SJSU | ADMINISTRATION AND FINANCE

Dear Campus Community,

Concur will soon become the university's new system for travel authorization, booking, and expense reimbursement. While the overall travel process remains familiar, Concur introduces new tools that make it easier to plan trips, manage receipts, and submit reimbursements. Travelers will be empowered to book travel on their own using the Concur website or mobile app.

The Three-Step Travel Process

1. Submit a Travel Request

Before making travel arrangements or incurring expenses, travelers must submit a Travel Request in Concur.

- Enter basic trip information.
- Use the AI Estimate Generator to estimate costs.
- Obtain required approvals from your manager and Delegation of Authority (DOA) approvers.

2. Book Your Travel

Travelers can choose from several booking and payment methods depending on their needs (details below).

3. Complete an Expense Report

After travel is complete:

- Create an Expense Report directly from your approved Travel Request.
- Review and submit all travel expenses.
- Attach any required receipts. Obtain
- final approvals.

When using Concur-integrated booking methods, many receipts and expenses are automatically loaded into Concur, reducing manual data entry.

Which Travel Booking Option Is Right for You?

Important Update: **Effective with the transition to the new system, department administrators and analysts will no longer have the ability to utilize their travel cards to arrange travel bookings for other staff members.**

Moving forward, travelers will have three options to book travel on their own:

1. Concur Travel Card

Best for eligible frequent travelers who want automated expense syncing and minimal out-of-pocket costs. Don’t need a Travel Card anymore? Please reach out to travel@sjsu.edu to cancel your Travel Card.

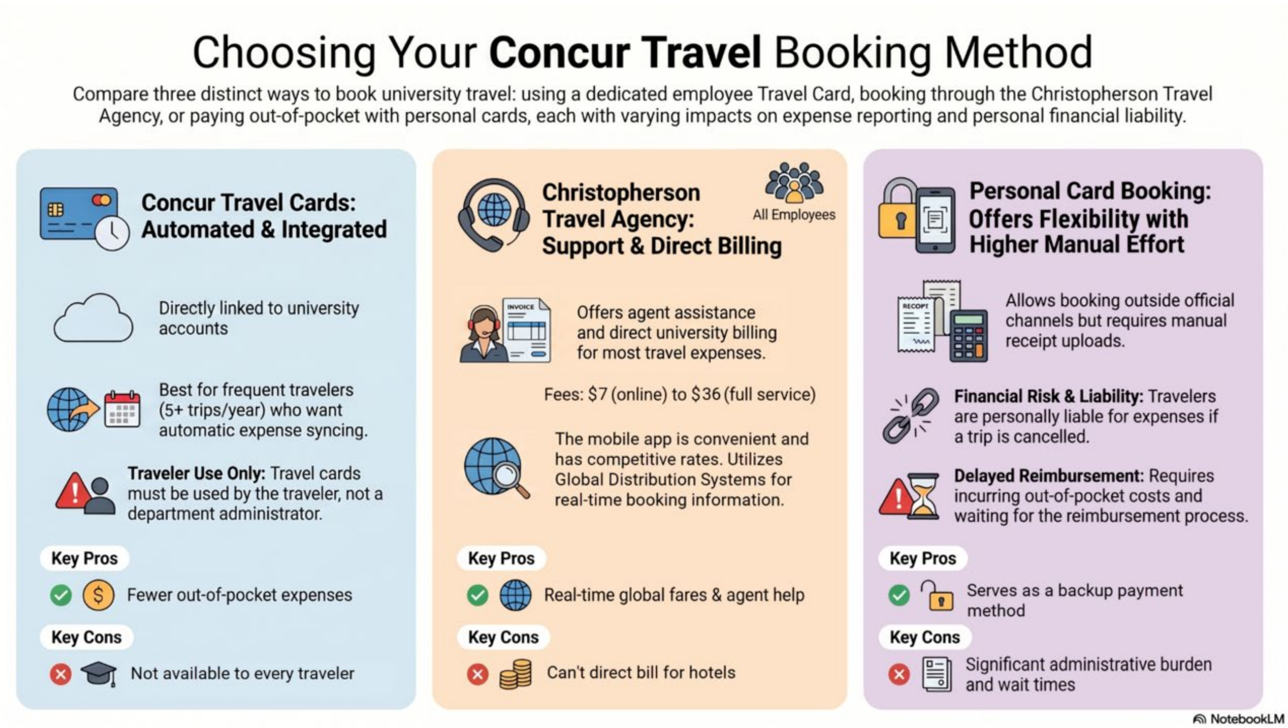
2. Christopherson Travel Agency

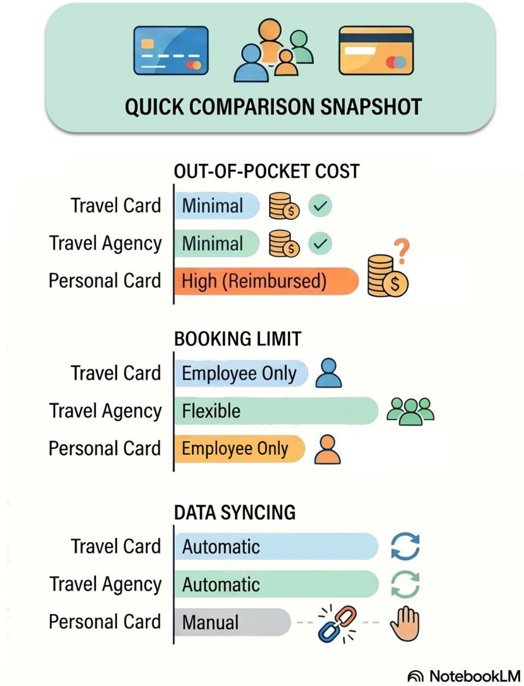
Available to all employees and ideal for travelers seeking booking assistance, direct billing, group travel support, or complex itineraries.

3. Personal Credit Card

Provides flexibility but requires manual receipt management and reimbursement processing. Travelers assume personal financial responsibility for charges if a trip is canceled.

Here are some handy infographics for your ease of reference:





Additional Information

Delegates may continue assisting travelers with travel-related activities in Concur.

Training opportunities, job aids, and additional implementation resources will be shared prior to go-live. Check out our resources and project website for more information.

Concur Project Website

FABS Fiscal Year Calendar/Concur Training Calendar

What You Need to Know - Travel Booking

Concur Toolkit

Questions and Support
travel+concur@sjsu.edu
financeconnect+concur@sjsu.edu

Modify My Travel with Christopherson:

- **Phone:** (800) 600-3737
- **Email:** trips@cbtravel.com

Thank you for your partnership as we transition to Concur and modernize the university's travel and expense processes.

Warm Regards,

Sara Bonakdar, Associate Vice President, Strategic Business Services
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