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## Navigating Concur

### Exploring the Home Page

Section	Description
Quick Task Bar	Provide direct access to create or approve an expense report, authorize a travel request, apply available electronic expenses to an expense report, or access incomplete expense reports.
Profile	Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device.
Trip Search	This section provides the tools you need to book a trip with any or all of these: <b>Flight:</b> Use to book a flight. You can also book hotel and reserve a car at the same time. <b>Car, Hotel, or Rail:</b> Use to book hotels, reserve rental cars, etc. if not including them while booking a flight ( <b>Flight</b> tab).
Alerts	This section displays informational alerts about Travel features.
Company Notes	Displays University specific information.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists <b>Open Requests, Available Expenses, Open Reports</b> and <b>Required Approvals</b> .

To return to the home page from any other page, click the SAP Concur logo on the top left of the screen.

The screenshot shows the SAP Concur Home Page for a user at The California State University. The top navigation bar includes links for Requests, Travel, Expense, App Center, and a Quick Task Bar. The main content area is divided into several sections:

- TRIP SEARCH:** A section for booking travel, including a Mixed Flight/Train Search form with fields for From, To, and Search.
- ALERTS:** A section displaying informational alerts, such as a message about a free TripIt Pro subscription.
- COMPANY NOTES:** A section displaying company-specific information, including a Concur Training Toolkit link.
- MY TASKS:** A section displaying a list of tasks, including Open Requests, Available Expenses, and Open Reports.
- MY TRIPS (0):** A section displaying a list of upcoming trips, currently showing 0 trips.

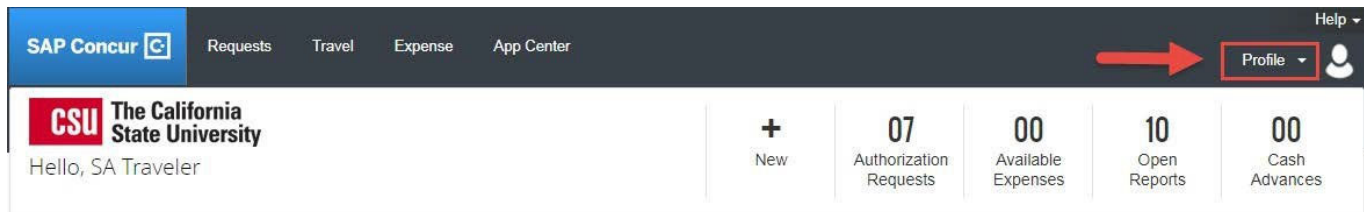
The Quick Task Bar at the top right provides direct access to various functions, including New, Authorization Requests, Available Expenses, Open Reports, and Cash Advances.

# Concur Travel Profile

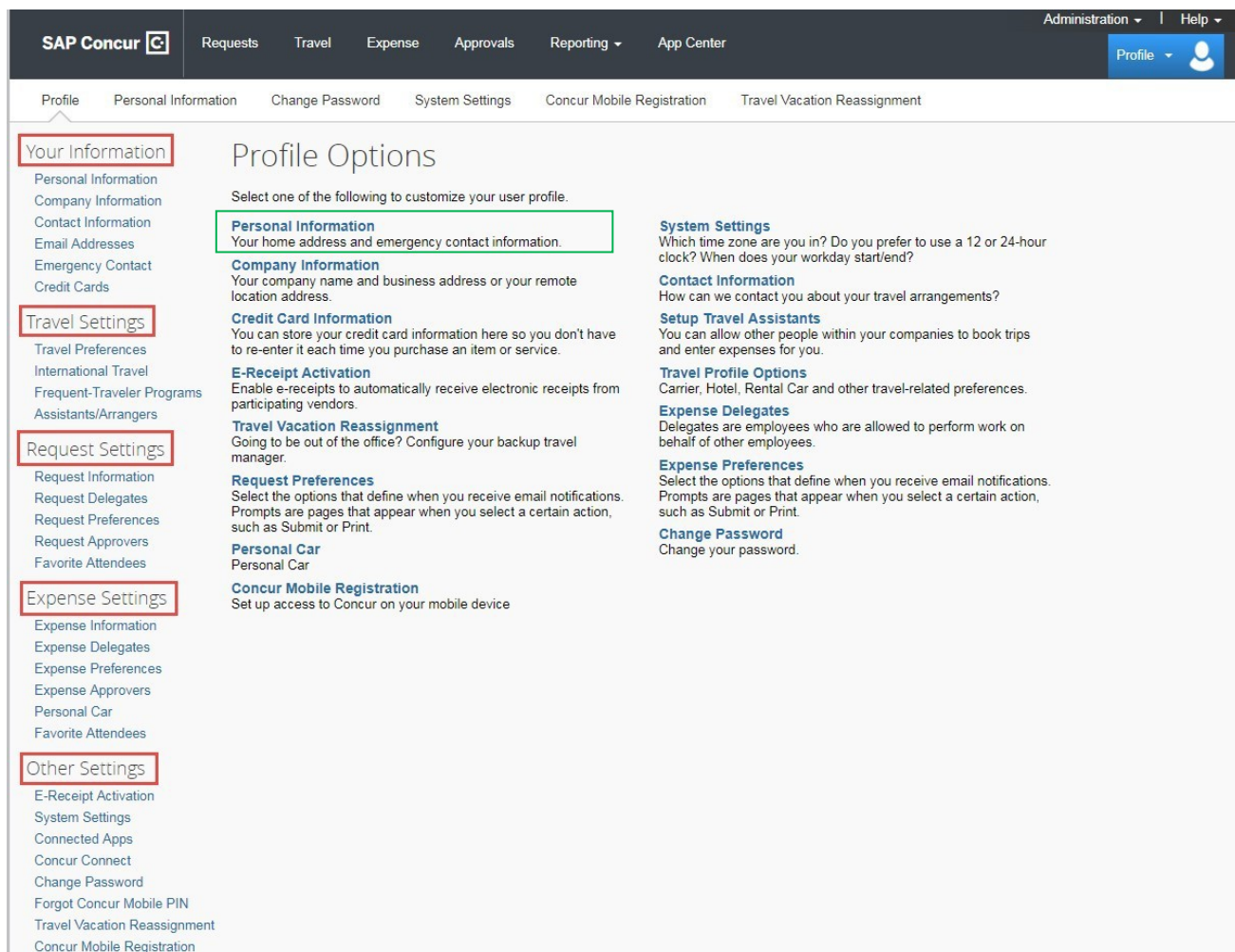
## Updating Your Profile

Use the profile options to set or change your personal preferences. To access your profile information:

1. Click **Profile > Profile Settings**. The **Profile Options** page appears.



2. You will see five categories of settings: **Your Information**, **Travel**, **Request**, **Expense**, and **Other Settings**. Select Personal Information link.



## Personal Information

### Name – **Required**

*The complete name should match your government issued photo ID, such as a driver's license or passport, which you will present to airport security. If first/last name are incorrect, please contact the Human Resource Department to update your record.*

- First and Last name will be populated from your University HR record.
- Add Middle Name and, if applicable, Suffix to match your government issued ID.

### Company Information – automatically populates

### Work & Home Address

- Enter work address **Assigned Location**. Check box next to **Address same as assigned location**.
- Enter home address– **Optional**

### Contact Information – **Required**

- Enter a work and home phone number. Your work extension will be automatically populated, please update as necessary.
- **We *highly recommend* you enter your mobile phone number.**  
A mobile device will allow you to **receive text messages from Concur** informing you of any cancelled or delayed airline flights, regardless of the airline booked, in addition to informing you of potential risks in your travel area.

Contact Information				Go to top
Work Phone <b>[Required**]</b>	Work Extension	Work Fax	2nd Work Phone/Remote Office	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home Phone <b>[Required**]</b>	<input type="text"/>			
Pager	Other Phone			
<input type="text"/>	<input type="text"/>			
Mobile Phone Country	Mobile Phone			
United States of America (+1) ▼	<input type="text"/>			

### Email Addresses – **Required**

Email Addresses					Go to top
Please add at least one email address.					
<a href="#">▶ How do I add an email address?</a>					
<a href="#">▶ Travel Arrangers / Delegates</a>					
<a href="#">▶ Why should I verify my email address?</a>					
<a href="#">▶ How do I verify my email address?</a>					
<div style="text-align: right;"><a href="#">+ Add an email address</a></div>					
	Email Address		Verify	Contact?	Actions
Email 1	satraveler@csus.edu	Not Verified	<a href="#">Verify</a>	Yes	<a href="#">✎</a>
Email 3	sacstatetravel@csus.edu	Verified	<a href="#">Disable Verification</a>	Yes	<a href="#">✎</a> <a href="#">🗑</a>

## Verify your email address! *Important!*

- Your @csuchico.edu email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the **Verify** link. By verifying your email address, Concur can associate your email address with your Concur account.
- Once you verify your email address, you will be able to forward any electronic receipts to [receipts@concur.com](mailto:receipts@concur.com). They will then be displayed in the **Available Receipts** in the Expense portion of the application. It also enables itinerary information to be emailed to [plans@concur.com](mailto:plans@concur.com).
- Additional work and personal email addresses can be added by clicking **Add an Email Address**. Enter the email address and select whether you want travel notifications to be sent to that email. Click **OK**.

### To verify the email address:

1. Click **Profile > Profile Settings > Personal Information**.
2. Scroll down to **Email Addresses**.
3. Click the **Verify** link.

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

[+ Add an email address](#)

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 bsaseen@csuchico.edu	Not Verified	<a href="#">Verify</a>	Yes	

4. Check your email for a verification message from Concur.

SAP Concur

Welcome [redacted]  
to Concur Email Verification!

You have requested that an email address in your Concur profile be verified. The next step is to log in to Concur and navigate to your Profile > Email Addresses section. Copy the verification code listed below, and paste it into the adjoining field, as shown here:

Verification Code: 8 [redacted] 3

Example  
myemail2@company.com

☒ Check E-Mail for Code [Resend](#) | [Cancel](#)

Enter Code

You are now ready to start sending emails to Concur.

If successful, then you are ready to start forwarding trip E-Mails to Concur.

For additional support, contact your Travel Administrator or Helpdesk.

Cordially,  
Your Concur Team

5. Copy the code from the email message into the **Enter Code** box next to the email address.

**Email Addresses** Go to top

Please add at least one email address.

[▶ How do I add an email address?](#)  
[▶ Travel Arrangers / Delegates](#)  
[▶ Why should I verify my email address?](#)  
[▶ How do I verify my email address?](#)

+ Add an email address

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 bsaseen@csuchico.edu	✓ Check email for code	Resend   Cancel	Yes	

Enter Code

8:  N OK

6. Click **OK**.

**Emergency Contact – *Optional*** however, when traveling, if there should be an emergency, our travel agent, Christopherson Business Travel will have access to the **Emergency Contact** information.

**Travel Preferences – *Optional***, but recommended for frequent travelers

If you participate in Frequent Traveler Rewards programs, click Add a Program.

1. Enter air, car rental, and hotel Frequent Traveler program information.
2. Click “**I Agree**” to the terms and conditions.

### Gender and Date of Birth - *Required*

If you have a TSA Pre-check number, it can be entered.

### TSA Secure Flight

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender **[Required]**  
☐ Male ☒ Female

Date of Birth (mm/dd/yyyy) **[Required]**

DHS Redress No.

TSA Pre Known Traveler Number

Save

### International Travel: Passports and Visas – *Recommended for International travelers*

For international travel, entering Passport or International Visa information ahead of time will allow it to be available when using the system to book travel.

1. Click **Add a Passport** or **Add a Visa**.
2. Enter Passport or International Visa Information.
3. Click **Save**.





## To add a delegate:

1. Click **Profile > Profile Settings**, on the left hand side of the page under the Request Settings header click **Request Delegates**.

The screenshot shows the SAP Concur 'Profile Options' page. In the left-hand navigation menu, under the 'Request Settings' section, 'Request Delegates' is highlighted with a red circle. The main content area is titled 'Profile Options' and contains several sections: 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Request Preferences', 'Personal Car', and 'Concur Mobile Registration'. On the right side, there are sections for 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Change Password'.

2. On the **Request Delegates** page, click **Add**. The search area appears.
3. Type at least the first three letters of the employee's name to search for the person you wish to add as a Delegate, and click **Add**.
4. Check the boxes that correspond with the permissions you are granting to the delegate.  
(\*Recommended permissions for Delegates)

The screenshot shows the 'Request Delegates' page. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below these are buttons for 'Add', 'Save', and 'Delete'. A text box explains: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below this is a search bar with the text 'Search by employee name, email address, employee id or login id'. The search bar contains the text 'Khangura, Daljit' and an 'Add' button. Below the search bar, a text box explains: 'Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' Below this is a table with columns for permissions and a row for the delegate 'Khangura, Daljit'.

	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> Khangura, Daljit daljit.khangura@csus.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Option	Description
*Can Prepare	If selected, the delegate can create expense reports and requests on your behalf.
*Can View Receipts	If selected, the delegate can view receipt images on your behalf.
*Receives Emails	If selected, the delegate receives a copy of each email that you receive, as a traveler. Does not include emails associated with approval queue.
Can Preview for Approver	If selected, the delegate can preview/check requests and expense reports on behalf of another employee. This delegate cannot approve the request/expense
Receives Approval Emails	If selected, the delegate receives a copy of each approval-related email that you receive. They cannot act on submissions but can help track activity.
(*) Can Approve	<b>DO NOT USE</b> , our approval flow is defined by other systems behind the scenes.
(*) Can Approve Temporary	If selected, the delegate can approve expense reports and requests on your behalf but only for the specified period. If you select this option, you must also select beginning and ending date. This is useful for coverage during vacations.

*(\*) The option to delegate approver rights will only be available for Approvers in the system. The approver's rights can also only be delegated to another user who also has approval rights in the system. This function can be used for times when an approver is unavailable and approval tasks will be covered by another person in their absence (i.e. Dean unavailable and approvals would be routed to Associate Dean).*

5. Click **Save**.

6. To **delete a delegate** click the checkbox to select the person, click **Delete**, and confirm deletion.

If you are updating a profile as a request delegate for another employee (delegator), any changes you make on this page affect only the delegator and does not change your personal information.

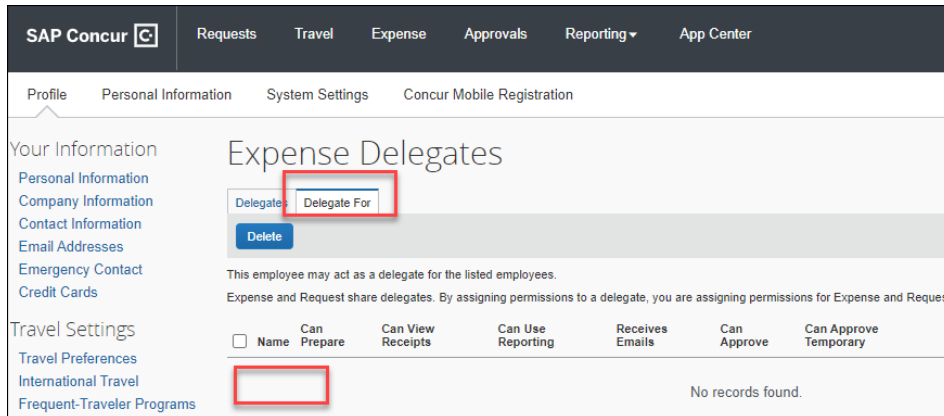
A traveler can set up a delegate to enter Travel Requests and Expense reports. Once the Request or Report is built, the Delegate can use the "Notify Employee" button to let the traveler know the Request or Report is ready to submit.



***The Traveler must certify and submit their own travel request or expense reports.***

## Expense Settings

- Information, Delegates, Preferences, Approvers, and Favorite Attendees are shared between **Request** and **Expense Settings**.
- Information that was entered (or edited) in **Request Settings** will carry through to the **Expense Settings**.
- If you are a delegate for others you can update/maintain that listing within your profile by selecting profile settings, then choosing **expense delegates** hyperlink, then select **Delegate for** tab and select those users that you want to delete and no longer have delegate permissions for.



The screenshot shows the SAP Concur interface. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The left sidebar has 'Profile', 'Personal Information', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Expense Delegates'. It features a 'Delegate For' tab (highlighted with a red box) and a 'Delete' button. Below this, a table lists delegates with columns: Name, Can Prepare, Can View Receipts, Can Use Reporting, Receives Emails, Can Approve, and Can Approve Temporary. The table is currently empty, showing 'No records found.' (highlighted with a red box).

## Personal Car - *Required*

Use the **Personal Car Registration** screen to enter information about your personal car. *Registering a car is required in order to be reimbursed for vehicle mileage.*

### Vehicle Types

1. **Personal Car** – for mileage reimbursed at the standard federal mileage rate.
2. **Athletics** – DO NOT USE, this is for another campus where they have a specific reimbursement rate for their Athletics department.

### To register a car:

1. Click **Profile > Profile Settings > Personal Car** (in the Expense Settings section of the left-side menu). On the **Personal Car Registration** page, click **New**.
2. Enter the **Mileage Rate Type**. This can be any nickname to identify your car. You may choose to mirror the vehicle type descriptions for ease (i.e. Personal Car or Athletics).
3. Enter the **Vehicle Type** as either “Personal Car” or “Athletics” as defined above.
4. Click **Save**.



The screenshot shows the 'Personal Car Registration' form. It includes a 'New' button (highlighted with a red box) and a 'Remove' button. The form has fields for 'Mileage Rate Type' (set to 'Personal') and 'Vehicle Type' (set to '1 Personal Car'). There is a 'Preferred Car' checkbox which is checked. At the bottom, there is a 'Save' button and a 'Cancel' button. A table at the bottom shows the registered car with columns: Mileage Rate Type, Vehicle Type, and Active. The row shows 'Personal', '1 Personal Car', and 'Yes'.

### To delete a car:

1. On the **Personal Car Registration** page, select the check box to the left of the car that you want to delete.
2. Click **Remove**.

## Other Settings

### Enabling E-Receipts - *Recommended*

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

Hotel e-receipts can be used to automatically itemize hotel expenses.

### To sign up for e-receipts:

1. Either:

A message will appear on the home screen in the Alerts section, prompting you to sign up. On the home page, **click Sign up here**, and the **E-Receipt Activation** page will appear.



OR

Click **Profile > Profile Settings > E-Receipts Activation** (in the Other Settings section of the left-side menu).



2. Click **E-Receipt Activation**. The **E-Receipt Activation and Use Agreement** appears.
3. Click **I Accept**. The e-receipts confirmation appears. Once you have accepted, if you have a Concur Travel Card it will be opted in.

### To opt-out a credit card:

1. Click **Profile > Profile Settings > Personal Information** (in the Your Information section of the left-side menu).
2. In the **Credit Cards** section, click the edit icon.
3. Clear the **Receive e-receipts for this card** check box.

## ATI/Accessibility Settings

To turn on accessibility settings and functionality you will need to update **System Settings**.

Click **Profile > Profile Settings > System Settings**. Select the Alternative UI Mode for Concur Spend box and click save.

Profile Personal Information **System Settings** Concur Mobile Registration 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
- Personal Car
- Favorite Attendees

### System Settings

#### Regional Settings and Language

Default Language: English (United States) ▼

Number Format: 1,000.00 ▼

Placement of Currency Symbol: Before the amount ▼

Negative Number Format: -100 ▼

Negative Currency Format: -100 ▼

mile/km: mile ▼

Date Format: mm/dd/yyyy ▼

Time Format: h:mm AM/PM ▼

Hour/Minute Separator: : ▼ 08/29/2019 02:09 pm

Time zone (local time): (UTC-08:00) Pacific Time (US & Canada) ▼

#### Calendar Settings

Start week on: Sunday ▼

Start Day View At: 08:00 am ▼

End Day View At: 08:00 pm ▼

Default View: month ▼

#### Other Preferences

Home Page: ▼

Rows per page: 25 ▼

#### Other Settings

☒ Alternative UI Mode for Concur Spend ⓘ

**Save** **Reset** **Cancel**