Why use Pioneer Travel & Expense?

- Report business expenses and request reimbursements. P-Card Charges & Out-of-Pocket Reimbursements are now combined and submitted in one electronic Expense Report. No more paper P-Card packets or forms!
- Request International travel (replaces DU Passport)
- Request a Travel Advance (no more Cash Advance Request forms)
- Request a new P-Card or Declining Balance card (use “Request” tab – P-Card training no longer required)
- Book Travel (get discounts on flights, hotels, rental cars & be supported during travel by our dedicated Travel Agency, Christopherson Business Travel)

First Steps: Login and Set up Your Profile

- Go to PioneerWeb>Employee>Pioneer Travel and Expense and Click Sign-In Link
- In Concur, in upper right corner click on Profile>Profile Settings>Personal Information
- VERY IMPORTANT STEPS
  - Confirm that your First, Middle and Last Name matches your Travel Docs (email SharedServices@du.edu for name changes)
  - Complete all required fields (“Required” alert remains red even after entry)
  - Verify your Email Address
  - Create your Mobile PIN and Register your Mobile Device
  - Activate E-Receipts
  - Set up your Delegates

Steps to Create your Expense Report

When? Submit one expense report monthly (for non-travel expenses) or one per trip (for travel expenses)

1. Create the Report Header (select the Report/Trip Purpose and Div-Org-Fund-Activity-Location which will default to all expenses - Can be changed later at the individual expense level). Header information can be changed at any time by selecting “Details” within the Expense Report screen.
2. Pull in Credit Card charges that fall within the Report Header Start and End dates
3. Enter any Out-of-Pocket Reimbursement expenses that fall within the Report Header dates.
4. Attach necessary Receipts
5. Check and address any Alerts
6. Review Report Summary (Click “Print/Email” & Submit for Approval)
Expense Type Tips

- Mileage Reimbursement (can use the Map to calculate exact mileage, select round trip, or deduct normal commute)
- Per Diem
  - Select “Per Diem” option from pop-up window after entering Header information –or–
  - Within Expense Report select “Details” and Assign or Enter a New Itinerary
  - Select “Expenses & Adjustments” for Per Diem calculation table
- Hotel Lodging Itemization (Use “Itemization” tab to split Hotel Charges)
- Group Meals & Entertainment (need to list attendees if less than 10 or select “10+ Attendees”)
- Accidentally charge a personal expense on your P-Card? Change Expense Type to “Personal Non-Reimbursable”
- Need to Allocate an Expense to FOAP account different than the default in the Header? Select “Allocate” button

Receipt Capture & Attaching

- Paper Receipts – Scan to your computer or e-mail, forward image to receipts@concur.com. Receipt will upload to your account.
- On the Concur Mobile App – Select the camera icon Expenses button to take a picture of receipt. Receipt will be added to your report as an expense and will attach to the associated transaction when it appears in the system.
- E-Receipts from Merchants will automatically appear in your Available Receipts

Travel

- Forward your Itinerary to Plans@concur.com. Itinerary is required for Per Diem calculations. When using Concur to book travel, itinerary automatically imports!
- Forward your emailed hotel folio to receipts@concur.com
- Use the Concur Mobile App while on the road to capture your receipts
- Download Trip-It Pro! to help you track gate changes, flight delays, directions, baggage claim locations, etc.
- International Travelers – Must Submit a “Request” prior to travel (Replaces DU Passport). Request info entered will feed to Expense Report Header
- Use “Request” to get a Travel (Cash) Advance
- All Airfare booked through Concur will be charged to a DU Agency Card and feed directly into your Expense Report
- Christopherson Business Travel – Call them to book complicated trips or if you need support while traveling.

Need Help?

- Contact Service Desk at SharedServices@du.edu or 303-871-7420
- Go to PioneerWeb to find Quick Guides, FAQ’s, Training Class and Drop-In Schedule and other Resources PioneerWeb>Employee>Administrative Processes>Pioneer Travel and Expense

Your Notes

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