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.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Task Bar</td>
<td>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.</td>
</tr>
<tr>
<td>Profile</td>
<td>Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device.</td>
</tr>
</tbody>
</table>
| 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.
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.

V. Email Addresses – Required

- 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.

VIII. TSA Secure Flight

- 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
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**

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.*
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

- 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

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.

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.
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.

   ![Alerts](image)

   - You haven't signed up to receive e-receipts. @ Sign up here

   - 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.