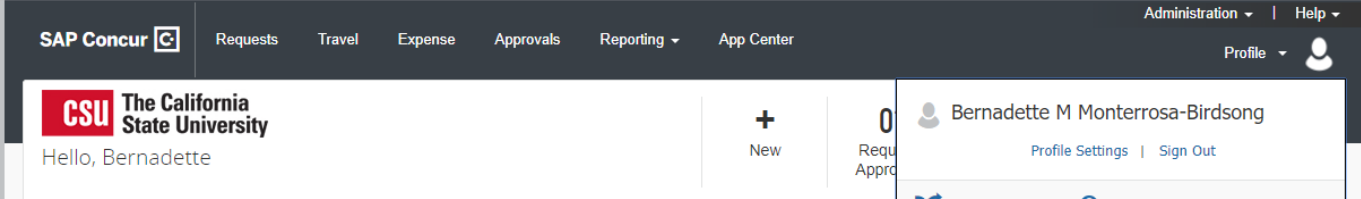


USER CONCUR PROFILE GUIDE



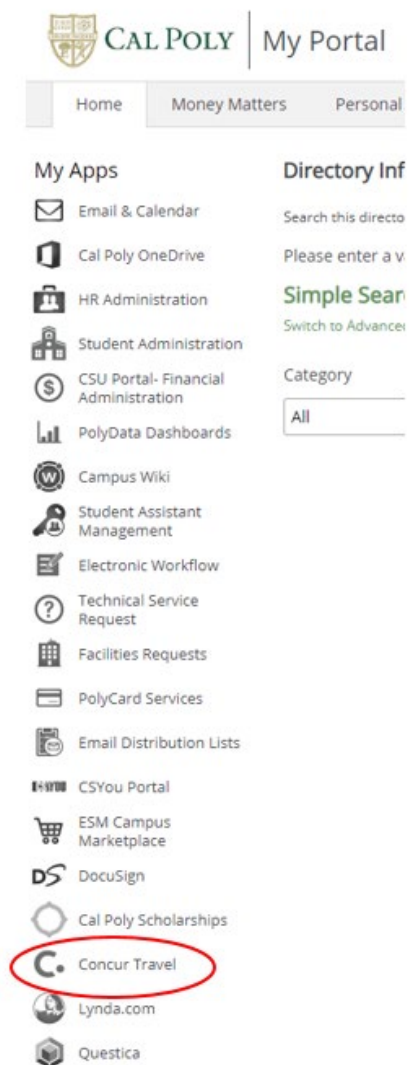
CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

Logging on to Concur

Staff and faculty of the University will have access to the Concur travel and expense management tool.

Users will access Concur through My Cal Poly homepage via single sign on (SSO). Navigate to Concur Travel under My Apps and click on the Concur link. Additional training materials can be found **in the CONCUR PILOT shared folder** on the [Cal Poly Travel webpage](#).

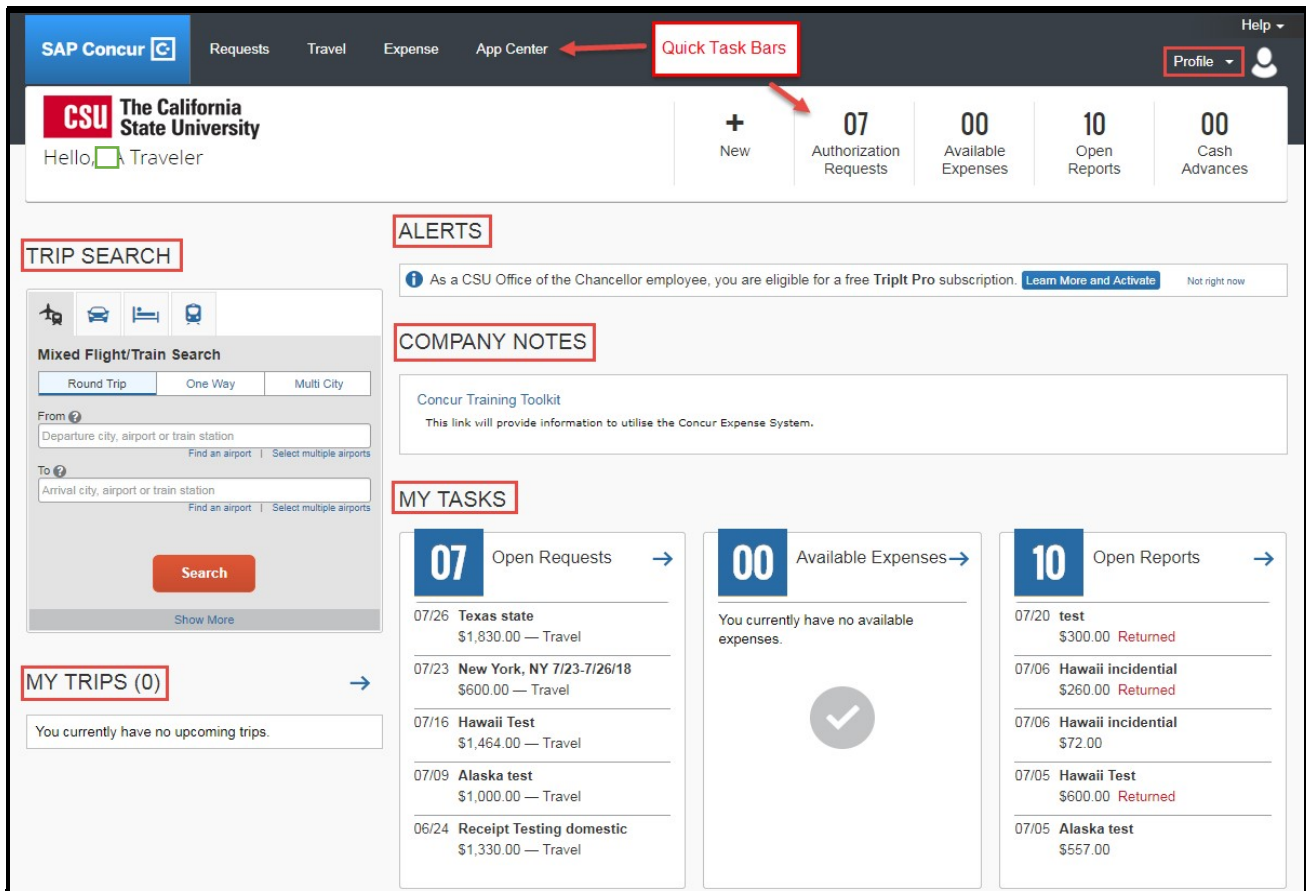
1. Go to my.calpoly.edu.
2. Enter your University User name, and password.
3. Click the link **Concur Travel**.
4. You will be taken to the Concur home page.



Exploring the Home Page

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

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 .

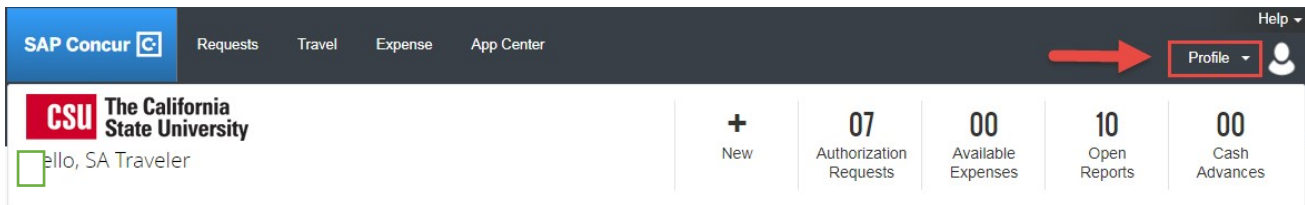


Updating Your Profile

Prior to using Concur Travel to reserve travel, you **MUST REVIEW** and **UPDATE** your Travel 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**.

The screenshot displays the SAP Concur user interface for the 'Profile Options' page. At the top, there is a navigation bar with 'SAP Concur' logo and various menu items like 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. Below this, a secondary navigation bar lists options such as 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Concur Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and includes a sub-header: 'Select one of the following to customize your user profile.' The page is organized into several sections, each with a title and a brief description:

- 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.
- Other Settings:** E-Receipt Activation, System Settings, Connected Apps, Concur Connect, Change Password, Forgot Concur Mobile PIN, Travel Vacation Reassignment, Concur Mobile Registration.

The main content area also includes detailed descriptions for each section:

- 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.

Your Information

I. 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.

II. Company Information – automatically populates

III. Work & Home Address

- Enter work address in **Assigned Location**. Check box next to **Address same as assigned location**.
- Optionally, enter home address.

IV. Contact Information – Required

- Enter a work and home phone number; these can be cell or land lines.
- **We highly recommend you enter your mobile phone number since this will be the main number used to contact you.**
 - A mobile device will allow you to **receive text messages from Concur** informing you of any canceled 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

Home Phone [Required**]

Pager Other Phone

Mobile Phone Country Mobile Phone

V. 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@calpoly.edu	Not Verified	Yes	
Email 3	sacstatetravel@calpoly.edu	Verified	Yes	

- **Verify your email address! Important!**

- Your @calpoly email account will automatically be uploaded into the Concur

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 **Available Receipts** in the Expense portion of the application. It also enables itinerary information to be emailed to plans@concur.com.
- **Additionally, if Group Business Meals are scheduled through Outlook, adding receipts@concur.com when adding Attendees, will automatically populate attendee names for Group Business Meal expense types.**
- 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, click the **Verify** link.
 - Check your email for a verification message from Concur.
 - Copy the code from the email message into the **Enter Code** box next to the email address.
 - Click **OK**.

VI. **Emergency Contact** – Optional, but when traveling, if there should be an emergency, the TMC, Christopherson’s Business Travel, will have access to the **Emergency Contact** information.

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

- If you participate in **Frequent Traveler Programs**, click **Add a Program** in this section.
 - Enter air, car rental, and/or hotel Frequent Traveler program information, separately.
 - Click **“I Agree”** to the terms and conditions.
- If you participate in **Advantage Programs**, click **Add a Program** in this section.
 - Enter Amtrak program information, etc.

- Click “Save” button

- My Travel Network could also link personal charges to your Concur Reporting. Do not enroll in this program.

My travel network, all your reward programs connected in one place

By connecting your reward programs, if you book with participating providers, you'll receive your negotiated rates and amenities, get e-receipts, and your travel plans any time on any device, using Concur or Triplt.

Important terms and conditions apply.

Concur must share information with travel partners as part of connecting your accounts. Learn more about how your information is [shared](#) and [e-receipts](#).

By clicking "I Agree" below, you agree to the terms above and acknowledge that you have reviewed the information on data sharing.

VIII. 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. **TSA Pre** Known Traveler Number

Male Female

- Gender and Date of Birth - **Required**
- If you have a TSA Pre-check number, it can be entered. **Note: TSA Pre-check expires, therefore review your expiration date before you enter it.**

IX. International Travel: Passports and Visas – Recommended for International travelers

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

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)

 United States of America
 123456

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

 Pittsburgh, PA
 United States of America

International Visas

Add a Visa

Visa Nationality Visa Type Visa Number Visa Expiration

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.

- Click **Add a Passport** or **Add a Visa**.
- Enter Passport or International Visa Information.
- Click **Save**.

X. Assistants and Travel Arrangers

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?	Actions
Hutchings, Emily	-	✎ 🗑

[Save](#)

You can give permission for individuals to book travel on your behalf.

XI. Credit Cards – **Required**

Only the university-paid Concur Travel Card may be added to Concur.

The display name for the Concur Travel Card is “Corporate Travel”



Click on **Add a Credit Card** icon, enter card information and select Use this card as the default for: Rail Tickets, Car Rentals, and Hotel Reservations. **A personal credit card should not be used or entered here.**

Add a Credit Card * Required
Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) * Your name as it appears on this card * **VISA**

Card Type * Credit Card Number * Expiration Date *

Use this card as the default card for:
 Rail Tickets Car Rentals Hotel Reservations

Request Settings

- *Information and Preferences are shared between Request and Expense Settings.*
- *Start with Request Settings to set up information, and it will carry through to Expense Settings. Also, if you make changes to one section, the other section will automatically be updated.*

XII. Request Information – auto-populated

The screenshot shows a form titled "Request Information" with a "Save" and "Cancel" button at the top left. The form is organized into a grid of fields:

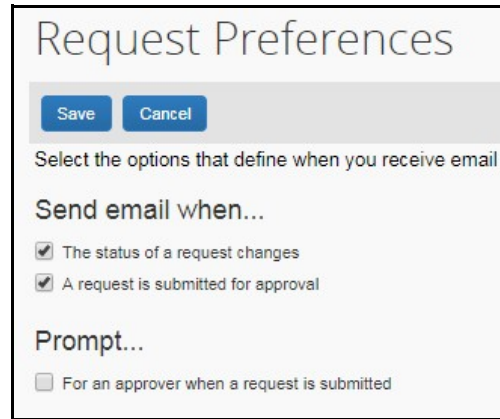
Request Information			
User Group	Reimbursement Currency	Campus	Business Unit
Sacramento	US, Dollar	(SA) Sacramento	(SACST) SACST - Cal State Univ Si
Fund	Department	Program	Class
(MDS01) MDS01 - General Operatin	(48100) 48100 - Accounts Payable		
Project	Traveler Type	Job Code	Employee Record Number
	2-Staff	1740	
Union Code	DeptID Tree Lvl 1	DeptID Tree Lvl 2	DeptID Tree Lvl 3
R07	Admin and Business Affairs	Financial Services	Accounts Payable
DeptID Tree Lvl 4	DeptID Tree Lvl 5		
Accounts Payable	Accounts Payable		

- A default departmental chart string will automatically populate with other HR information.
- All Travel requests will default with this information and can be changed on the report header before submitting a new travel request for approval.

XIII. Request Preferences - Optional

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

- Email notifications
- Prompts



The screenshot shows a dialog box titled "Request Preferences". At the top, there are two buttons: "Save" and "Cancel". Below the buttons, the text reads "Select the options that define when you receive email notifications". Underneath, there are two sections: "Send email when..." and "Prompt...". The "Send email when..." section has two checked checkboxes: "The status of a request changes" and "A request is submitted for approval". The "Prompt..." section has one unchecked checkbox: "For an approver when a request is submitted".

XIV. Request Delegates - please see Assigning Delegate manual

Assign delegates for different roles in Concur. Request Delegates = Expense Delegates.

Expense Settings

- Information, Preferences 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**.

XV. Personal Car

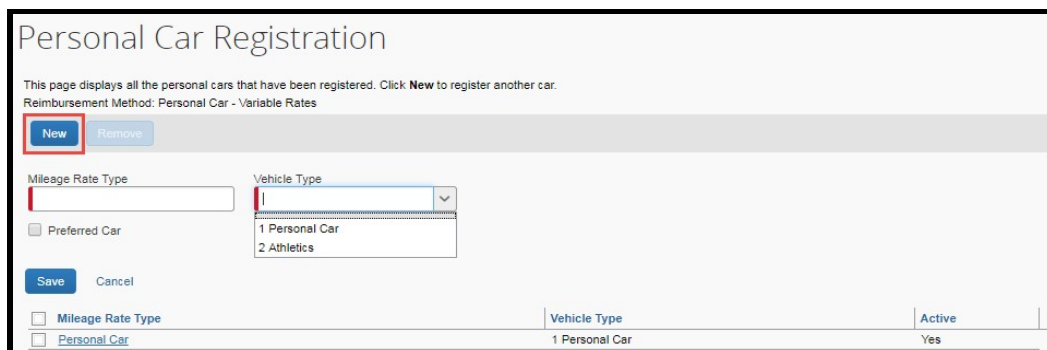
Use the **Personal Car Registration** screen to enter information about your personal car. **Registering a car is required in order to be reimbursed for vehicle mileage.** As the University reimburses individuals at different mileage rates depending upon the nature of the trip, you must register a vehicle for each mileage type in order to receive the associated mileage reimbursement.

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.

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.
3. Enter the **Vehicle Type** as either **Personal Car** or **Athletics** as defined above.
4. Click **OK**.



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, it indicates the 'Reimbursement Method: Personal Car - Variable Rates'. There are two buttons: 'New' (highlighted with a red box) and 'Remove'. The form has two main input fields: 'Mileage Rate Type' (a text box) and 'Vehicle Type' (a dropdown menu). The dropdown menu is open, showing two options: '1 Personal Car' and '2 Athletics'. Below these fields are 'Save' and 'Cancel' buttons. At the bottom, there is a table with columns for 'Mileage Rate Type', 'Vehicle Type', and 'Active'. The table contains one row: 'Personal Car', '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 **Delete**

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
Reimbursement Method: Personal Car - Variable Rates

New **Remove**

Mileage Rate Type: Personal
Vehicle Type: 1 Personal Car

Preferred Car

Save Cancel

<input checked="" type="checkbox"/> Mileage Rate Type	Vehicle Type	Active
<input checked="" type="checkbox"/> Personal	1 Personal Car	Yes

Other Settings

XVI. Enabling 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. 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.