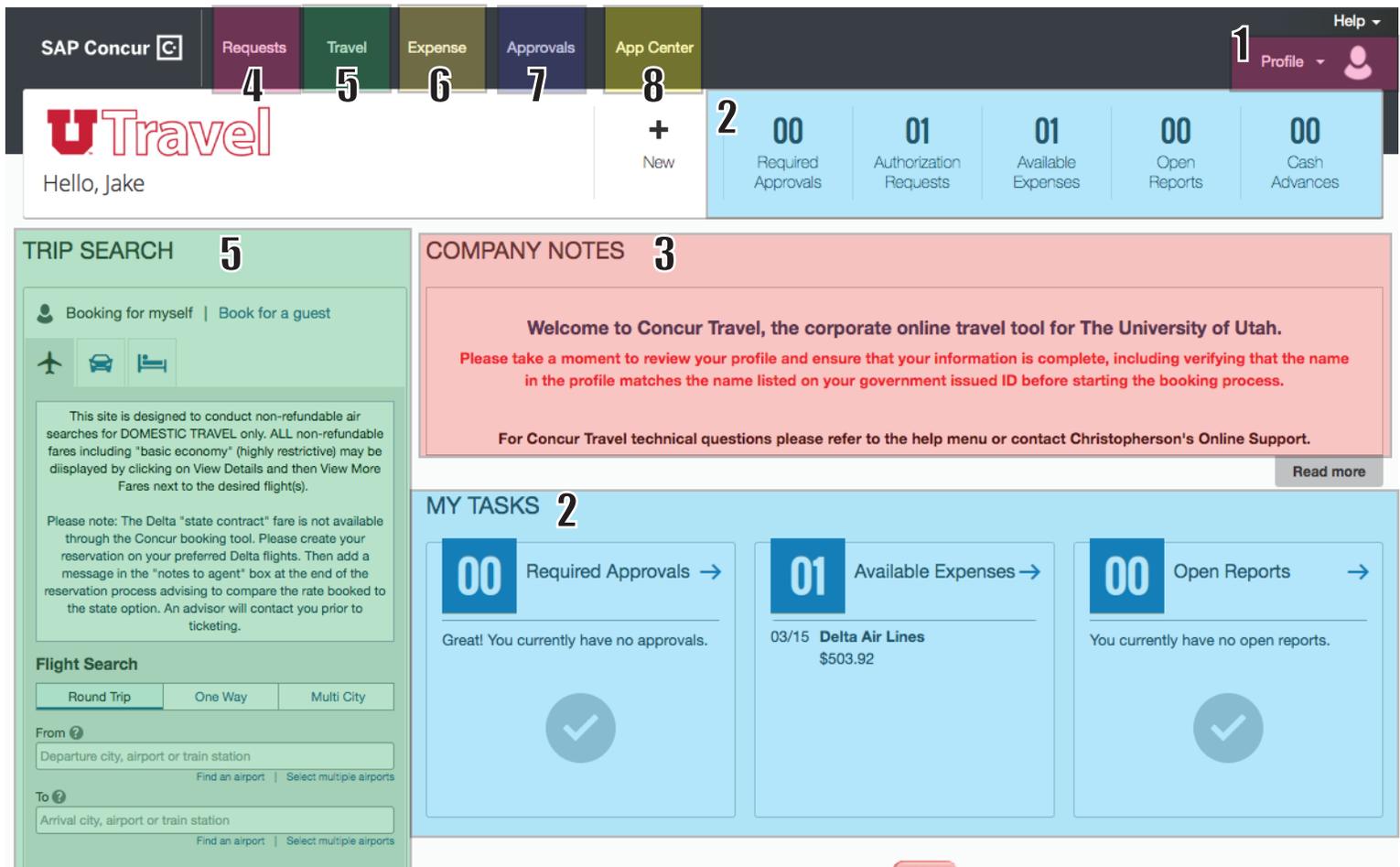


UTravel is the new paperless and mobile system for University of Utah Travel that will increase efficiency in the reimbursement process, decrease paper waste across campus, and take care of booking needs. Use this guide to gain a better understanding of the system, manage your profile, and set up your mobile apps.

Sign In

1. Go to <http://uttravel.utah.edu>
2. Currently, UTravel is only set up for University of Utah employees. Your User Name will be your UNID (ex: u1234567) and your Password will be the same as your CIS password.
3. If your screen doesn't look like the image below – you have not been given access yet. Please contact the Travel office if you feel you should have access.
4. Access will be given after completion of training and will take at least 48 hours to be activated.

Home Page



The screenshot shows the UTravel SAP Concur home page. At the top, there is a navigation bar with tabs for Requests (4), Travel (5), Expense (6), Approvals (7), and App Center (8). A 'Profile' dropdown menu (1) is visible in the top right. Below the navigation bar, the user is greeted with 'Hello, Jake' and a '+ New' button (2). A summary row shows counts for Required Approvals (00), Authorization Requests (01), Available Expenses (01), Open Reports (00), and Cash Advances (00). The main content area is divided into three sections: 'TRIP SEARCH' (5) on the left, 'COMPANY NOTES' (3) in the middle, and 'MY TASKS' (2) on the right. The 'TRIP SEARCH' section includes options for booking for oneself or a guest, icons for flight, car, and hotel, and a flight search form. The 'COMPANY NOTES' section contains a welcome message and a 'Read more' button. The 'MY TASKS' section displays three task cards: 'Required Approvals' (00), 'Available Expenses' (01), and 'Open Reports' (00).

Areas of information included on the home page:



The preferred method of booking is to start with the **Request** tab.

1. **Profile** - Your profile houses all of your information for using UTravel. Every concur user needs to update their profile. This can also be done by the Travel Arranger, except the email verification.
2. **My Tasks** - Shows your available expenses, open reports, and approvals requiring attention.
3. **Company Notes** - Where you will find any pertinent information from your organization.
4. **Request Tab** - Where you will begin your travel process and acquire a Request ID.
5. **Travel Tab** - Where you will book domestic employee flights, cars, and hotels.
6. **Expense Tab** - Where you will create your expense reports for reimbursement.
7. **Approvals Tab** - This section is given to those that are approvers, in which they will have pending approvals.
8. **App Center** - Where you can link apps to your Concur profile for a more optimized experience.

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 several menu items: 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. On the right side of the navigation bar, there is a 'Profile' dropdown menu and a user icon. Below the navigation bar, there is a sub-navigation bar with 'Profile' (selected), 'Personal Information' (highlighted with a red box), 'Change Password', 'System Settings', 'Concur Mobile Registration', 'Concur Mobile Devices', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and contains a list of settings. The 'Personal Information' option is highlighted with a red box and includes the text: 'Your home address and emergency contact information.' Other options include 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Request Preferences', 'Change Password', 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'.

Key Features:

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 or the travel agency. Your first and last name is populated from your HR record. If your name is incorrect, contact your HR representative to update.
2. **Address:** Recommended for easier mileage calculations in Expense.
3. **Phone Contact:** A work and home phone number are required. Registering a mobile device is not required but recommended to take advantage of Concur's mobile technology and electronic receipts along with Duty of Care.
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.** To verify – select Verify and enter the code that was sent to your email.



Once verified you can email receipts to **receipts@concur.com** and they will be available for you to add to your expense reports.

5. **Assistants and Travel Arrangers:** This is where someone can designate an Arranger to book travel or become the designated Booking Assistant. A Traveler can have multiple Arrangers.
6. **Credit Card:** A personal credit card is required if you chose to book a hotel through UTravel. The account will not be charged and is only used to reserve/guarantee the room.
7. **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.
8. **Expense Delegate:** These are individuals who have been assigned to do certain tasks on your behalf. Users are allowed to assign **temporary delegates** here. Please contact the Travel office to assign or change **permanent delegates**.

Apps

Proper use of apps will optimize features of the UTravel system. Please refer to #8 on page 1 to locate the App Center.

Concur Mobile App

The Concur Mobile app allows you to manage your expenses in easy, paperless fashion. You can capture images of your receipts and they will automatically appear in your Expense Report.



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 - click the **Create a Concur Mobile PIN** link and follow directions to set your 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.

SAP Concur | Requests | Travel | Expense | Approvals | App Center | Profile | Help

Profile | Personal Information | Change Password | System Settings | Concur Mobile Registration | Concur Mobile Devices | Travel Vacation Reassignment

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers

Concur Mobile

Manage your expenses and business travel on your mobile device.

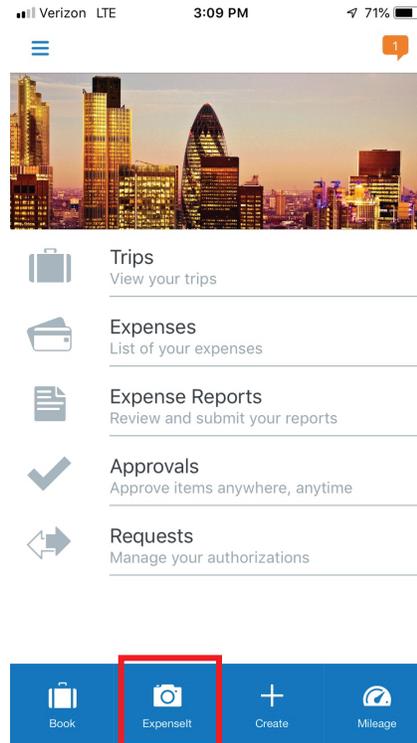
To get started, enter your email address below and we will send you a link to download the app.

[Get Started](#)

Or, review your sign-in details:

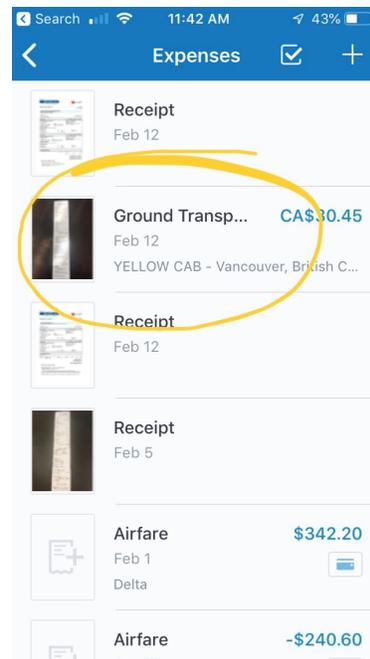
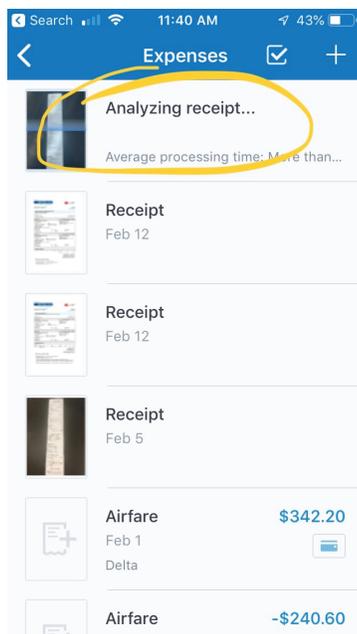
Username: u1001817@utah.edu
Password: Use the same password you use to sign in to Concur for Web. If you don't know your password, you may reset your password or [create a Concur Mobile PIN](#)

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.



NOTE: Concur users should add AutoNotification@concur.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.

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 user profile icon and a 'Help' dropdown. 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.

Transaction Description	Type	Amount	Date
Delta Air Lines SALT LAKE CTY, UT	Airfare	\$240.60	01/30/2019
Delta Air Lines SALT LAKE CTY, UT	Airfare	\$-240.60	01/30/2019
Delta Air Lines	Airfare	\$236.37	01/31/2019
Delta Air Lines	Airfare	\$116.28	02/01/2019
Delta Air Lines	Airfare	\$116.28	02/01/2019
Delta Air Lines SALT LAKE CTY, UT	Airfare	\$342.20	02/01/2019
YELLOW CAB Vancouver, British Colum...	Ground Transportation	CAD 30.45	02/12/2019
Southwest Airlines	Airfare	\$403.92	02/12/2019

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



Levels of Approval

The levels of approval will be determined by your ADSC (Account Distribution Shortcut "Activity or Project number").

- Level 0 is the Org Head of the activity or project selected.
- Level 1 is one level higher than the Org Head.
 - Level 1 is equivalent to a Dean, Director, or Chair.
- Level 2 is two levels higher than the Org Head.
 - Level 2 is equivalent to a Vice President.
- Account Executives are responsible for expenses on Activities and Projects.
- Org Heads are responsible for ALL Activities and Projects that report to their org.