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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.

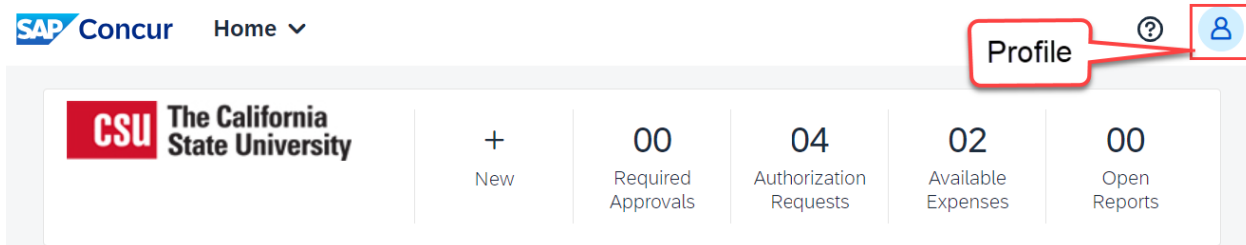
The screenshot displays the SAP Concur Home Page for The California State University (CSU). The top navigation bar includes the SAP Concur logo, a 'Home' dropdown menu, and a 'Quick Tool Bar' with buttons for '+ New', '00 Required Approvals', '04 Authorization Requests', '02 Available Expenses', and '00 Open Reports'. Below the navigation bar, the page is divided into several sections: 'Trip Search' with a search form for flights, hotels, and cars; 'Company Notes' with a link to the CSU Concur website and a warning about booking flights; 'My Tasks' with three cards for '00 Required Approvals', '02 Available Expenses', and '00 Open Reports'; and 'My Trips (1)' showing an upcoming trip from Sacramento to Long Beach in May. Red boxes and arrows highlight key elements like the 'Home' button, 'Quick Tool Bar', 'Trip Search', 'Company Notes', 'My Tasks', and 'My Trips'.

Concur Travel Profile

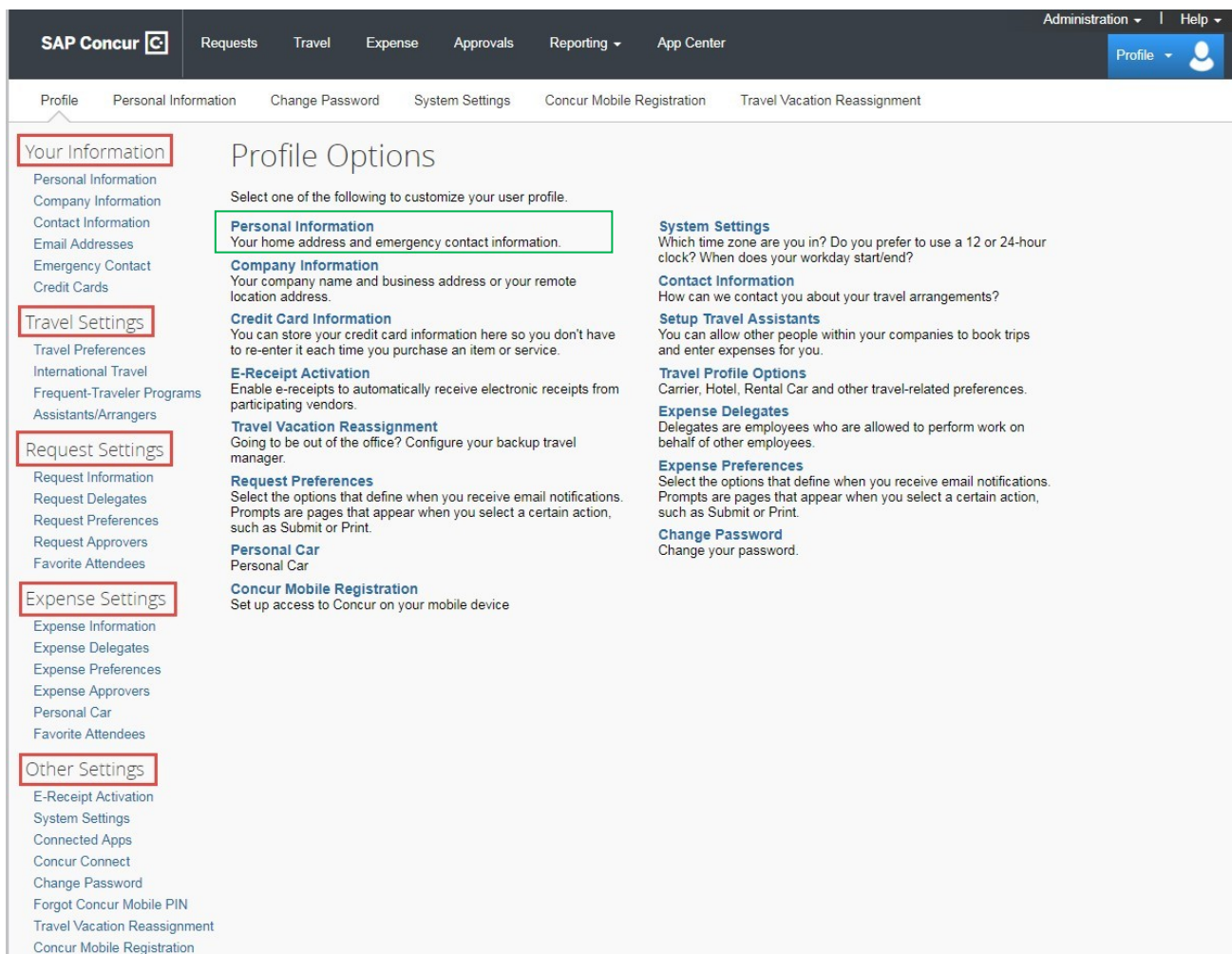
Updating Your Profile

Use the profile options to set or change your personal preferences. To access your profile information:

1. Click **Profile icon**> **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 (used for built-in personal car mileage calculator)– **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?					
<div> Add an email address</div>					
Email Address	Verify	Contact?	Actions		
Email 1 satraveler@csus.edu	<div>Not Verified</div>	Yes			
Email 3 sacstatetravel@csus.edu	<div>Verified</div>	Yes	<div> </div>		

Verify your email address! *Important!*

- Your @csus.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@tripit.com if you have a TripIt account (free Pro account is included with Concur and is optional to use).
- 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.

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	Not Verified	Verify	Yes	✎

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

SAP Concur

Welcome [redacted]
to Concur Email Verification!

You have requested that an email address in your Concur profile be verified. The next step is to log in to Concur and navigate to your Profile Email Addresses section. Copy the verification code listed below and paste it into the adjoining field, as shown here:

Verification Code: 3 [redacted] 3

Example
myemail2@company.com

[Check E-Mail for Code](#) [Resend / Cancel](#)

Enter Code

You are now ready to start sending emails to Concur.

If successful, then you are ready to start forwarding trip E-Mails to Concur.

For additional support, contact your Travel Administrator or Helpdesk.

Cordially,
Your Concur Team.

- 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

- 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.

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs ➕ Add a Program

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

My Travel Network – *Optional*, but recommended for frequent travelers

- Click **"I Agree"** to the terms and conditions.

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.

I Agree No Thanks

TSA Secure Flight- Gender and Date of Birth - *Required*

If you have a TSA Pre-check number, it can be entered.

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

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

☐ 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)

01/02/70 United States of America 123456 07/01/2016

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

06/30/2026 Pittsburgh, PA United States of America

International Visas

Add a Visa

Visa Nationality	Visa Type	Visa Number	Visa Expiration
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- ☐ **Assistants & Travel Arrangers – *Optional***, allows another employee to make travel reservations on your behalf. **Important-** Make sure to add the assistant as a Request Delegate (this will be completed under Request Settings below)

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

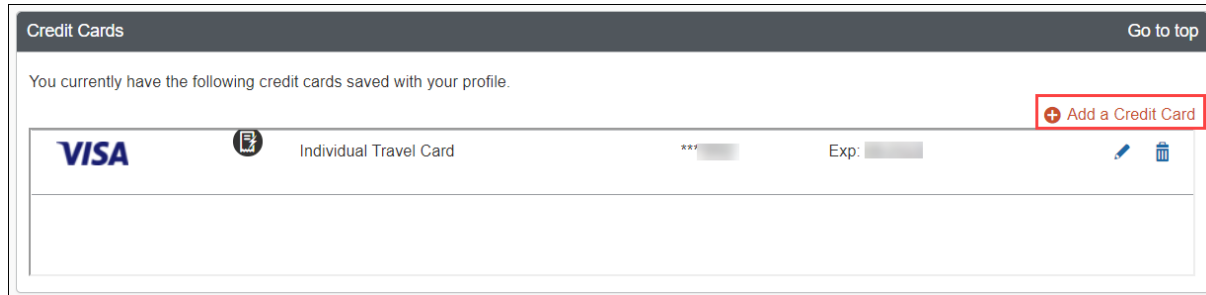
Can book travel?	Is my primary assistant for travel?
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Credit Cards – *Required to Book Travel in Concur*

- ☐ CSU, Sacramento recommends the use of the university-paid travel card if the traveler meets cardholder eligibility.
- ☐ Your University-paid Concur Travel Card will need to be loaded into your profile.

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.

1. Click **Add a Card**



The screenshot shows the 'Credit Cards' section of a user profile in the Concur system. At the top, there is a header bar with 'Credit Cards' on the left and 'Go to top' on the right. Below the header, a message states: 'You currently have the following credit cards saved with your profile.' To the right of this message is a red button with a plus icon and the text 'Add a Credit Card'. Below the message, there is a list of saved credit cards. The first card is a VISA card, labeled 'Individual Travel Card', with a masked card number '***' and an expiration date 'Exp:'. To the right of the card information are icons for editing (a pencil) and deleting (a trash can). Below the list of cards is an empty space for additional cards.

2. Fill in required card information.
3. Billing address for the University-paid Concur Travel Card is the campus address (no mail stop needed):
6000 J Street, Sacramento, CA 95819.
4. Click **Save**.

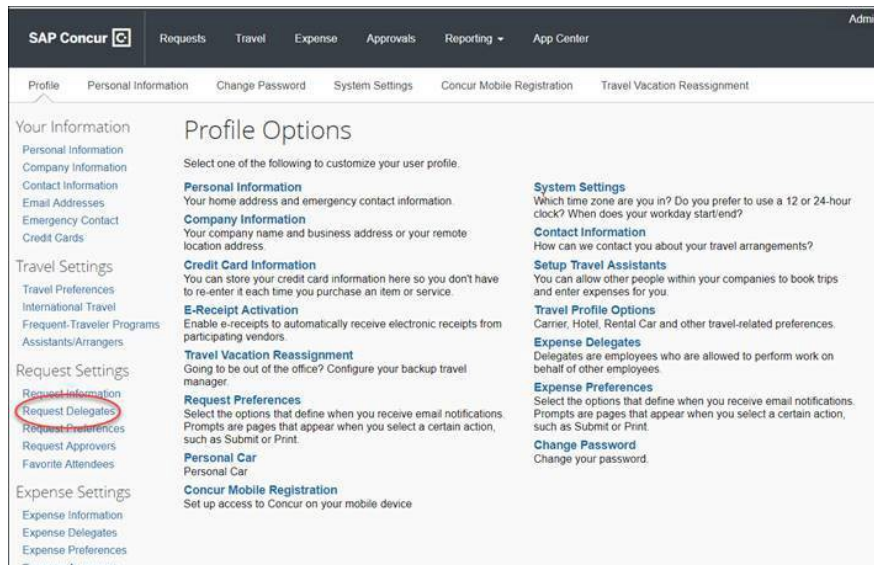
Request Settings

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.
- ☐ Include Assistant & Traveler Arrangers as a Request Delegate. Adding them in this area will give them the ability to view Request/Expense information.

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)

Request Delegates

Delegates Delegate For

Add Save Delete

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

Search by employee name, email address, employee id or login id

Khangura, Daljit **Add** Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Khangura, Daljit daljit.khangura@csus.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**.

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 rate set by 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. 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' 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 says 'Reimbursement Method: Personal Car - Variable Rates'. There are two buttons: 'New' (highlighted with a red box) and 'Remove'. Below the buttons, there are two input fields: 'Mileage Rate Type' and 'Vehicle Type'. The 'Vehicle Type' dropdown menu is open, showing two options: '1 Personal Car' and '2 Athletics'. Below the input fields, there are 'Save' and 'Cancel' buttons. At the bottom, there is a table with two columns: 'Vehicle ID' and 'Active'. The table has one row with '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**.

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 says 'Reimbursement Method: Personal Car - Variable Rates'. There are two buttons: 'New' and 'Remove' (highlighted with a red box). Below the buttons, there is a table with three columns: 'Vehicle ID', 'Mileage Rate Type', and 'Active'. The table has two rows. The first row has '1 Personal Car' and 'Yes'. The second row has '1 Personal Car' and 'Yes', and the 'Vehicle ID' checkbox is checked (highlighted with a red box).

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 LanguageEnglish (United States)

Number Format1,000.00

Placement of Currency SymbolBefore the amount

Negative Number Format-100

Negative Currency Format-100

mile/kmmile

Date Formatmm/dd/yyyy

Time Formath: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 onSunday

Start Day View At08:00 am

End Day View At08:00 pm

Default Viewmonth

Other Preferences

Home Page

Rows per page25

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