CALIFORNIA STATE UNIVERSITY CHICO
FINANCIAL SERVICES

ACCOUNTS PAYABLE
KENDALL HALL ROOM 208
CHICO, CA 95929-0243
530-898-6426
www.csuchico.edu/ap

Concur
Reference Guide
Mobile Applications

Table of Contents

SAP Concur

Concur for Mobile complements the web based solution, allowing you to manage anything expense and or travel related, wherever you are. From booking and managing itineraries to capturing receipts and submitting expense reports, you can now do it all in one app with Concur.

With the SAP Concur app, you can:

- Manage the entire travel and expense process on-the-go

- Book a flight / hotel / car quickly and easily from anywhere

- Never lose another receipt when you capture/store photos of your receipts

- Quickly review and approve reports and travel requests

- Add attendees to business meetings or meals

- See customized hotel suggestions

- Access and manage your itinerary on the road

- Integrate your itinerary with the TripIt app

Signing into SAP Concur Mobile App

There are two ways to set up Concur Mobile App. Currently, campus users may have two Concur profiles, one for our new Concur Travel and Expense platform and one for our prior platform with CalTravelStore. Since a user's email is tied to both instances the mobile app does not effectively connect to the right instance without communicating a company code. Once all profiles have been migrated from one instance to the other the company code should not be required. At this time it is the most efficient way to access the app that is designed to be used with the new Concur Travel and Expense platform.

To set-up access to Concur Mobile App – using online web based platform:

1. In Concur, click **Profile** > **Profile Settings** > **Concur Mobile Registration**.

Profile Options

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.

Personal Car
Personal Car

Concur Mobile Registration
Set up access to Concur on your mobile device

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.

Change Password
Change your password.

2. Enter campus email and click get started button. This should generate an email with instructions on how to download app. Take note of the company code.

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.

bobloblaw@csuchico.edu   **Get Started**

Or, review your sign-in details:

To sign in to the Concur Mobile app, simply tap on "Company Code Sign In" after downloading the Concur Mobile app and enter your company code. Then follow the instructions per your company procedure for single sign on.

Company Code

3. Download and open SAP Concur mobile app. Sign is the company code and then enter the credentials you use everyday to access your work computer/devices (SSO).

To set-up access to Concur Mobile App – using phone:

1. Download app from app store on your phone
2. Open app and select "SSO Company Code Sign In"

SAP Concur C·

Sign in to Concur

Work Email or Username

Next

Forgot Password?

— OR —

SSO Company Code Sign In

3. Enter company code located in profile above
4. Select Chico from list of CSU campuses
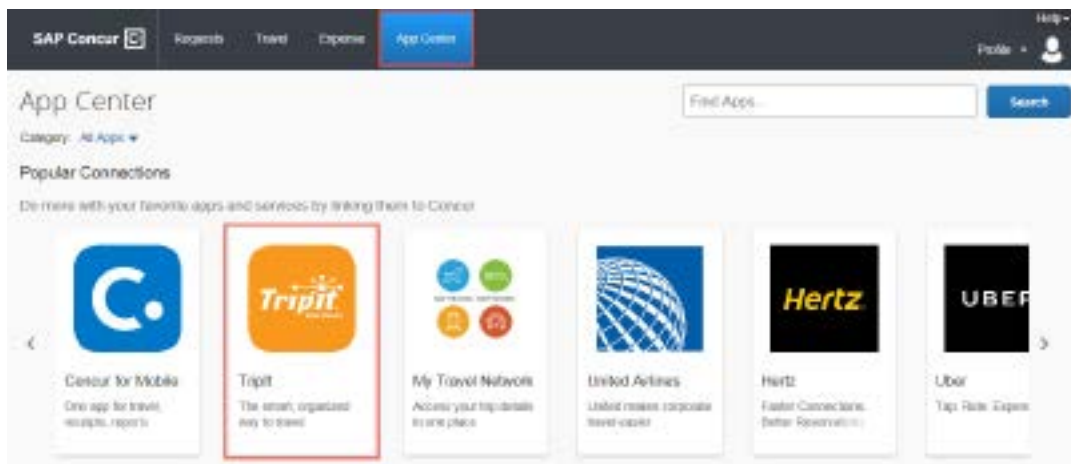5. Enter credentials you use every day to access your work computer/devices (SSO)

TripIt® from Concur instantly organizes all your travel plans in one place. Simply forward travel confirmation emails to plans@tripit.com and TripIt will create a master itinerary for each of your trips. Now you can access your plans anytime, anywhere.

Key Features:

- After booking, simply forward your confirmation emails to plans@tripit.com and TripIt will instantly create a master itinerary for each of your trips.
- You can opt to allow TripIt to automatically import travel plans from your Gmail, Google Apps, Outlook.com or Yahoo! mail inbox, so you don't have to forward confirmation emails.
- Access your travel plans on your smartphone, tablet, computer or wearable device anytime, anywhere.
- Sync TripIt with your calendar, so your travel plans show up alongside other meetings or events.
- Easily share specific plans, or your entire itinerary, with anyone.
- Real-time flight alerts, seat tracking, alternate flight finder, fare refund notifications, point tracking, and more.
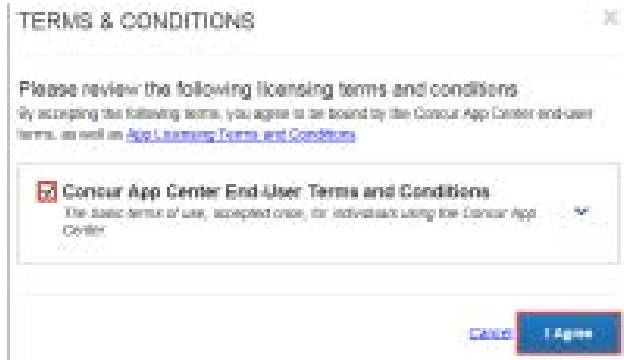
Signing into Tripit Pro

Once you are in Concur, you click the **App Center**, then click the **Tripit** App Icon.
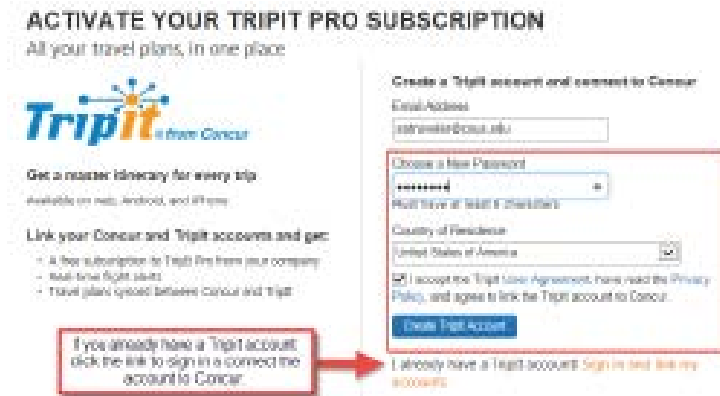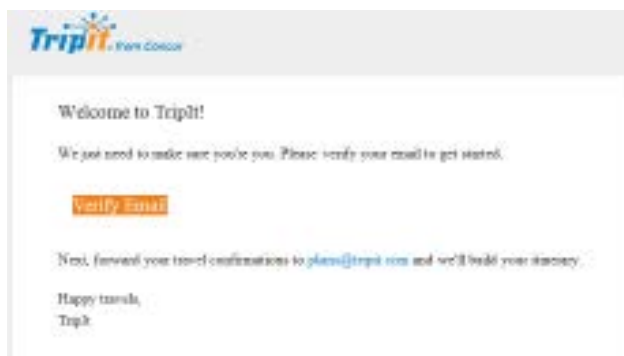

Click the blue **Connect** button.

Check the box next to Concur App Center End-User Terms and Conditions and then click the blue I Agree button for the Terms & Conditions.

Create a New Password for the Tripit App and check box accepting the terms and condition. Then click the blue Create Tripit Account. If you already have a Tripit Account, click the orange Sign in link and follow the instructions to connect your account to Concur.

An email will be sent from Tripit to verify the email address entered. Open the email and click Verify Email.

Tripit now should be connected to Concur. If the account did not link, click Connect and at the bottom of the Active Screen click the orange Sign in and link my accounts. Enter in the Email address and the password you created and then click Link my Accounts. Close the window.
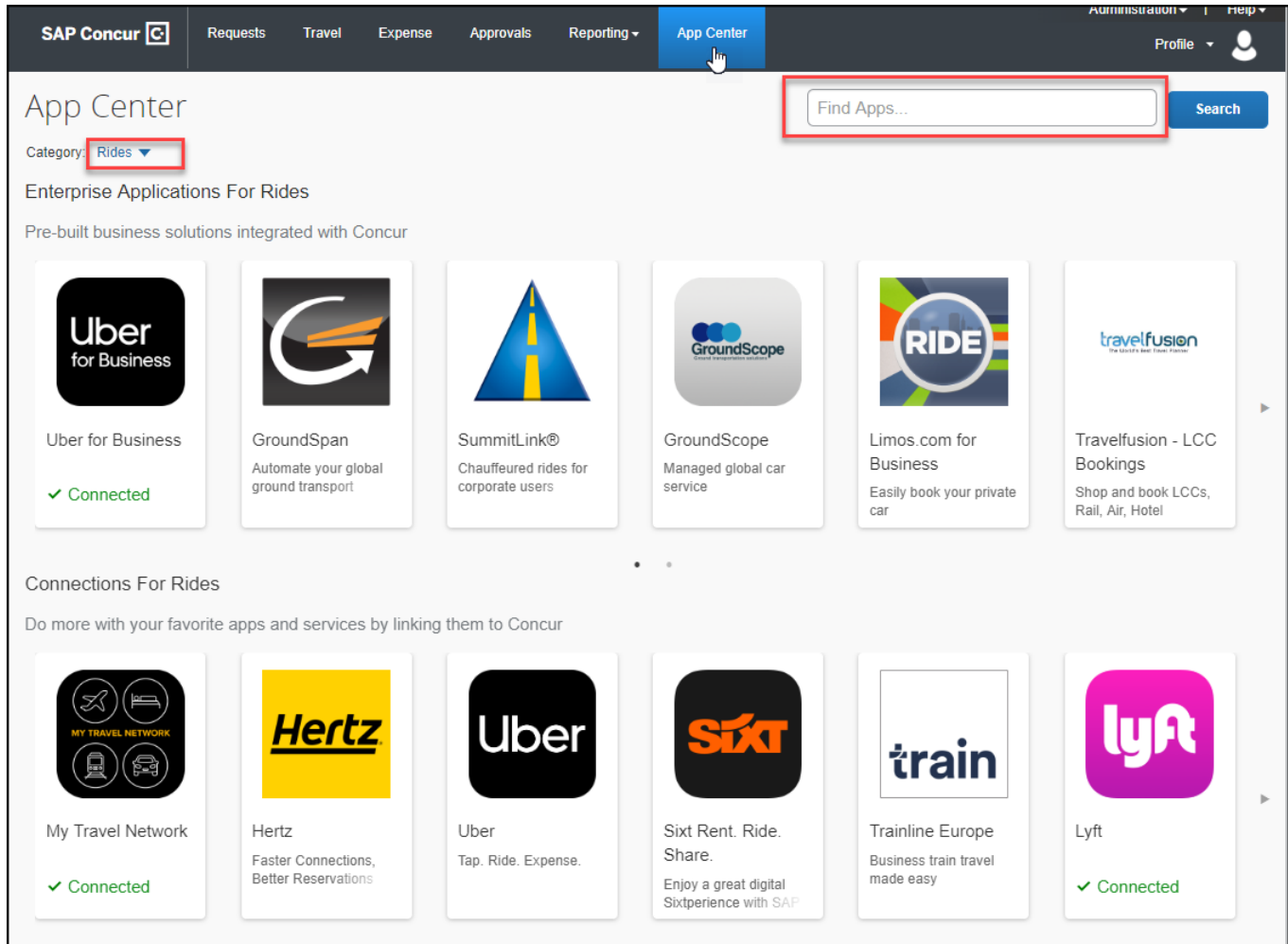
Concur App Center

Concur has many travel partners. As such, there are many partner relationships with company specific applications that can be utilized and connected to your Concur profile for business transactions.

As an example, a traveler can connect their business ground transportation account to Concur. As the app is used to secure transportation (i.e. Lyft) the related receipt will be automatically stored in the travelers list of available receipts that can be used to recall and support trip expenses.

To connect business applications visit the Concur App Center when logged into Concur.

Once you are in Concur, you click the **App Center,** then search for a specific app, or choose an app category:

Once specific app is selected, click the blue **Connect** button and follow prompts to finish connection. Once done you should see that app shows connected like example below.