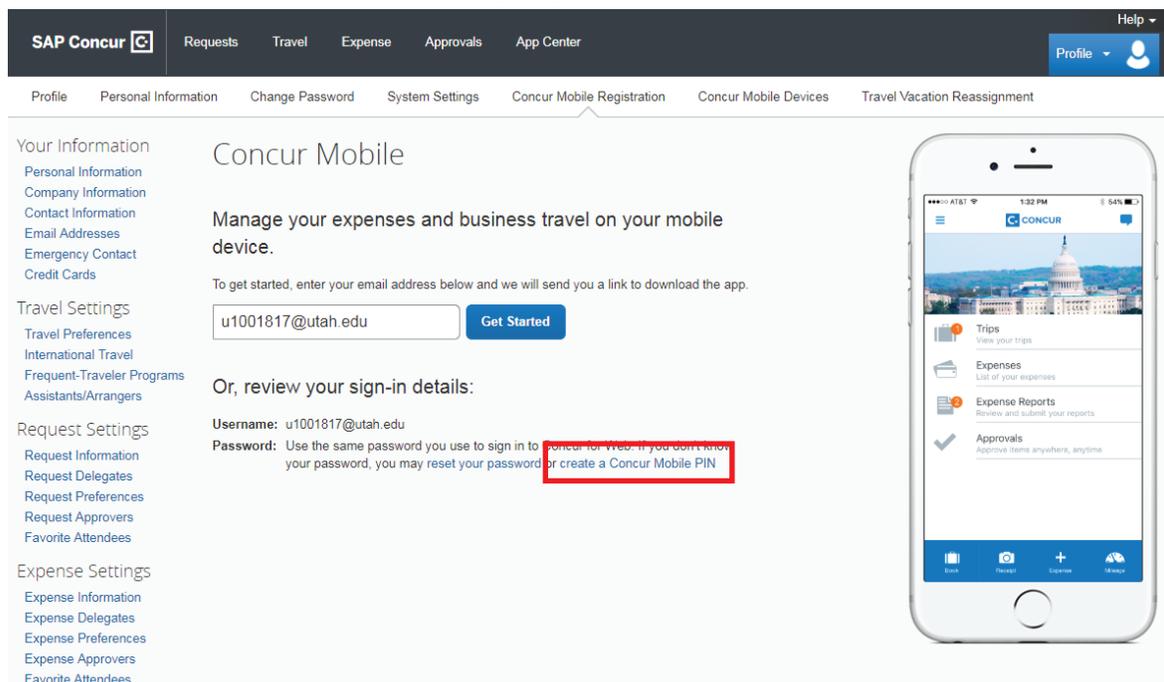
### Concur Mobile App



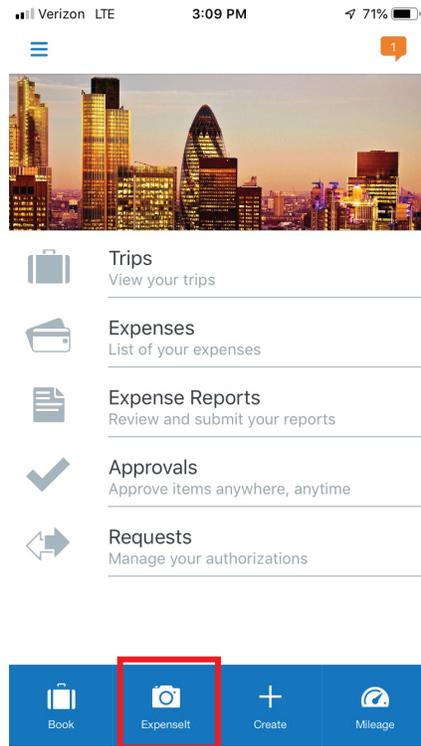
The Concur Mobile app allows you to manage your expenses in an easy, paperless fashion. For those who approve expenses, approvals may also be done in this app. Most importantly, you can capture images of your receipts and they will automatically appear in your expense report. This is the biggest efficiency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



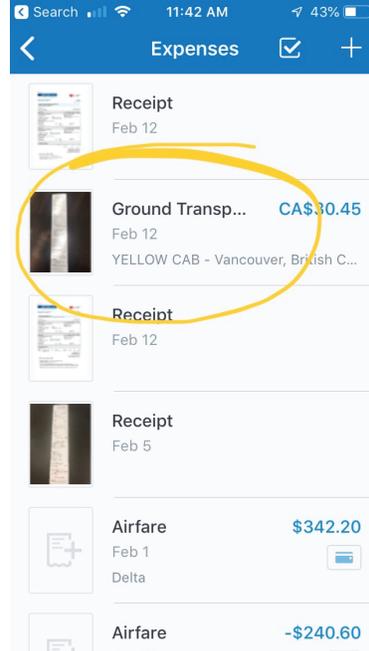
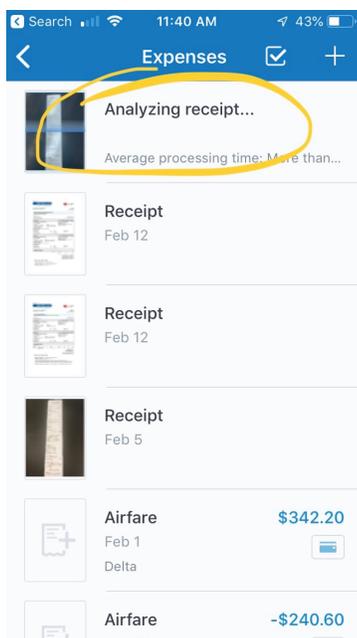
1. To register for Concur Mobile, log in to UTravel and select your **Profile** menu in the upper right corner of your screen and click **Profile Settings**. Then, select **Mobile Registration** along the top.
2. Create a PIN in order to log in to Concur Mobile – enter your PIN in the Create PIN and 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 Expenselt 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.



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**.

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with tabs: Requests, Travel, Expense (highlighted in blue), Approvals, App Center, and Locate. On the right, there is a 'Help' dropdown and a 'Profile' dropdown with a user icon. Below the navigation bar, there are two buttons: 'Manage Expenses' (highlighted in yellow) and 'View Transactions'. The main content area is titled 'Manage Expenses' and contains a table of transactions. The table has columns for checkboxes, description, category, status icons, date, and amount. The transaction 'YELLOW CAB Vancouver, British Colum...' is highlighted with a yellow box.

<input type="checkbox"/>	Description	Category	Status	Date	Amount
<input type="checkbox"/>	Delta Air Lines SALT LAKE CTY, UT	Airfare	=	01/30/2019	\$240.60
<input type="checkbox"/>	Delta Air Lines SALT LAKE CTY, UT	Airfare	=	01/30/2019	\$-240.60
<input type="checkbox"/>	Delta Air Lines	Airfare	📄 ✈️	01/31/2019	\$236.37
<input type="checkbox"/>	Delta Air Lines	Airfare	📄 ✈️	02/01/2019	\$116.28
<input type="checkbox"/>	Delta Air Lines	Airfare	📄 ✈️	02/01/2019	\$116.28
<input type="checkbox"/>	Delta Air Lines SALT LAKE CTY, UT	Airfare	= 📄 ✈️	02/01/2019	\$342.20
<input type="checkbox"/>	<b>YELLOW CAB</b> Vancouver, British Colum...	Ground Transportation	📄	02/12/2019	CAD 30.45
<input type="checkbox"/>	Southwest Airlines	Airfare	✈️	02/12/2019	\$403.92

**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.

## Triplt Pro

Triplt 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 Triplt 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 Triplt.

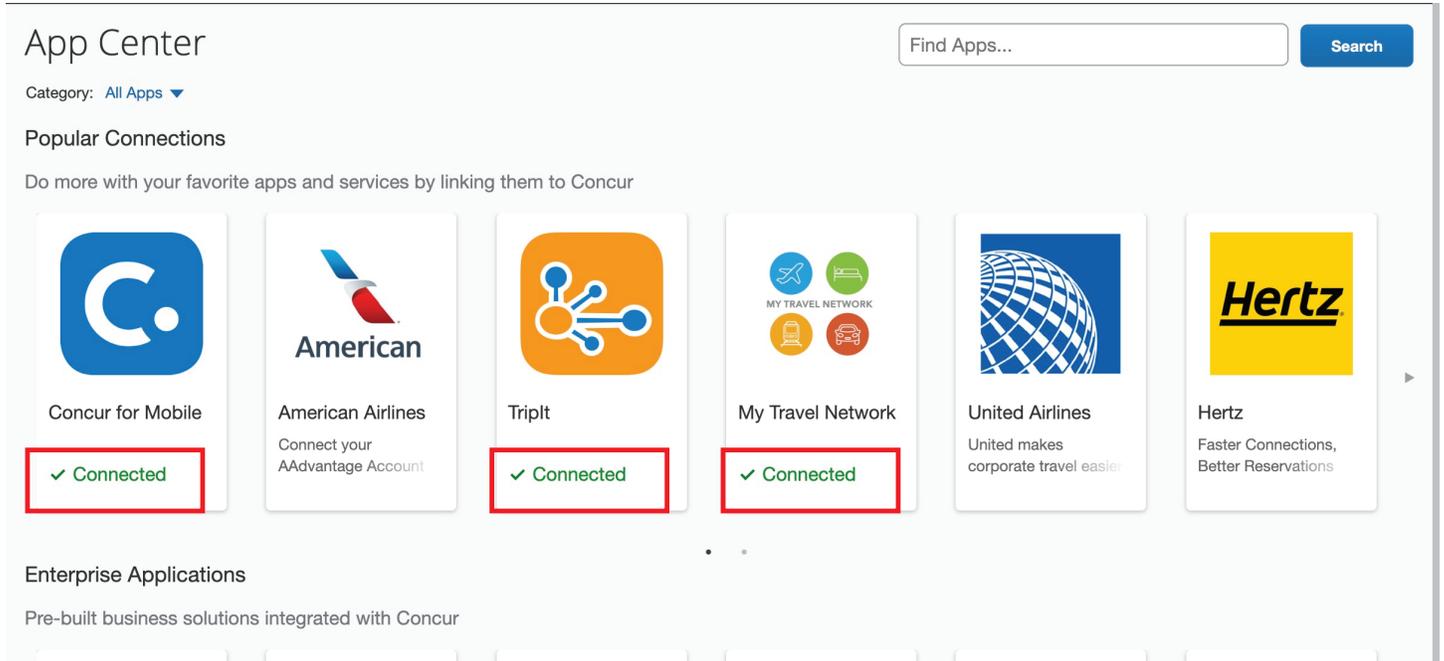


If you are setting up a new account, use your `unid@utah.edu` address.

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

## Connecting Apps to Your Account

Apps from the App Center may require merging of accounts with your UNID@utah.edu to work properly.



The screenshot shows the 'App Center' interface. At the top, there is a search bar labeled 'Find Apps...' and a 'Search' button. Below the search bar, the category is set to 'All Apps'. The main section is titled 'Popular Connections' and includes the instruction 'Do more with your favorite apps and services by linking them to Concur'. There are six app cards displayed: 'Concur for Mobile' (with a green 'Connected' notification), 'American Airlines' (with a 'Connect your AAdvantage Account' prompt), 'Triplt' (with a green 'Connected' notification), 'My Travel Network' (with a green 'Connected' notification), 'United Airlines' (with the text 'United makes corporate travel easier'), and 'Hertz' (with the text 'Faster Connections, Better Reservations'). A red box highlights the 'Connected' notification for the Triplt app.

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.



**Triplt**

The smart, organized way to travel

Connect



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

**NOTE:** Concur users should add AutoNotification@concur solutions.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.