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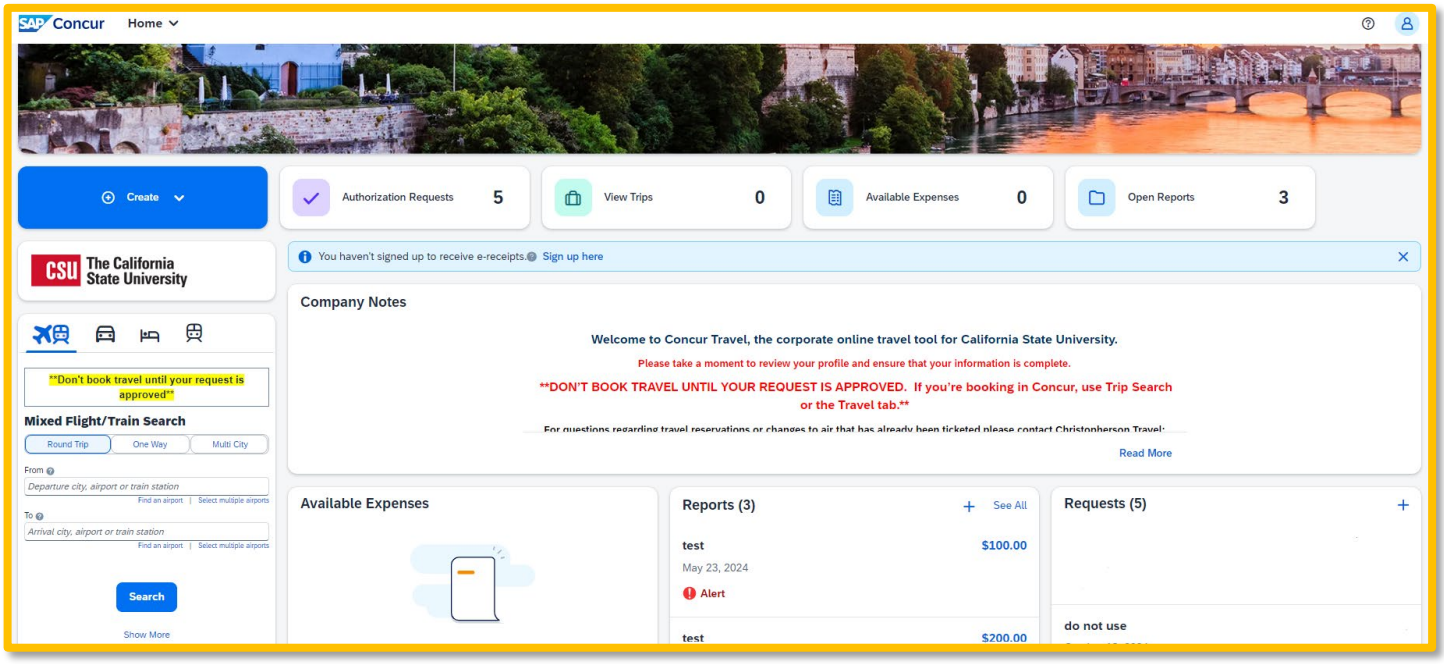
Navigating Concur

Exploring the home page, also known as the Concur dashboard. To return to the home page from any other page, click the SAP Concur logo on the top left corner of the screen.

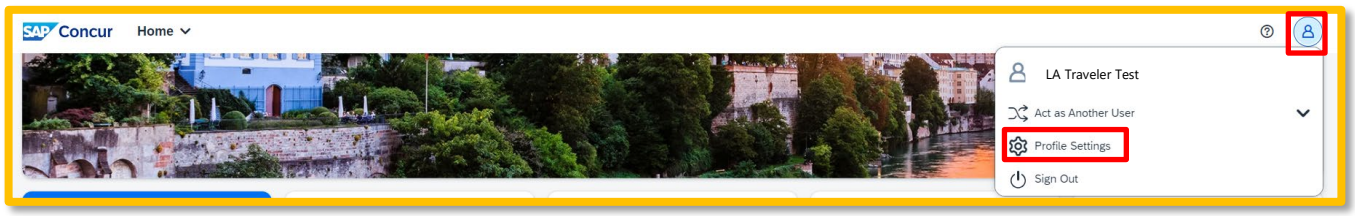
Section	Description
Quick Task Bar	Provides direct access to create or approve travel requests and expense reports, apply available electronic expenses to an expense report, access incomplete travel requests and expense reports, and view trips.
Profile	Provides access to verify personal information for 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.
Alerts	This section displays informational alerts about Travel features.
Company Notes	Displays University-specific information.
My Tasks	This section lists Open Requests, Available Expenses, Open Reports and Required Approvals.



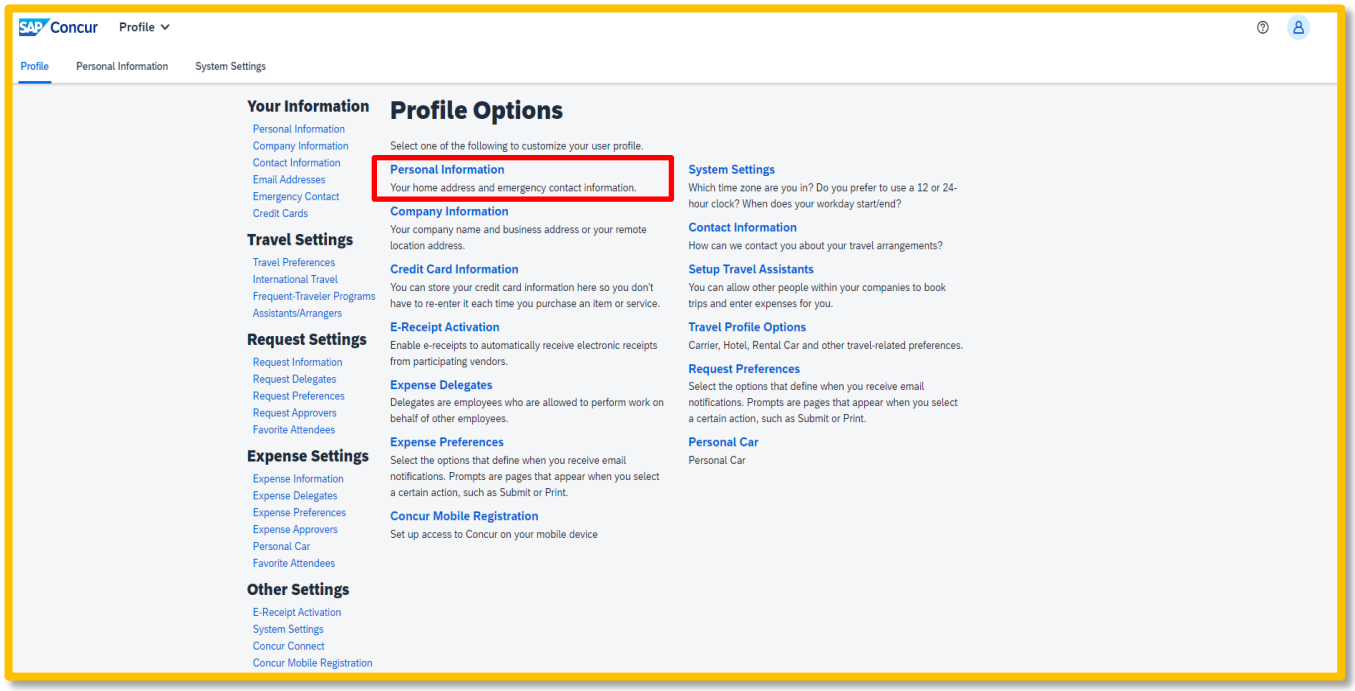
Personal Information

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. Select **Personal Information** link.

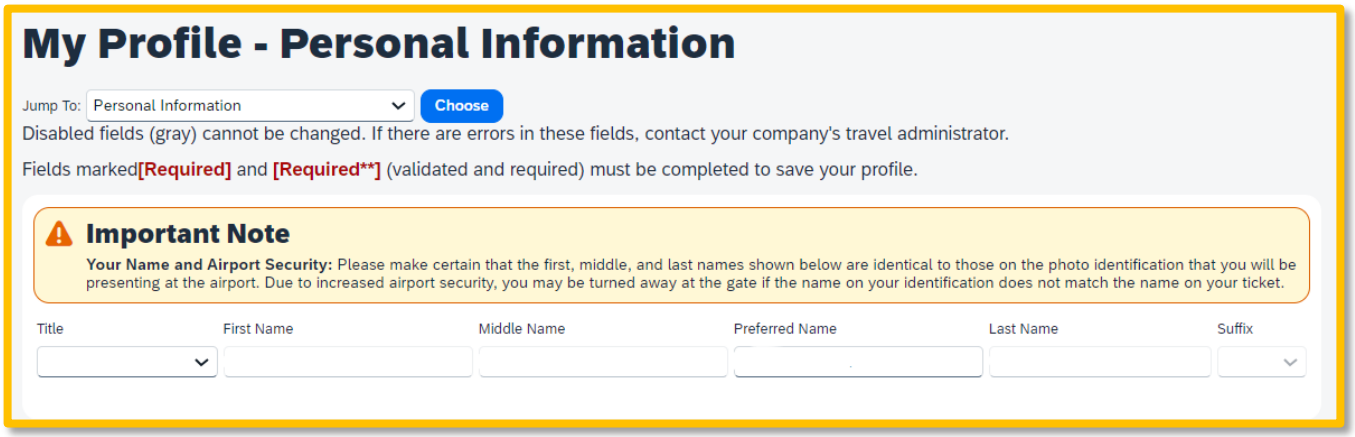


3. Review and fill out the following fields to complete profile setup with your personal information.

Name

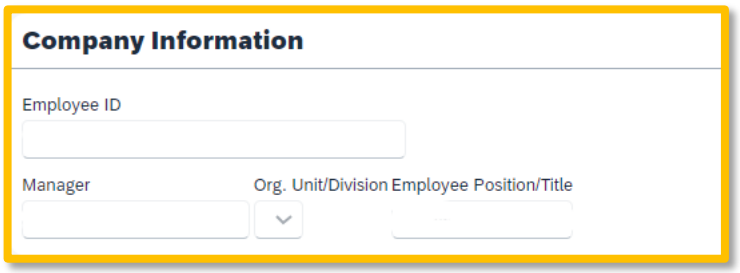
First, **Middle, Last Name** will be automatically populated from your HRM record. If applicable, include **Suffix** to match your government-issued ID.

NOTE: The complete name should match your government-issued photo ID (excluding Preferred Name), such as a driver's license or passport, which you will present to airport security. If first/last name are incorrect, please contact Human Resources Management to update your record.



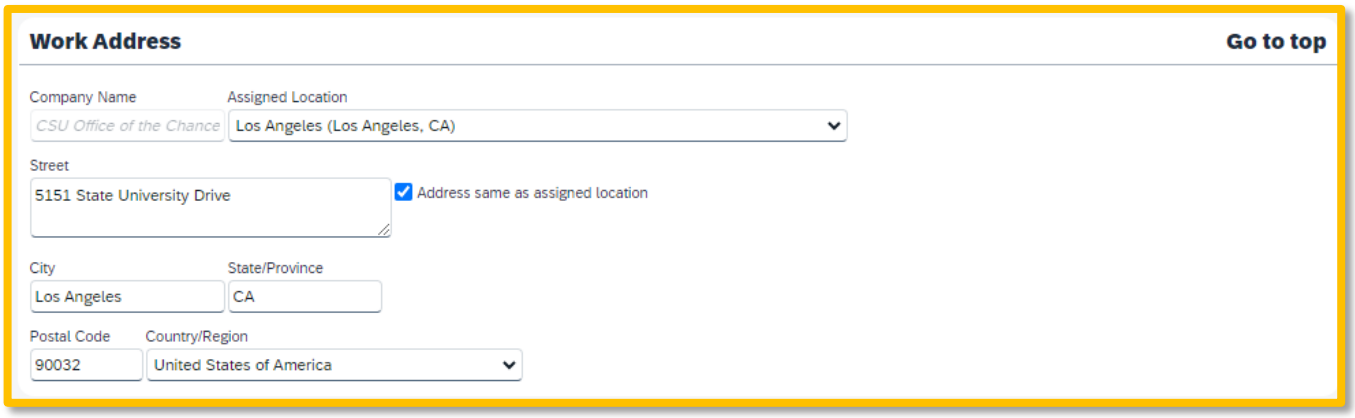
Company Information

Automatically populates.



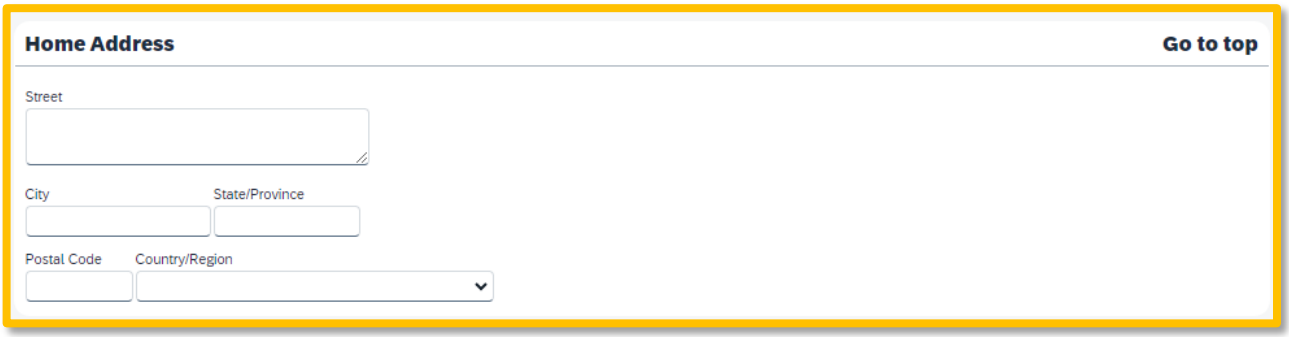
Work Address

1. Choose your work address under the **Assigned Location** dropdown.
2. Check box next to **Address same as assigned location** and the address will auto-populate.



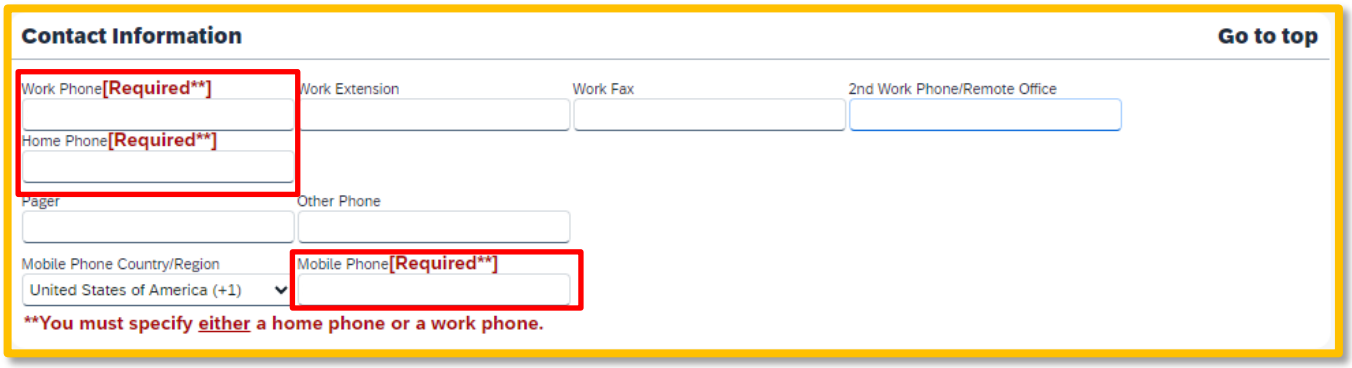
Home Address

Optional, but recommended.



Contact Information

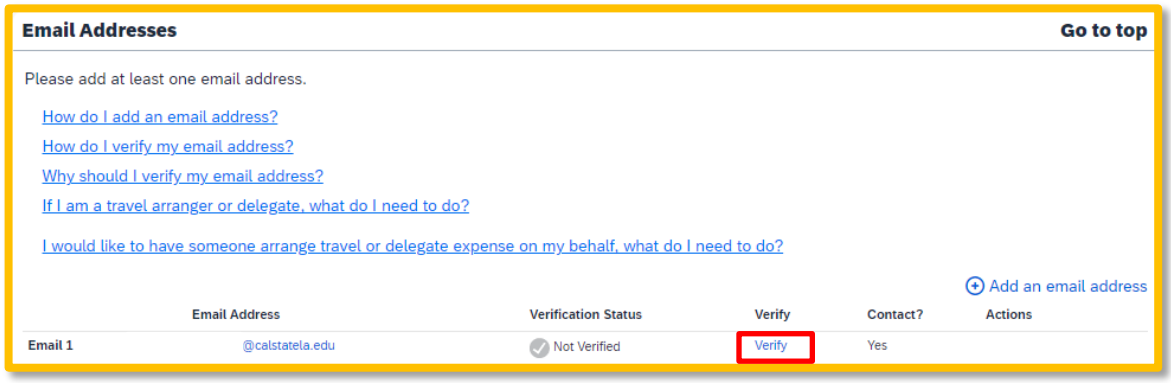
1. Enter either a **work** or **home phone** number. Your work extension will be automatically populated. Please update as necessary.
2. **It is *highly recommended* to enter your mobile phone number**. A mobile device will allow you to **receive text messages from Concur** informing you of any cancelled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



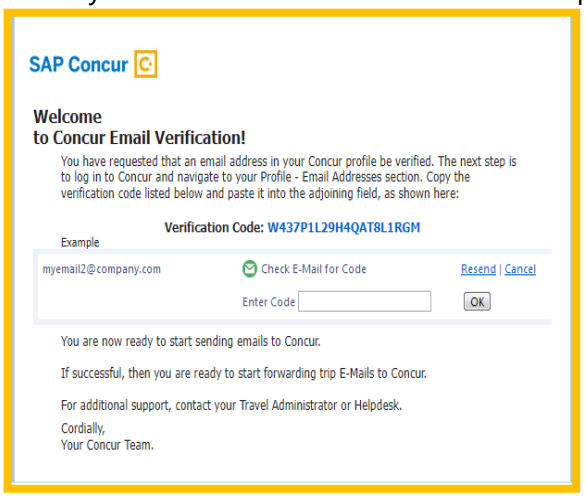
Email Addresses

Your @calstatela.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.

1. Verify your email address by clicking the **Verify** link.



2. Check your email for a verification code to copy into the **Enter Code** box on your Concur profile.

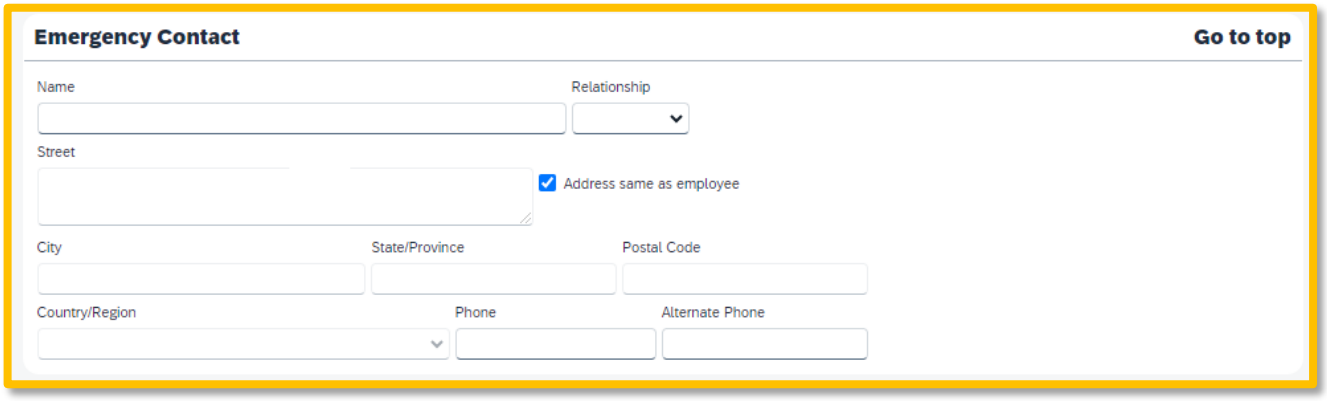


NOTE: Once you verify your email address, you will be able to forward any electronic receipts to receipts@concur.com. They will then be displayed in the **Available Receipts** in the Expense portion of the application. It also enables itinerary information to be emailed to plans@concur.com.

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**.

Emergency Contact

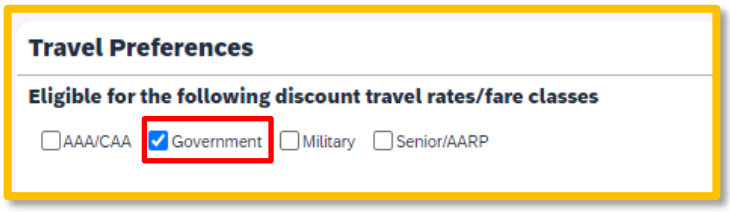
Optional. When traveling, if there should be an emergency, our travel agent, Christopherson Business Travel, will have access to the **Emergency Contact** information.



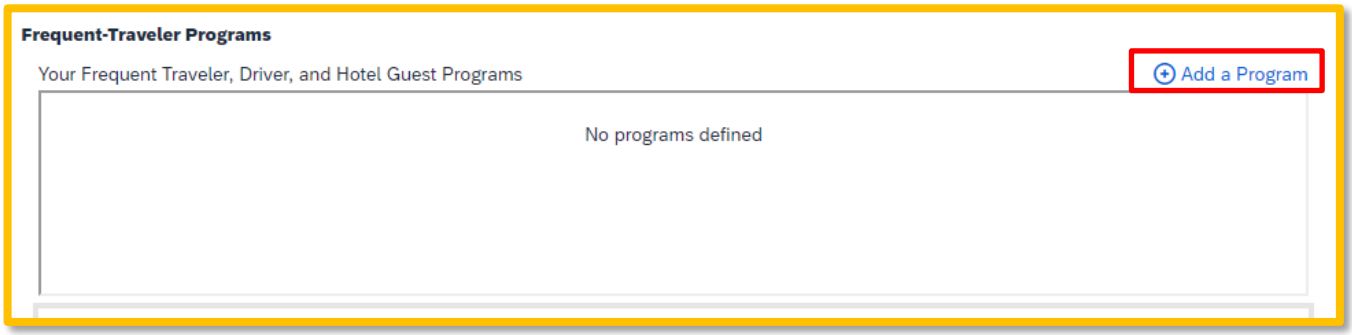
Travel Preferences

Optional, but recommended for frequent travelers.

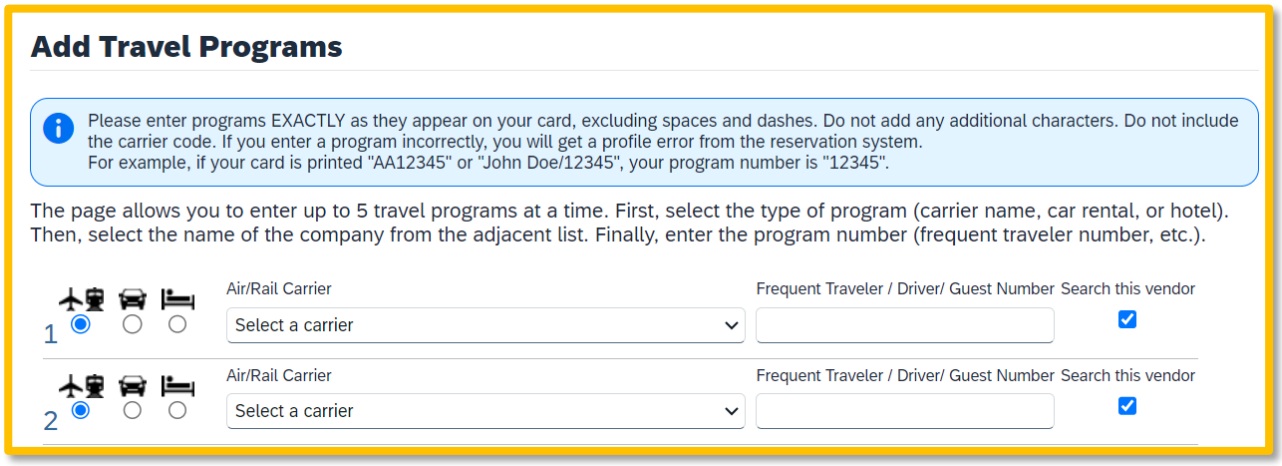
1. Mark the **Government** checkbox to be eligible for discount travel rates/fare classes.



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

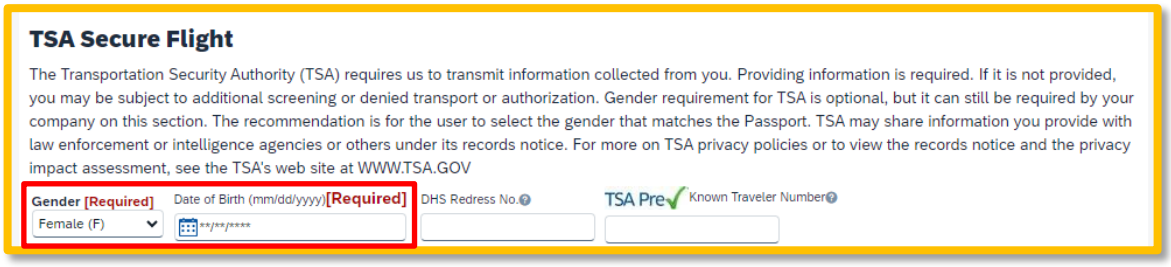


   a. Enter air, car rental, and hotel Frequent Traveler program information. Click **Save** and then "**I Agree**" to the terms and conditions.



Gender and Date of Birth

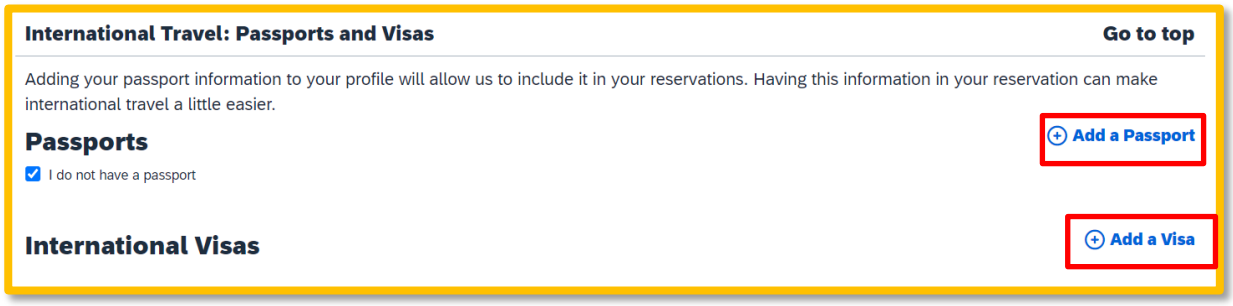
1. Select your Gender and input your Date of Birth.
2. If you have a **TSA Pre-check number**, it can be entered.



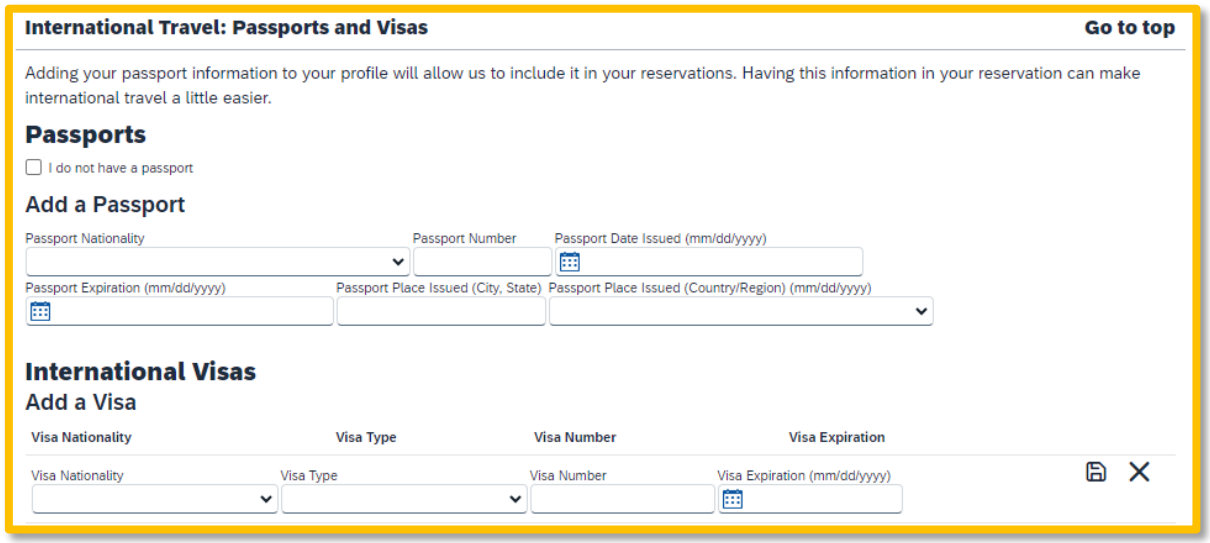
International Travel: Passports and Visas

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**.

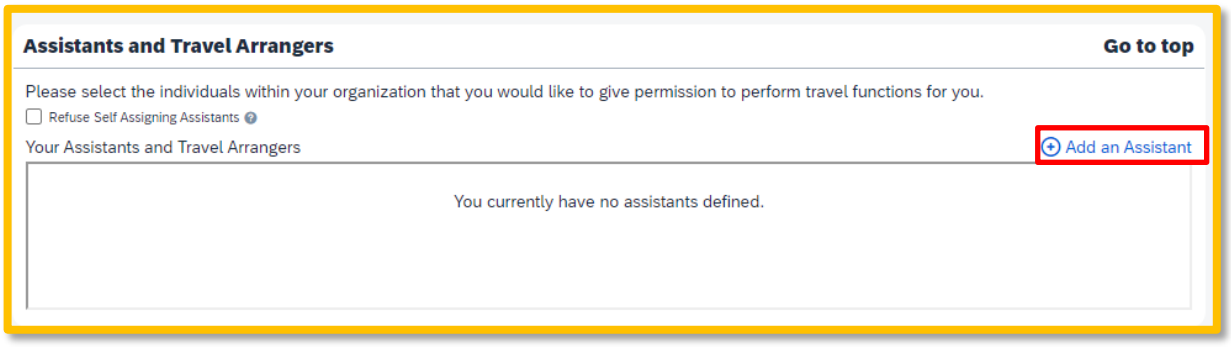


2. Enter Passport or International Visa Information, then click **Save**.



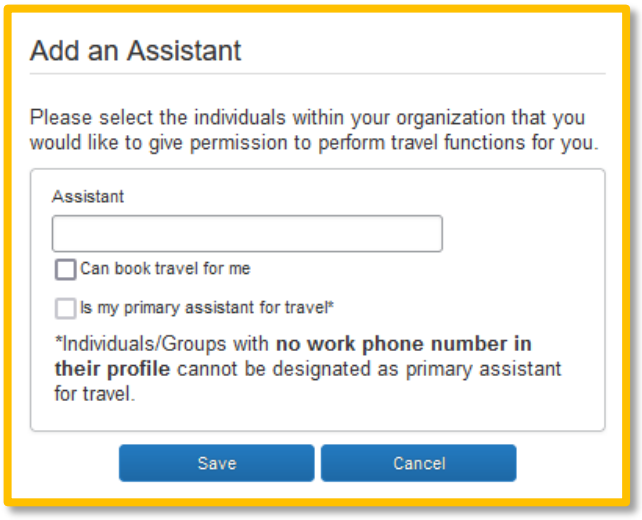
Assistants & Travel Arrangers

1. Click **Add an Assistant**.



2. A pop-up window will appear. Input their last name in the **Assistant** search field and select the user from the drop-down list.

3. Click **Can book travel for me** and **Is my primary assistant for travel**, if applicable.

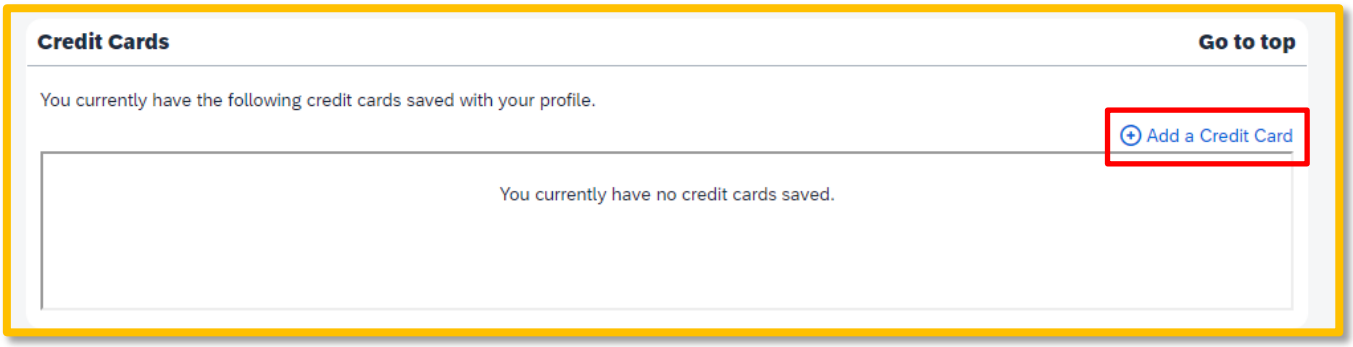


4. Click **Save**. Repeat for additional arrangers if applicable. Make sure they have a green check mark by their name before finishing up with this section.

Credit Cards

Required if booking travel in Concur.

1. Click **Add a Credit Card**.



2. Follow the instructions on screen and then click **Save**.

Delegates

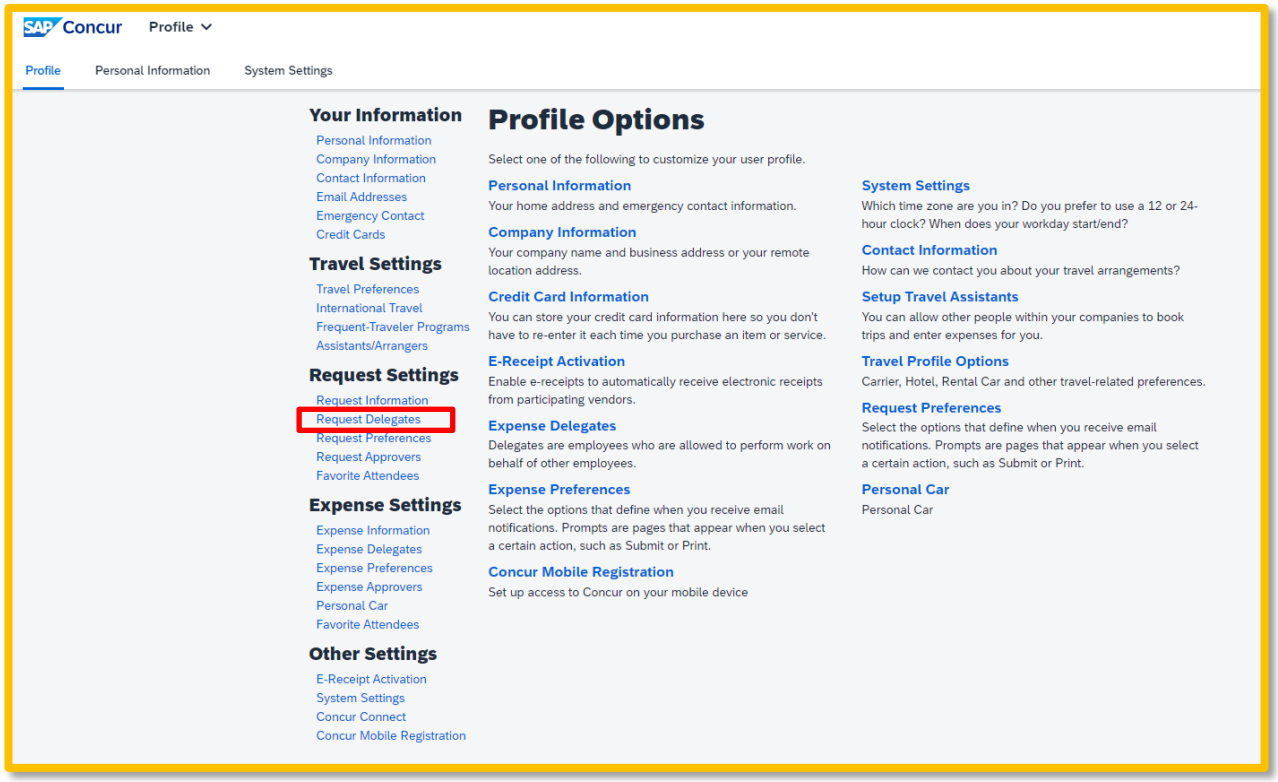
Delegates are employees who are allowed to perform work on behalf of other employees.

Delegates can prepare travel requests and expense reports on behalf of a traveler, but they cannot submit. Instead, 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 requests and expense reports for approval and further processing. This step acts as an electronic signature on the transaction.

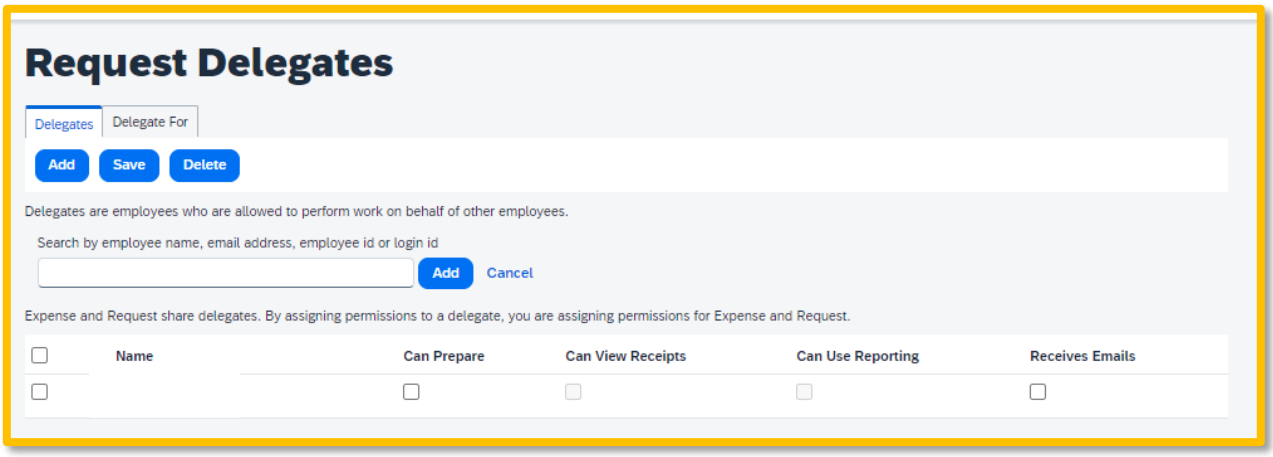
Adding a Delegate

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



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, then click **Add.**



4. Check the boxes that correspond with the permissions you are granting to the delegate then click **Save**. (*Recommended permissions for Delegates).

Option	**Description**
*Can Prepare	If selected, the delegate can create expense reports and requests on your behalf. This permission should be granted if delegating a preparer.
*Can View Receipts	If selected, the delegate can view receipt images on your behalf. This permission should be granted if delegating a preparer.
Can Use Reporting	If selected, the delegate can run reports on your behalf. Please note: You must have Reporting access already in order to delegate to another employee. You can delegate up to two employees with this Reporting permission.
*Receives Emails	If selected, the delegate receives a copy of each email that you receive, as a traveler. Approval emails not included. This permission should be granted if delegating a preparer.
Can Preview for Approver	If selected, the delegate can preview Travel Requests and Expense Reports that are pending your approval on your behalf. A previewer does not have to have an approver role in Concur and will not have the ability to approve.
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 Travel Requests and Expense Reports on your behalf only during a specific period of time. By selecting this option, you will select a 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 (e.g. Dean unavailable and approvals would be routed to Associate Dean).*

Maintaining Delegate Listing

1. If you are a delegate for others, you can update/maintain that listing within your profile by selecting the **Delegate For** tab.
2. Select the users that you want to delete and no longer have delegate permissions for.

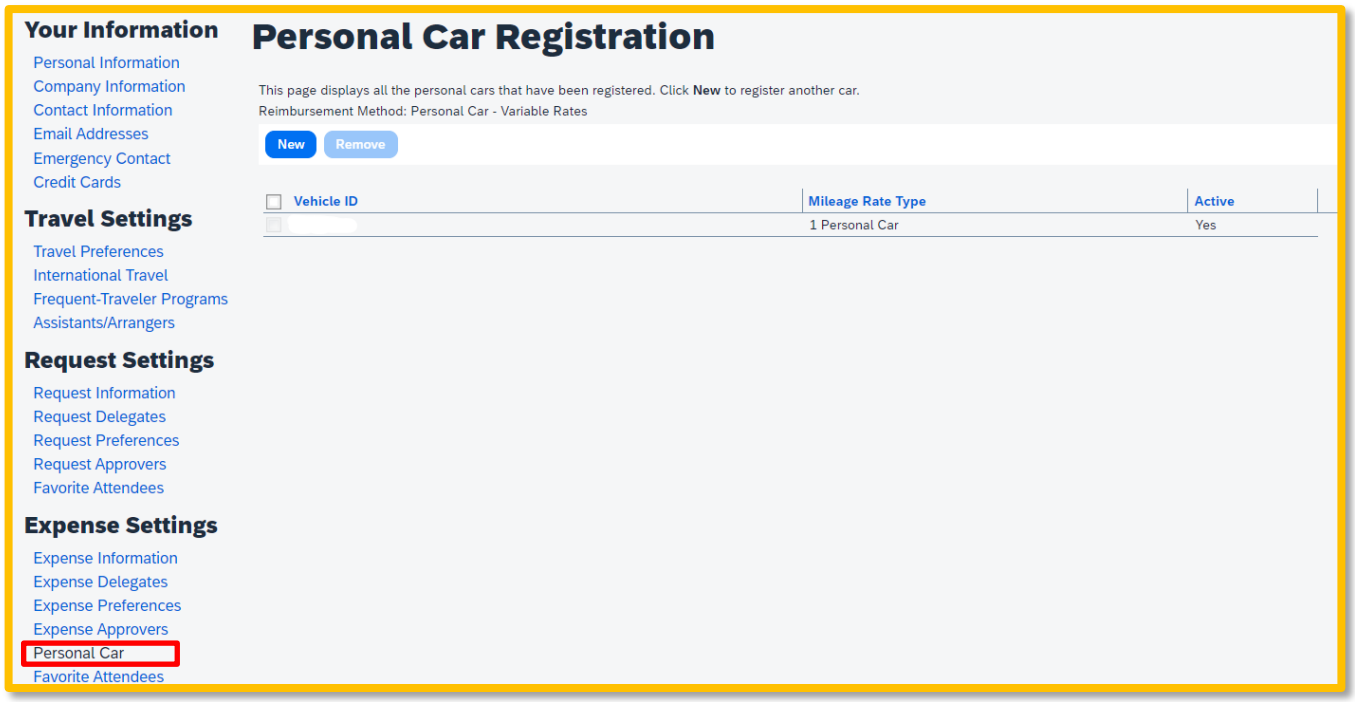
NOTE: Information that was entered or edited in **Request Settings** will carry through to the **Expense Settings**.

Personal Car

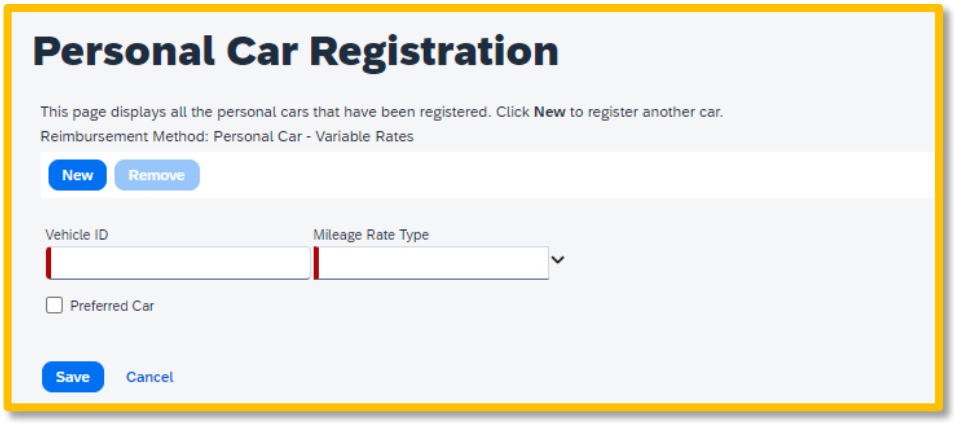
Use the **Personal Car Registration** screen to enter information about your personal car. ***Registering a car is required in order to be reimbursed for vehicle mileage.***

To add a personal car:

1. Click **Personal Car** under the Expense Settings section of the left-side navigation.
2. On the **Personal Car Registration** page, click **New**.



3. Enter your license plate number for the **Vehicle ID**.
4. Enter the **Mileage Rate Type** as **1 Personal Car** for mileage reimbursed at the standard federal mileage rate.



5. Click **Save**.

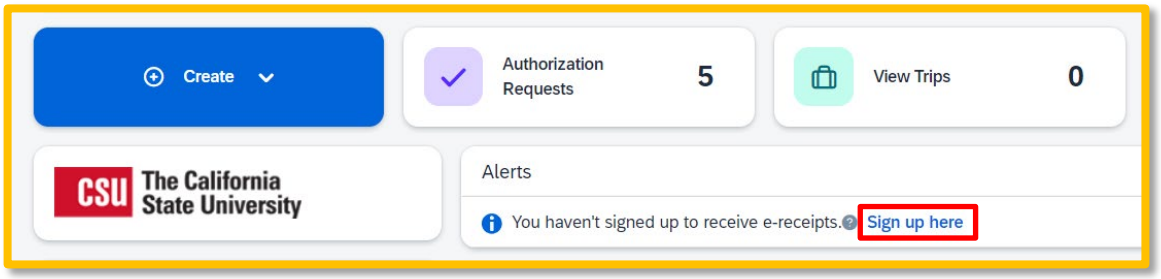
E-Receipts

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:

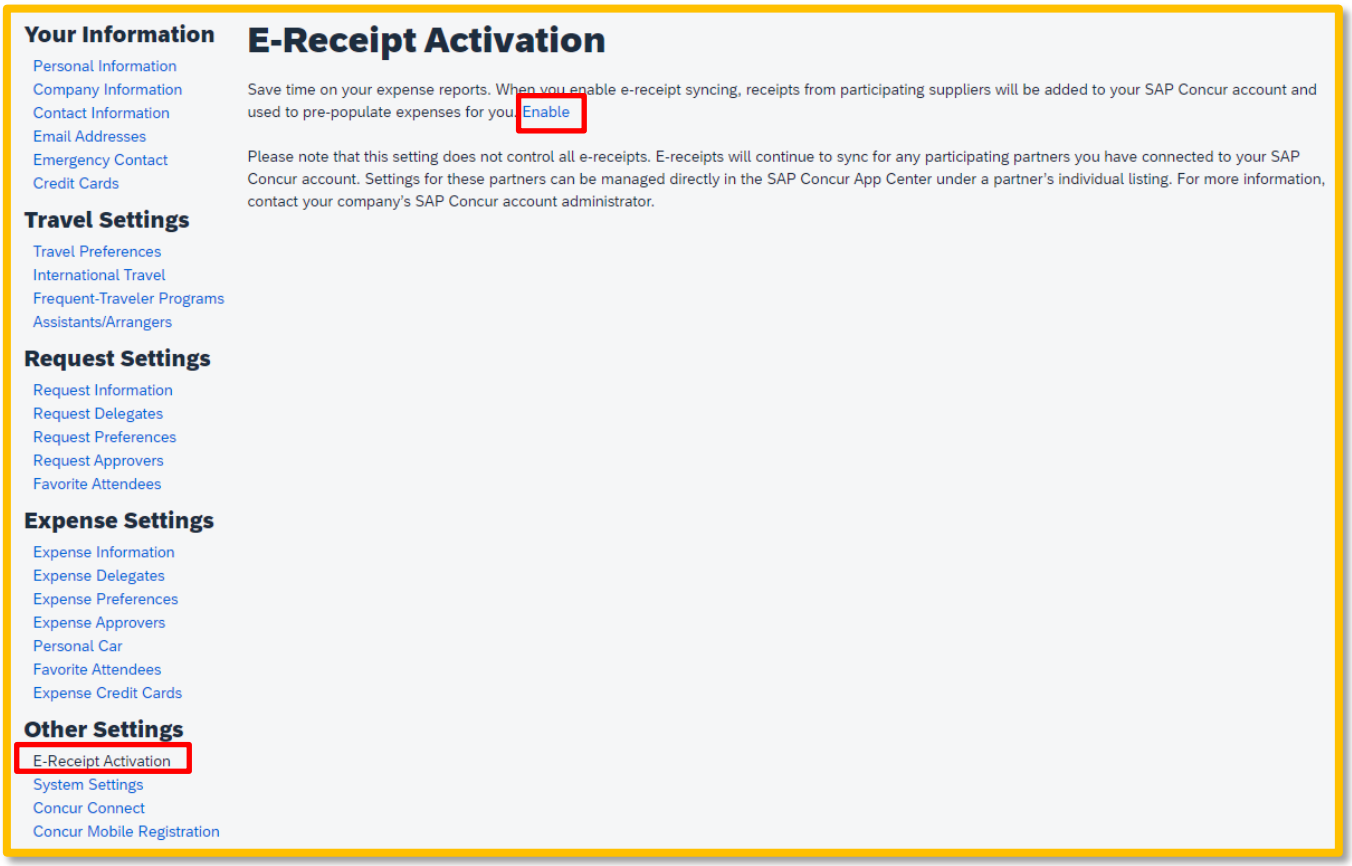
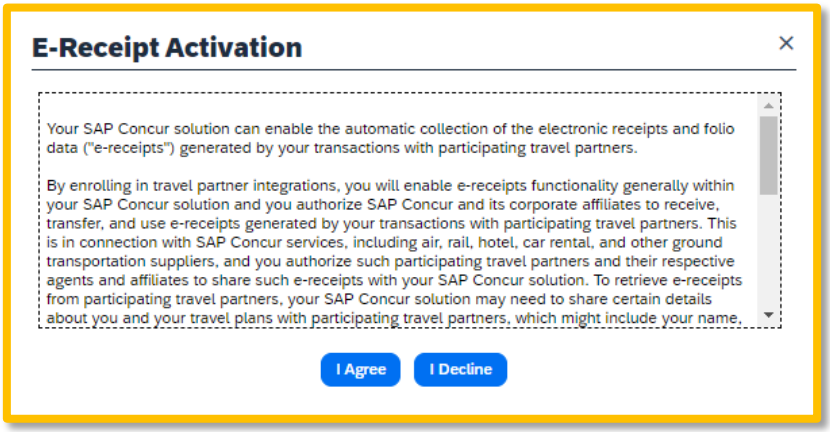
1. A message will appear on the home screen in the Alerts section, prompting you to sign up. On the home page, click **Sign up here**, and the **E-Receipt Activation** page will appear.



OR

Click **Profile > Profile Settings > Other Settings > E-Receipts Activation**.

2. Click **Enable.**



3. The E-Receipt Activation and Use Agreement appears. Click **I Agree** and the e-receipts confirmation will appear.