



Otter Travel Desk  
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Concur User Guide  
Profile Setup

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**January 02, 2025**

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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.

\*Rental cars may only be booked in Concur if the traveler has a Concur Travel Credit Card or if they pay using their own credit card and are later reimbursed.

The screenshot displays the SAP Concur home page for a user at The California State University (CSU). The top navigation bar includes the SAP Concur logo and menu items: Requests, Travel, Expense, App Center, and Quick Task Bars. The user's profile is visible in the top right corner.

The main content area is divided into several sections:

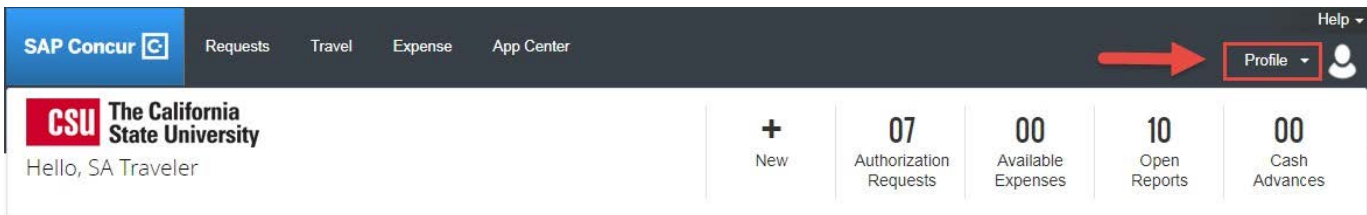
- Quick Task Bars:** A row of five cards showing counts: New (07), Authorization Requests (07), Available Expenses (00), Open Reports (10), and Cash Advances (00).
- TRIP SEARCH:** A section for booking trips, including a search form with fields for departure and arrival cities, and a search button.
- ALERTS:** A section containing an informational alert: "As a CSU Office of the Chancellor employee, you are eligible for a free Tript Pro subscription. [Learn More and Activate](#) Not right now".
- COMPANY NOTES:** A section with a note about the Concur Training Toolkit and a link to utilize the Concur Expense System.
- MY TASKS:** A section with three columns:
  - Open Requests (07):** A list of travel requests with dates and amounts:
    - 07/26 Texas state \$1,830.00 — Travel
    - 07/23 New York, NY 7/23-7/26/18 \$600.00 — Travel
    - 07/16 Hawaii Test \$1,464.00 — Travel
    - 07/09 Alaska test \$1,000.00 — Travel
    - 06/24 Receipt Testing domestic \$1,330.00 — Travel
  - Available Expenses (00):** A card with a checkmark icon and the message: "You currently have no available expenses."
  - Open Reports (10):** A list of returned reports:
    - 07/20 test \$300.00 Returned
    - 07/06 Hawaii incidental \$260.00 Returned
    - 07/06 Hawaii incidental \$72.00
    - 07/05 Hawaii Test \$600.00 Returned
    - 07/05 Alaska test \$557.00

# Concur Travel Profile

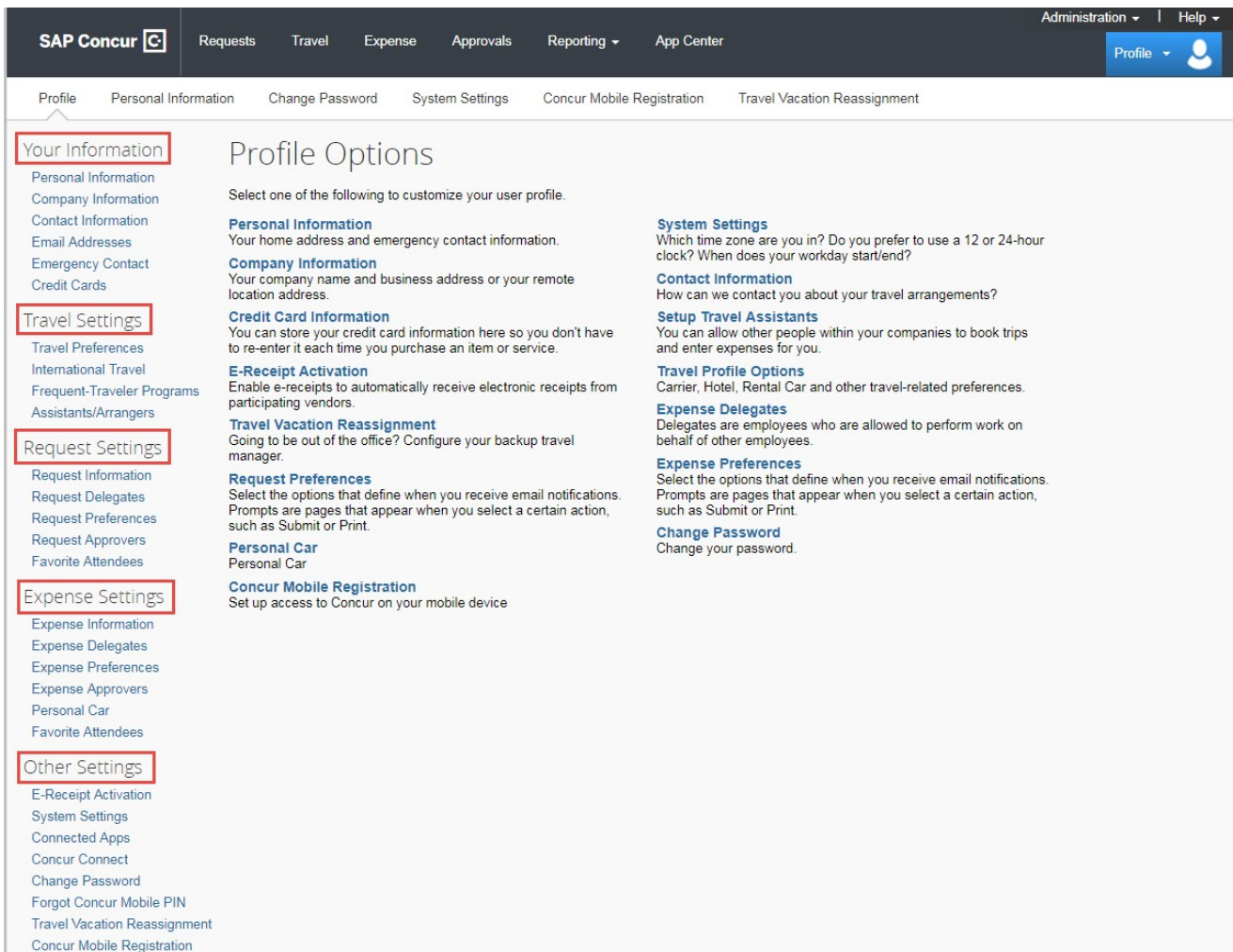
## Updating Your Profile

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**. Begin setting up your profile with **Your Information**.



## 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**

- 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, or work and cell; these can be cell or land lines.
- **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
916-278-6477			
Home Phone <b>[Required**]</b>			
Pager	Other Phone		
Mobile Phone Country	Mobile Phone		
United States of America (+1)	916-258-3562		

### 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](#)

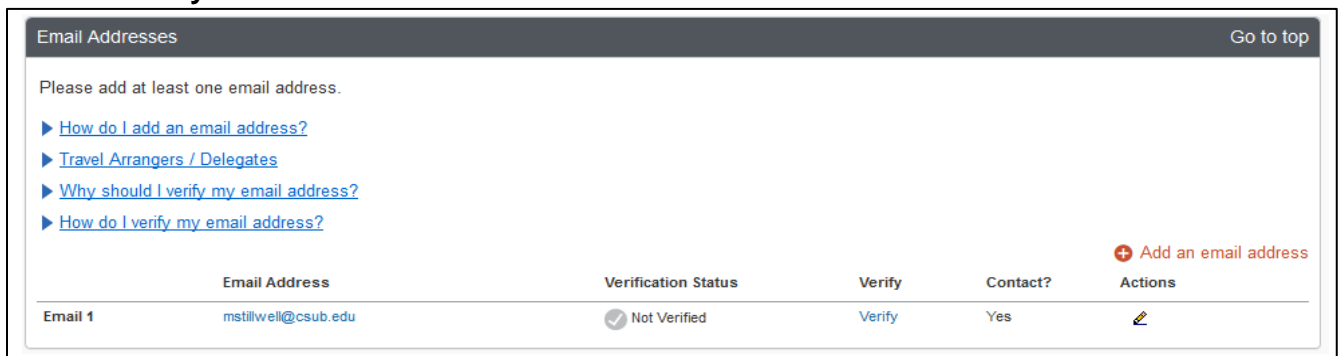
	Email Address	Verify	Contact?	Actions
Email 1	satraveler@csus.edu	Not Verified	Yes	
Email 3	sacstatetravel@csus.edu	Verified	Yes	

## Verify your email address! *Important!*

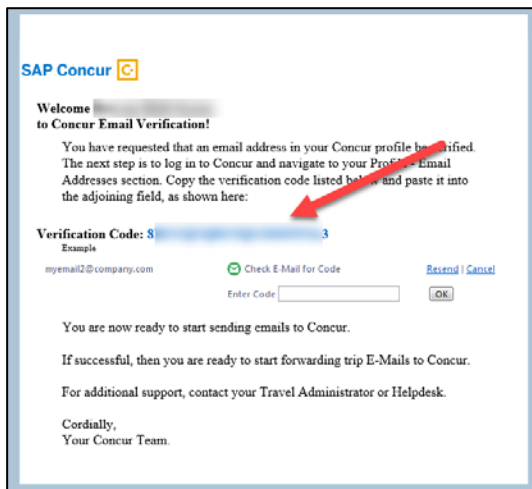
- Your @csu---.edu email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the **Verify** link. By verifying your email address, Concur can associate your email address with your Concur account.
- Once you 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.



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.

6. Click **OK**.

**Emergency Contact** – *Optional* however, when traveling, if there should be an emergency, 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**

**TSA Secure Flight -**

If you have a DHS Redress, TSA Pre-check, or Global Entry number, enter here. (Global Entry should be entered in the TSA Pre-check field.)

**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
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

### Credit Cards – *Required to Book Travel in Concur*

- CSUB recommends the use of the university-paid Concur Travel Credit Card if the traveler meets cardholder eligibility (2 business trips or more per year). [https://www.csub.edu/bas/paymentservices/\\_files/us\\_bank\\_concur\\_travel\\_card\\_app.pdf](https://www.csub.edu/bas/paymentservices/_files/us_bank_concur_travel_card_app.pdf)
- The Concur Travel Credit 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.*

- Airfare and rail travel booked in Concur will be paid by CSUB. All other travel booked in Concur must be paid by either the Concur Travel Credit Card or a personal credit card.

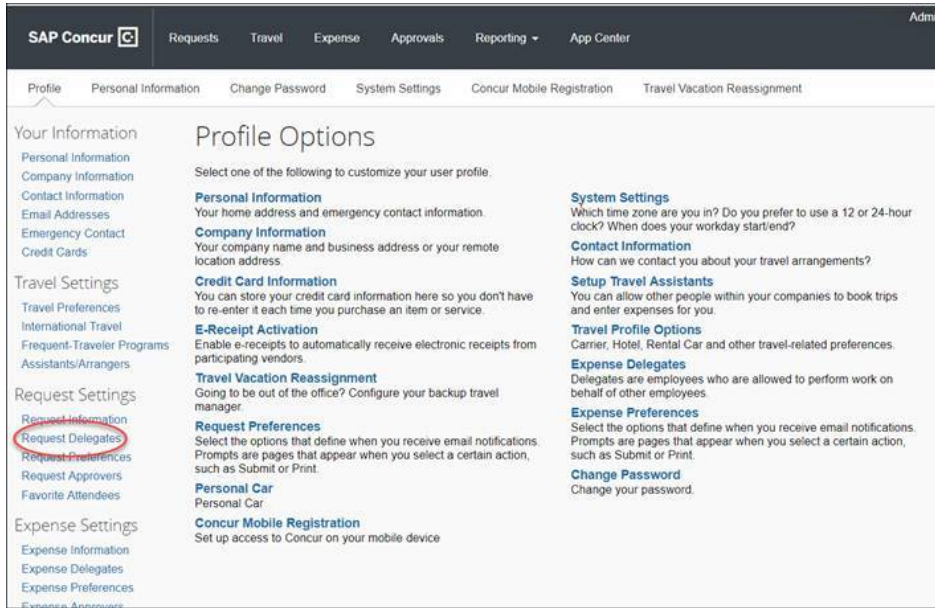
### Request Settings

#### Request Delegates - *Important!*

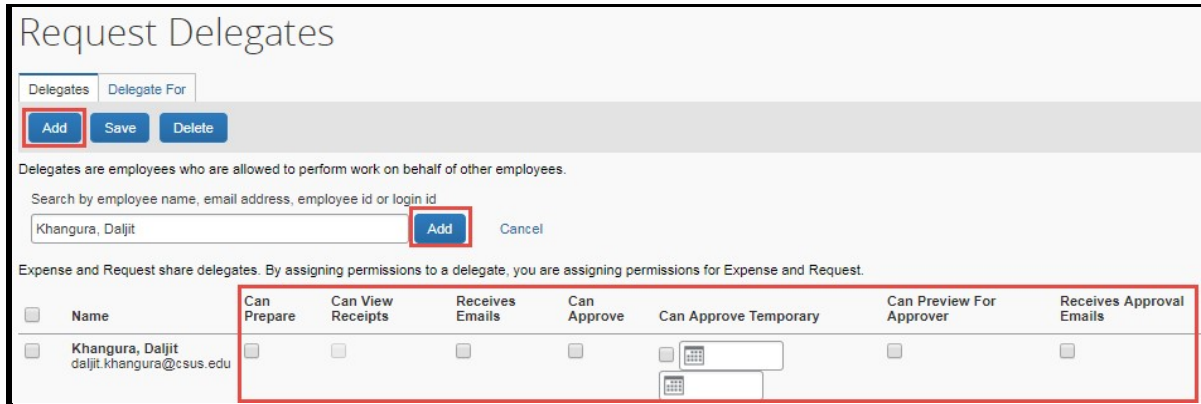
- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare and submit travel requests, book travel, and prepare, but **not** submit, an expense report on behalf of the traveler.

#### 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 Expense related email that you receive, except for approval emails.
Can Preview for Approver	If selected, the delegate can preview requests and expense reports on behalf of another employee. This delegate cannot approve the request/expense report.
Receives Approval Emails	If selected, the delegate receives a copy of each Expense approval-related email that you receive.
(*) Can Approve	If selected, the delegate can approve expense reports, and requests on your behalf, without date constraints.
(*) 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.

(\*) *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.***

### Request Preferences - *Optional*

On the **Request Preferences** screen, you can select the options that define when you receive the following:

- Email notifications
- Prompts

### **Request Approvers**

A default approver will automatically display. Contact Accounts Payable for questions about this setting.

### **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**.

### **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** – for mileage reimbursed at the current mileage rate for the Athletics department (this is campus specific and may be N/A for some campuses who have not defined a different mileage rate for Athletics).

### **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 **Vehicle ID**. This can be any nickname to identify your car, perhaps something simple like "personal vehicle".
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. At the top, it says 'This page displays all the personal cars that have been registered. Click New to register another car.' Below this, the 'Reimbursement Method' is set to 'Personal Car - Variable Rates'. There are 'New' and 'Remove' buttons. The 'Vehicle ID' field contains 'RAV4'. The 'Mileage Rate Type' dropdown menu is open, showing options '1 - Personal Car' (selected), '1 - Personal Car', and '2 - Athletics'. There is a 'Preferred Car' checkbox which is checked. At the bottom, there are 'Save' and 'Cancel' buttons. Below the form is a table with columns for 'Vehicle ID', 'Mileage Rate Type', and 'Active'. The table contains one row with 'RAV4', '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**.

This screenshot is similar to the previous one, but the 'Remove' button is highlighted with a red box. The 'Mileage Rate Type' field is now set to 'Personal' and the 'Vehicle Type' dropdown is set to '1 Personal Car'. The 'Preferred Car' checkbox is still checked. The table at the bottom has a red checkmark in the 'Vehicle ID' column for the 'Personal' row.

## 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.

