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Concur
Reference Guide
Profile Setup

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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: Flight: Use to book a flight. You can also book hotel and reserve a car at the same time. Car, Hotel, or Rail: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (Flight 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 Open Requests, Available Expenses, Open Reports and Required Approvals .

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 CSU The California State University. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'App Center', and 'Quick Task Bars' (highlighted with a red box). The user's profile is visible in the top right corner.

The main content area is divided into several sections:

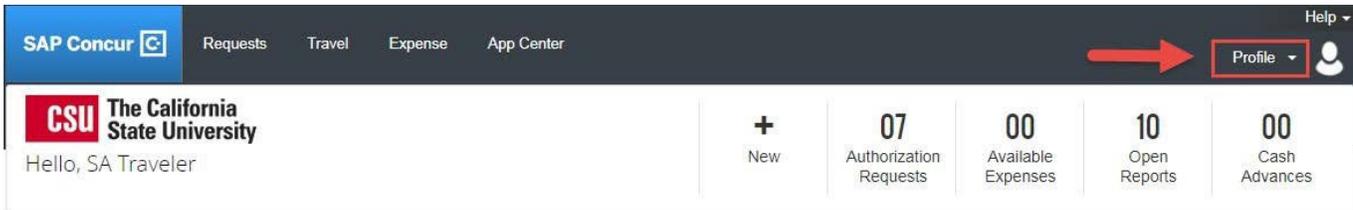
- Quick Task Bar:** Located at the top right, it contains five cards: 'New', '07 Authorization Requests', '00 Available Expenses', '10 Open Reports', and '00 Cash Advances'.
- TRIP SEARCH:** A section on the left with a search form for 'Mixed Flight/Train Search'. It includes fields for 'From' and 'To' and a 'Search' button.
- ALERTS:** A section at the top right of the main content area, containing a notification about a free TripIt Pro subscription.
- COMPANY NOTES:** A section below alerts, containing a link to 'Concur Training Toolkit'.
- MY TASKS:** A section at the bottom right, containing three cards: '07 Open Requests', '00 Available Expenses', and '10 Open Reports'. Each card lists recent items with dates and amounts.
- MY TRIPS (0):** A section on the left below the search form, showing 'You currently have no upcoming trips.'

Concur Travel Profile

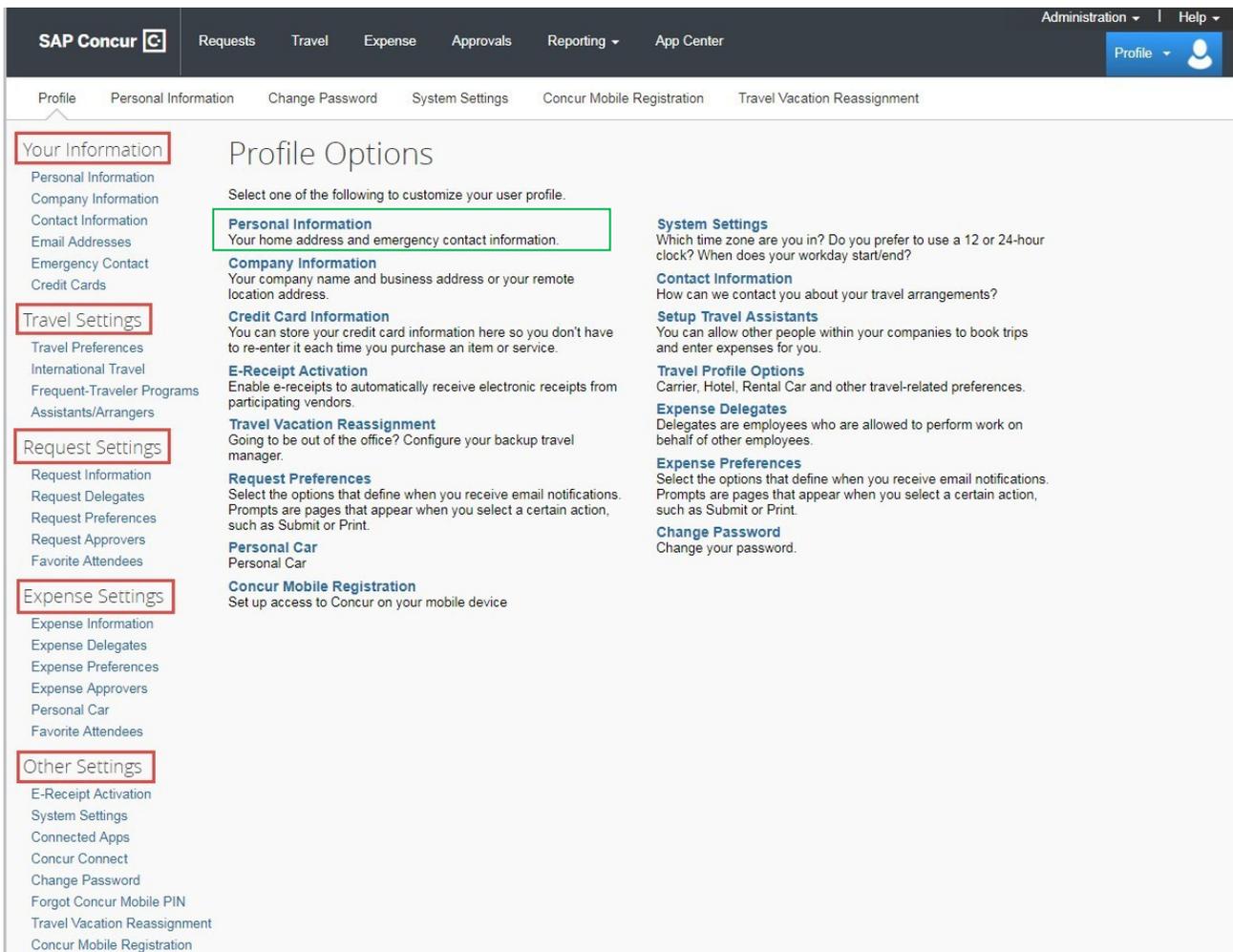
Updating Your Profile

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 [Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone [Required**]	<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.

- ▶ [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](#)

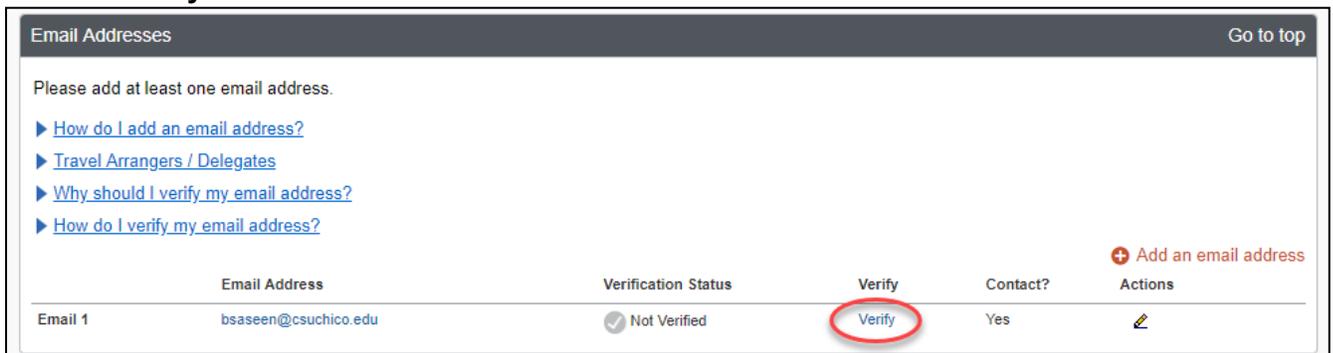
	Email Address	Verify	Contact?	Actions
Email 1	satraveler@csus.edu	<input type="checkbox"/> Not Verified	<input type="checkbox"/> Verify	Yes ✎
Email 3	sacstatetravel@csus.edu	<input checked="" type="checkbox"/> Verified	<input type="checkbox"/> Disable Verification	Yes ✎ 🗑

Verify your email address! *Important!*

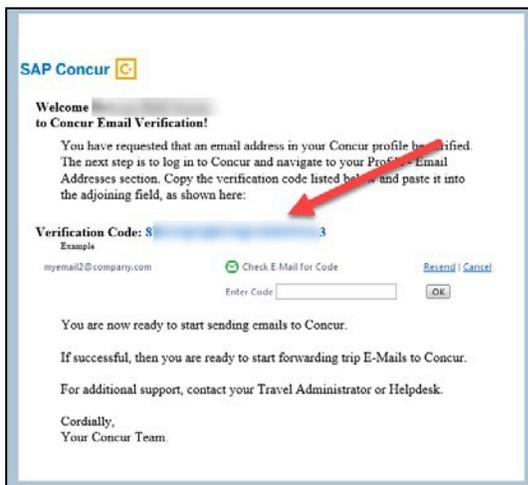
- Your @csuchico.edu email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the **Verify** link. By verifying your email address, Concur can associate your email address with your Concur account.
- Once you verify your email address, you will be able to forward any electronic receipts to receipts@concur.com. 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.
- 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.



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



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 OK

8: TN

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.

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No.

Male Female 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**.

International Travel: Passports and Visas Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports + Add a Passport

I do not have a passport

Add a Passport

Passport Date of Birth (mm/dd/yyyy)
 Passport Nationality
 Passport Number
 Passport Date Issued (mm/dd/yyyy)

Passport Expiration (mm/dd/yyyy)
 Passport Place Issued (City, State)
 Passport Place Issued (Country)

International Visas + Add a Visa

Add a Visa

Visa Nationality
 Visa Type
 Visa Number
 Visa Expiration (mm/dd/yyyy)

[Save](#)

Assistants & Travel Arrangers – *Recommended*

1. Click **Add an Assistant**
2. Enter assistant last name and select the person when they come up on the list of available choices.
3. Click **Can book travel for me** and Is my primary assistant for travel, if applicable.
4. Click **Save**. Repeat for additional arrangers if applicable. Make sure they have a green check mark by their name before finishing up with this section.

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

Name	Can book travel?	
	Can book travel? <input checked="" type="checkbox"/>	✎ 🗑️
	Can book travel? <input checked="" type="checkbox"/>	✎ 🗑️

Credit Cards – *Required to Book Travel in Concur*

- CSU, Chico recommends the use of the university-paid travel card if the traveler meets cardholder eligibility.
- Your University-paid Travel Card will be loaded into your profile automatically.

If a traveler is eligible for the corporate travel credit card that will be the only card added to this section. A personal credit card would only be added if not eligible for the corporate travel credit card.

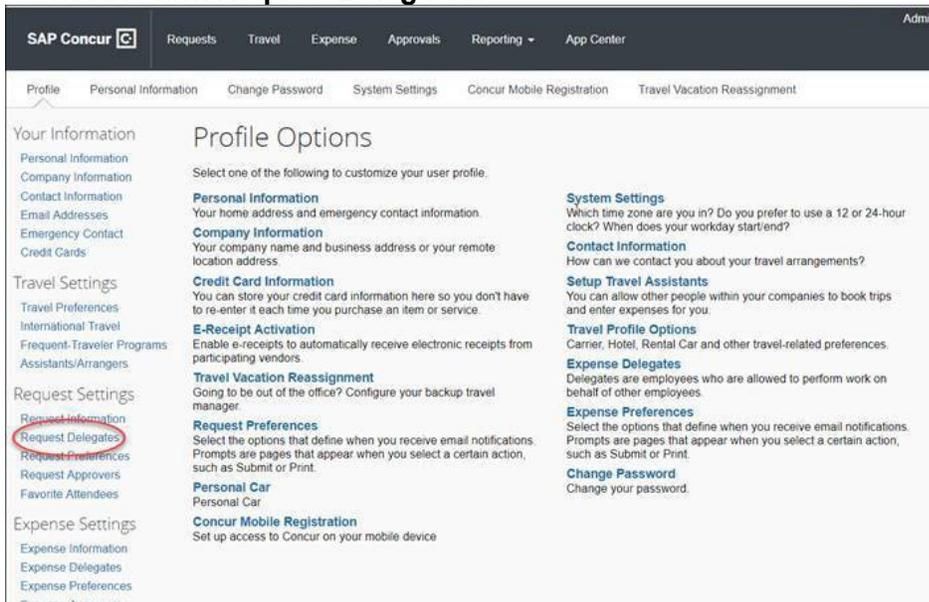
Request Settings

Request Delegates - *Important!*

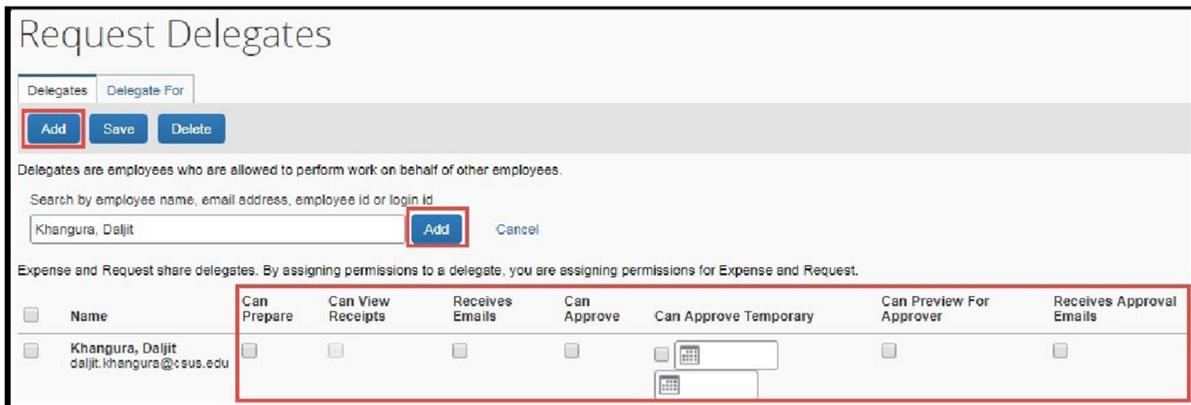
- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare travel requests and expense reports on behalf of a traveler, but they cannot **submit**. The traveler must submit for approval and further processing. This step acts as an electronic signature on the transaction.

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**.



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)



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	DO NOT USE , 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.

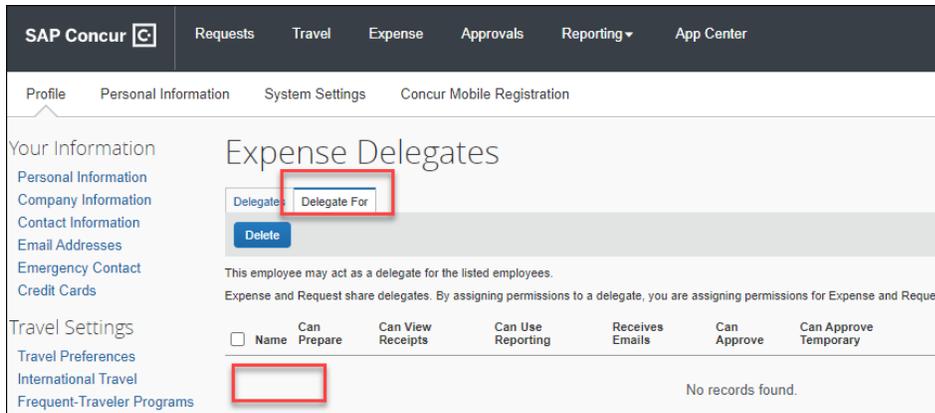
A traveler can set up a delegate to enter Travel Requests and Expense reports. Once the Request or Report is built, the Delegate can use the "Notify Employee" button to let the traveler know the Request or Report is ready to submit.



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 user interface. At the top, there are navigation tabs: Requests, Travel, Expense, Approvals, Reporting, and App Center. Below this, there are sub-tabs: Profile, Personal Information, System Settings, and Concur Mobile Registration. The main content area is titled "Expense Delegates". On the left, there is a sidebar menu with "Your Information" (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards) and "Travel Settings" (Travel Preferences, International Travel, Frequent-Traveler Programs). The main area has a "Delegate For" tab selected, with a "Delete" button below it. A text box explains: "This employee may act as a delegate for the listed employees. 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: 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." There are red boxes highlighting the "Delegate For" tab and the "Delete" button.

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" screen. At the top, it says "This page displays all the personal cars that have been registered. Click New to register another car." Below this, there are two buttons: "New" and "Remove". The "New" button is highlighted with a red box. Below the buttons, there are two input fields: "Mileage Rate Type" with the value "Personal" and "Vehicle Type" with the value "1 Personal Car". There is a checkbox for "Preferred Car" which is checked. At the bottom, there are "Save" and "Cancel" buttons. Below the form, there is a table with columns: Mileage Rate Type, Vehicle Type, and Active. The table has one row with the values "Personal", "1 Personal Car", and "Yes". There are red boxes highlighting the "New" button and the "Personal" value in the "Mileage Rate Type" field.

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 ⓘ

Email Notifications

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails ⓘ
- Send Trip-on-Hold Reminder Emails ⓘ
- Send Ticketed Travel Reminder Email ⓘ
- Send Cancellation Emails ⓘ

Save Reset Cancel