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Navigating Concur

Exploring the Home Page

Section	Description
Quick Task Bar	Provides 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 the following options: Flight: Use to book a flight. You can also book a 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 corner of the screen.

SAP Concur Requests Travel Expense Approvals Reporting App Center **Quick Task Bars** Profile Help

CSU The California State University

+ New 00 Required Approvals 01 Authorization Requests 00 Available Expenses 00 Open Reports 01 Cash Advances

TRIP SEARCH **COMPANY NOTES**

MY TASKS

MY TRIPS (0)

"Don't book travel until your request is approved!"

Mixed Flight/Train Search

Round Trip One Way Multi City

From Departure city, airport or train station
Find an airport | Select multiple airports

To Arrival city, airport or train station
Find an airport | Select multiple airports

Search

Show More

Welcome to Concur Travel, the corporate online travel tool for California State University.

Please take a moment to review your profile and ensure that your information is complete.

"DON'T BOOK TRAVEL UNTIL YOUR REQUEST IS APPROVED. If you're booking in Concur, use Trip Search or the Travel tab."

For questions regarding travel reservations or changes to air that has already been ticketed please contact Christopherson [Read more](#)

00 Required Approvals →
Great! You currently have no approvals.

00 Available Expenses →
You currently have no available expenses.

00 Open Reports →
You currently have no open reports.

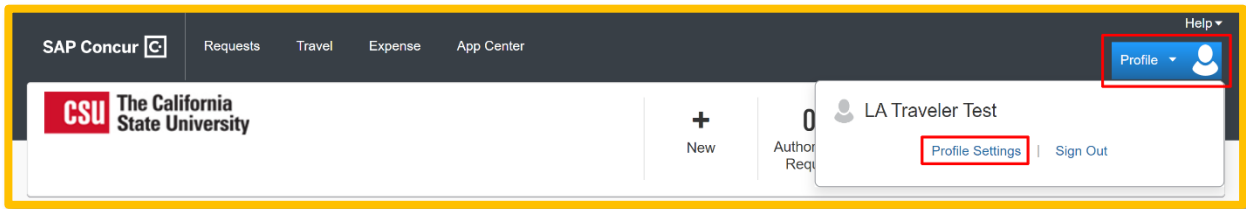
You currently have no upcoming trips.

Concur Travel Profile

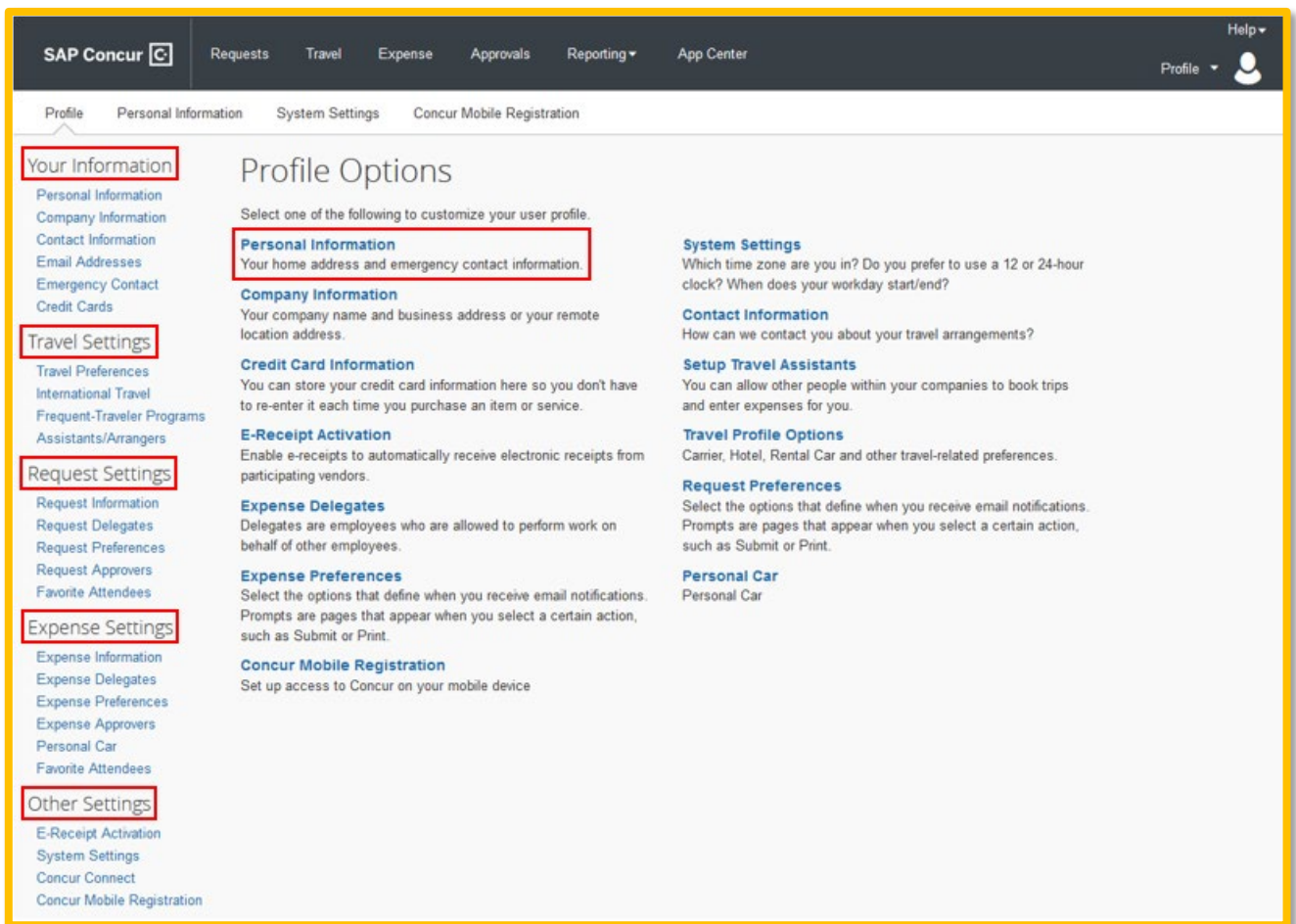
Updating Your Profile

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

1. Click **Profile > 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.



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

a. **Name – Required**

First and **Last Name** will be populated from your HRM record.

1. Add **Middle Name** and, if applicable, **Suffix** to match your government-issued ID.

My Profile - Personal Information

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name [Required]	Preferred Name	Last Name	Suffix
<input type="text"/>	<input type="text" value="LA Traveler"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Test"/>	<input type="text"/>
		<input type="checkbox"/> No Middle Name			

NOTE: 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.

b. **Company Information – Automatically populates.**

Company Information Go to top

Employee ID

Manager Org. Unit/Division Employee Position/Title

c. **Work Address – Required**

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

Work Address Go to top

Company Name: CSU Office of the Chancellor
 Assigned Location: Los Angeles (Los Angeles, CA)

Street: 5151 State University Drive Address same as assigned location

City: Los Angeles
 State/Province: CA

Postal Code: 90032
 Country/Region: United States of America

d. **Home Address – *Optional***

Home Address Go to top

Street:

City:
 State/Province:

Postal Code:
 Country/Region: United States of America

e. **Contact Information – *Required***

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.

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/Region: United States of America (+1)
 Mobile Phone

****You must specify either a home phone or a work phone.**

f. **Email Addresses – Required**

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [How do I verify my email address?](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [If I am a travel arranger or delegate, what do I need to do?](#)
- ▶ [I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?](#)

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 @calstatela.edu	Verified	Verify Disable Verification	Yes	+ Add an email address

NOTE: *Important!* Verify your email address.

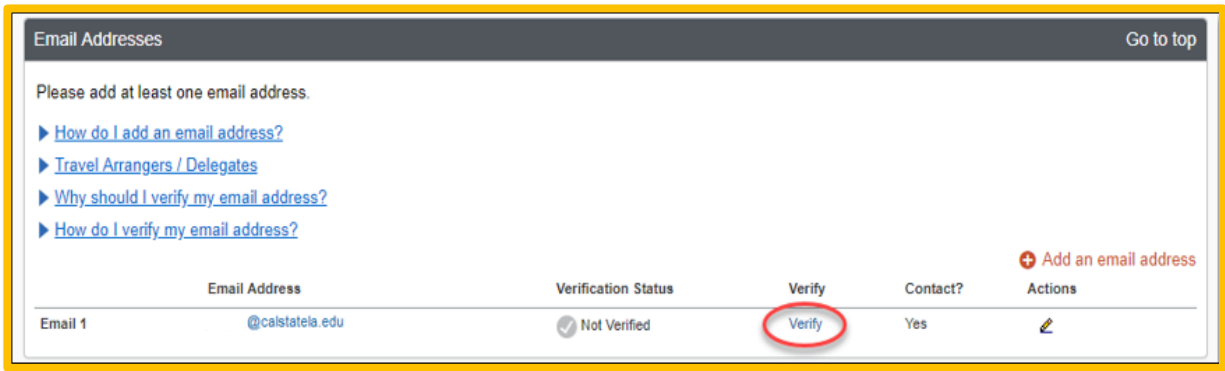
Your [@calstatela.edu](#) email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the **Verify** link. By verifying your email address, Concur can associate your email address with your Concur account.

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](#).

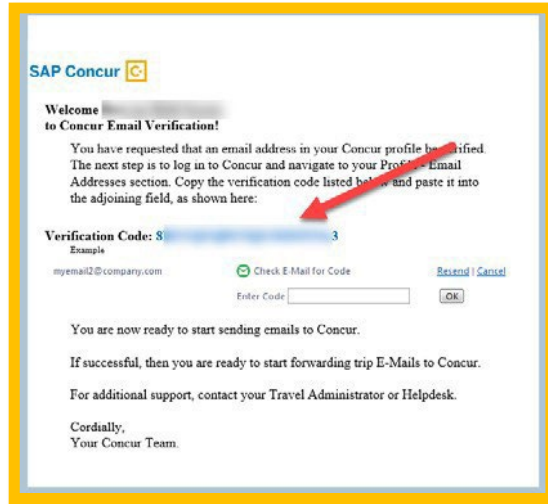
Additional work and personal email addresses can be added by clicking **Add an Email Address**. Enter the email address and select whether you want travel notifications to be sent to that email. Click **OK**.

To verify the email address:

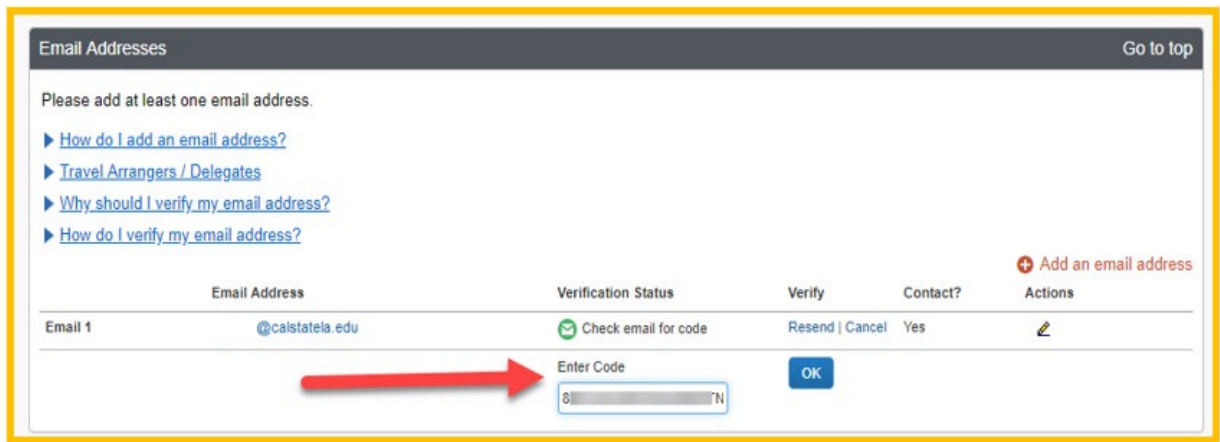
1. Click **Profile > Profile Settings > Personal Information**.
2. Scroll down to **Email Addresses**.
3. Click the **Verify link**.



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**.

g. **Emergency Contact – *Optional***

Emergency Contact
Go to top

Name Relationship

▼

Street

Address same as employee

City State/Province Postal Code

Country/Region Phone Alternate Phone

United States of America ▼

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

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

Travel Preferences
Go to top

Eligible for the following discount travel rates/fare classes

AAA/CAA
 Government
 Military
 Senior/AARP

Air Travel Preferences ?

Seat:
 Seat Section:
 Special Meals:
 Ticket Delivery:

Preferred Departure Airport:
 Other Air Travel Preferences:
 Medical Alerts:

Hotel Preferences

Room Type:
 Smoking Preference:
 Message to Hotel Vendor:

I prefer hotel that has:

a gym
 a pool
 a restaurant
 room service
 Early Check-in

Accessibility Needs

Wheelchair access
 Blind accessible










Car Rental Preferences

Car Type:
 Smoking Preference:
 Car Transmission:

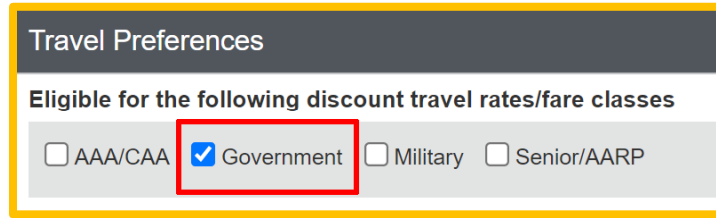
Message to Car Rental Vendor:

Frequent-Traveler Programs

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

	DELTA	Delta SkyMiles	Search this vendor	9132138489	 
	Southwest	Southwest Rapid Rewards	Search this vendor	20775255874	 
	Marriott	Marriott (MC) Honored Guest / Club Marquis	Search this vendor	321680896	 

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

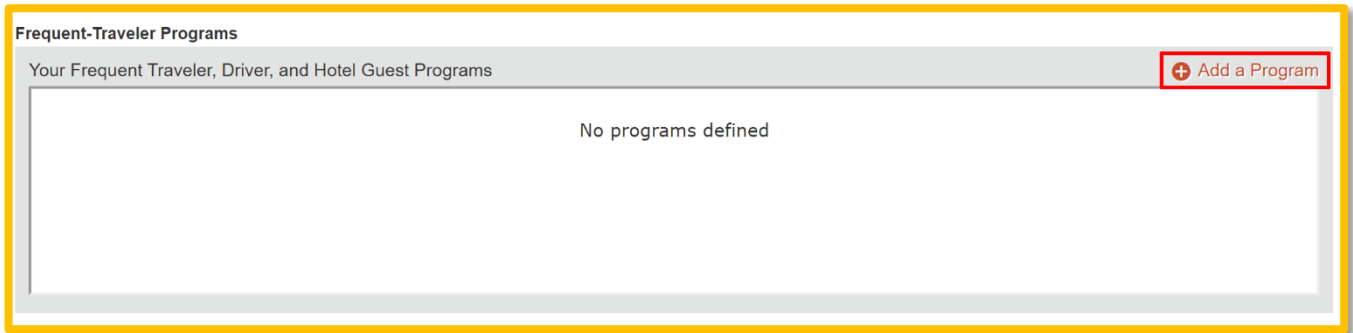


Travel Preferences

Eligible for the following discount travel rates/fare classes

AAA/CAA **Government** Military Senior/AARP

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

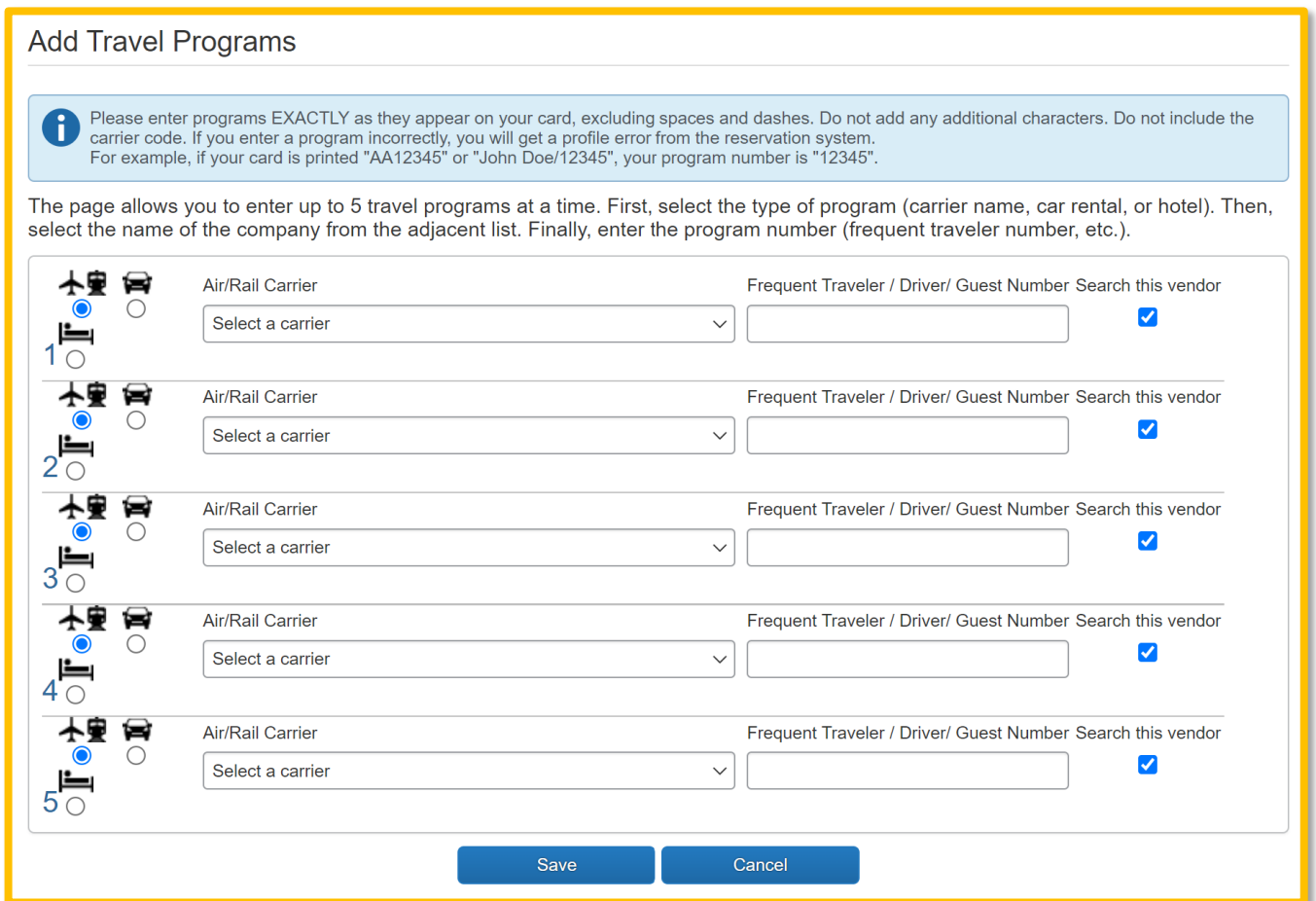


Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs [+ Add a Program](#)

No programs defined

3. Enter air, car rental, and hotel Frequent Traveler program information. Click **Save**.



Add Travel Programs

i Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

Program Type	Carrier/Company	Program Number	Search Vendor
1. Air/Rail Carrier	Select a carrier		<input checked="" type="checkbox"/>
2. Air/Rail Carrier	Select a carrier		<input checked="" type="checkbox"/>
3. Air/Rail Carrier	Select a carrier		<input checked="" type="checkbox"/>
4. Air/Rail Carrier	Select a carrier		<input checked="" type="checkbox"/>
5. Air/Rail Carrier	Select a carrier		<input checked="" type="checkbox"/>

[Save](#) [Cancel](#)

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

i. **Gender and Date of Birth – Required**

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] Male Female **Date of Birth (mm/dd/yyyy)[Required]** **DHS Redress No.?** **TSA Pre✓ Known Traveler Number?**

j. 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] Male Female **Date of Birth (mm/dd/yyyy)[Required]** **DHS Redress No.?** **TSA Pre✓ Known Traveler Number?**

k. **International Travel: Passports and Visas – Recommended for International travelers**

1. Click **Add a Passport** or **Add a Visa**.

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] Male Female **Date of Birth (mm/dd/yyyy)[Required]** **DHS Redress No.?** **TSA Pre✓ Known Traveler Number?**

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

International Visas **+ Add a Visa**

2. Enter Passport or International Visa Information, then 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 Nationality Passport Number Passport Date Issued (mm/dd/yyyy) Passport Expiration (mm/dd/yyyy)

Passport Place Issued (City, State) Passport Place Issued (Country/Region)

International Visas

Add a Visa

Visa Nationality Visa Type Visa Number Visa Expiration

Visa Nationality Visa Type Visa Number Visa Expiration (mm/dd/yyyy) Save Close

NOTE: 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.

I. **Assistants & Travel Arrangers – Recommended**

1. Click **Add an Assistant**.

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

You currently have no assistants defined.

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.

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

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

Save Cancel

3. 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.

m. **Credit Cards – *Required to Book Travel in Concur***

Cal State LA recommends the use of the University-paid travel card if the traveler meets cardholder eligibility.

Your University-paid Travel Card will be loaded into your profile automatically.

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

Credit Cards Go to top

You currently have the following credit cards saved with your profile.

[+ Add a Credit Card](#)

You currently have no credit cards saved.

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

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 *

Card Type * Credit Card Number * Expiration Date *

Use this card as the default card for:

Rail Tickets Car Rentals Hotel Reservations

Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate. Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street * Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City * State * Zip/Postal Code *

Country/Region *

Cancel

NOTE: *Important!* 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.

Request Settings

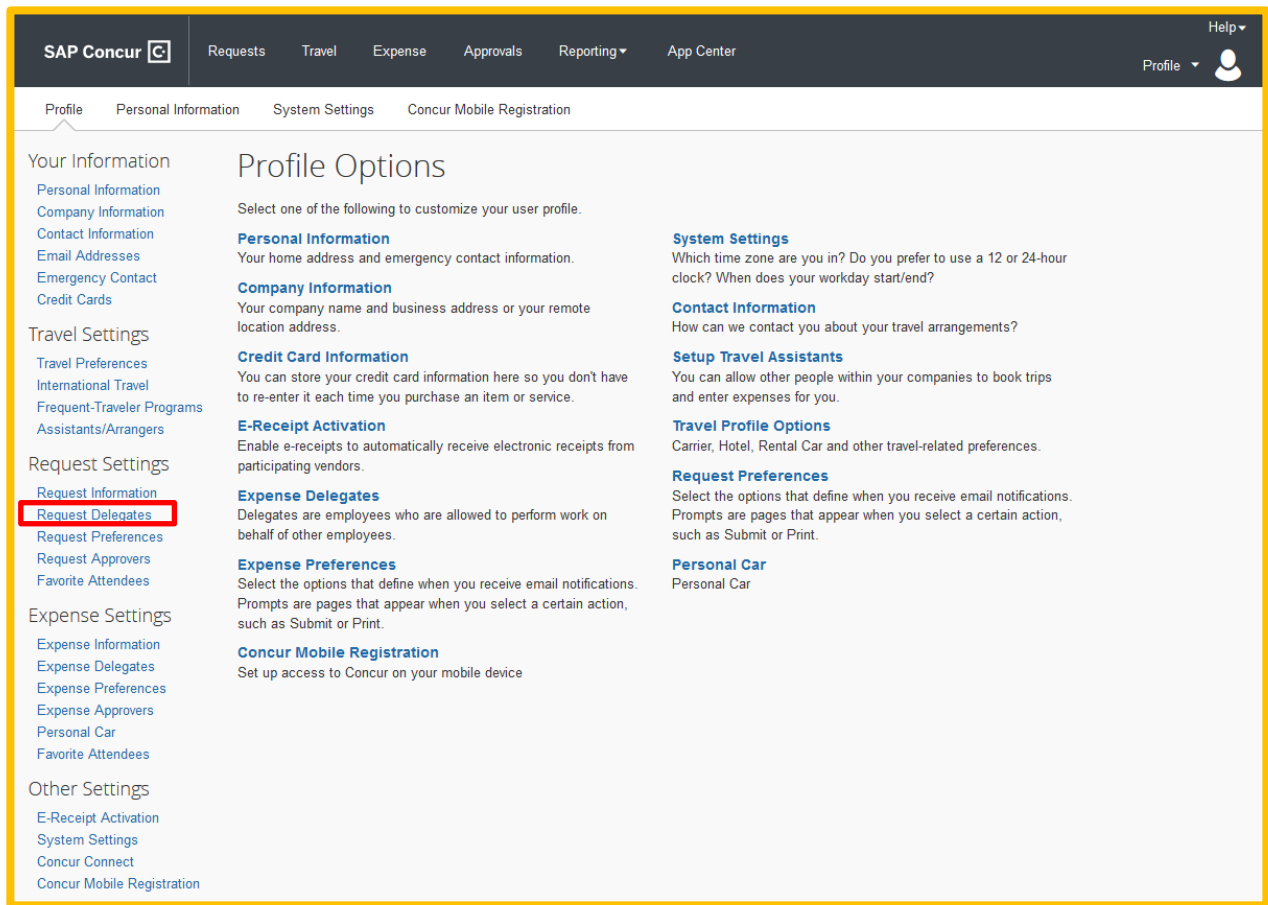
Request Delegates - *Important!*

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.

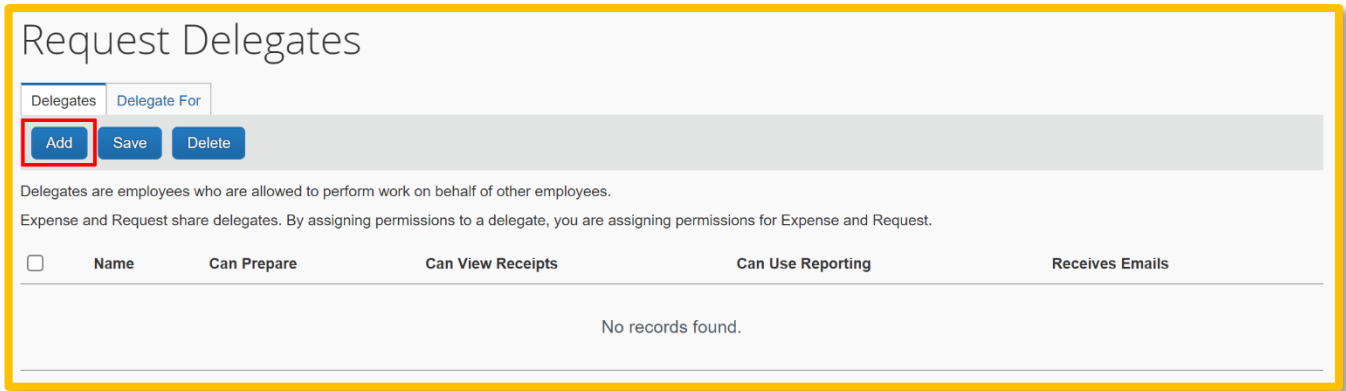
To add a delegate:

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



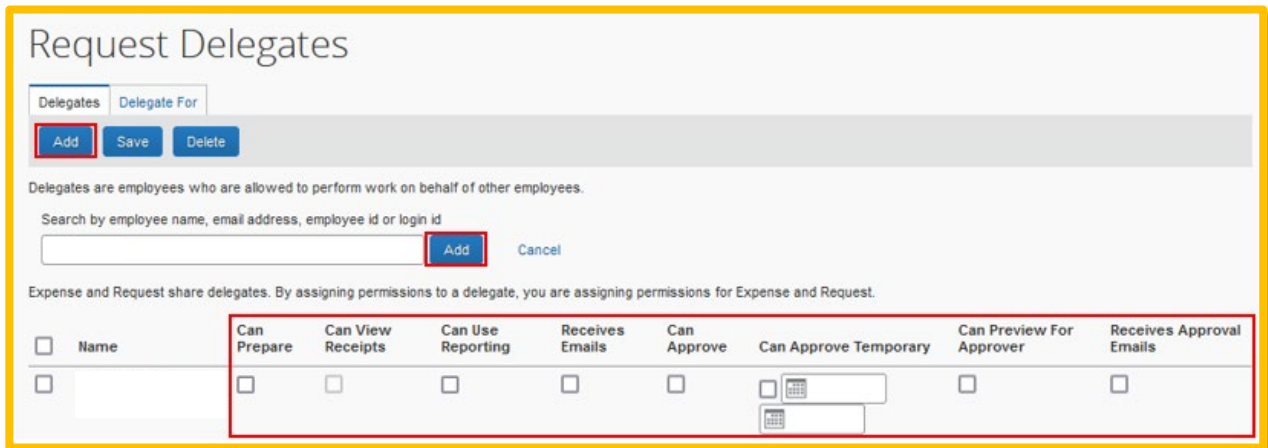
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo and menu items: 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right side of the navigation bar, there is a 'Help' dropdown and a 'Profile' dropdown with a user icon. Below the navigation bar, there is a sub-navigation bar with 'Profile', 'Personal Information', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Request Settings', 'Expense Settings', and 'Other Settings'. The 'Request Settings' section is expanded, showing 'Request Information', 'Request Delegates', 'Request Preferences', 'Request Approvers', and 'Favorite Attendees'. The 'Request Delegates' link is highlighted with a red box. The main content area also includes sections for 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Expense Delegates', 'Expense Preferences', 'Concur Mobile Registration', 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Request Preferences', and 'Personal Car'.

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**.

To **delete a delegate**, click the checkbox to select the person > click **Delete** > confirm deletion.



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.
*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 (e.g. Dean unavailable and approvals would be routed to Associate Dean).*

NOTE: 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**.

Expense Delegates

1. If you are a delegate for others, you can update/maintain that listing within your profile by selecting Profile Settings.
2. Click on **Expense Delegates** on the left-hand side of the page.
3. Select the **Delegate For** tab.
4. Select the users that you want to delete and no longer have delegate permissions for.

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

Expense Delegates

Delegates **Delegate For**

Delete

This employee may act as a delegate for the listed employees.
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	Can Use Reporting	Receives Emails

No records found.

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.**

To register a car:

1. Click **Profile > Profile Settings > Personal Car** (in the Expense Settings section of the left-side menu).

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

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**

<input type="checkbox"/> Vehicle ID	Mileage Rate Type	Active
<input type="checkbox"/> WHEELS1	1 Personal Car	Yes

2. On the **Personal Car Registration** page, click **New**.

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**

Vehicle ID

Mileage Rate Type

Preferred Car

Save **Cancel**

3. Enter 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**.

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, then click **Remove**.

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

Vehicle ID Mileage Rate Type

Preferred Car

<input type="checkbox"/> Vehicle ID	Mileage Rate Type	Active
<input type="checkbox"/> WHEELS1	1 Personal Car	Yes
<input checked="" type="checkbox"/> 1234567	1 Personal Car	Yes

Other Settings

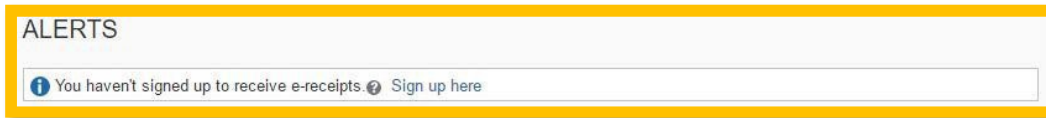
Enabling E-Receipts - *Recommended*

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.

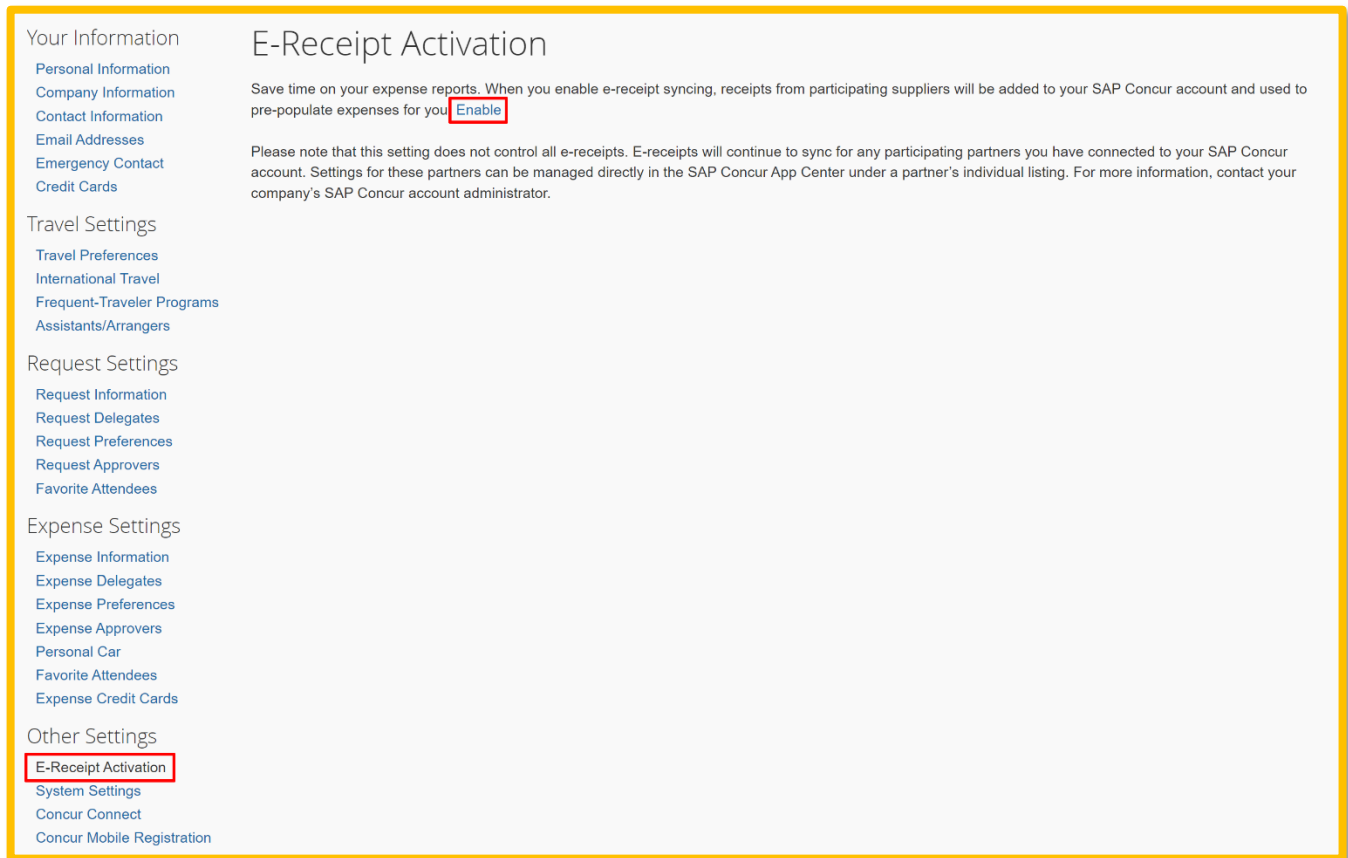
To sign up for e-receipts:

1. 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** (located under the **Other Settings** section of the left-side menu).



2. Click **Enable**. The E-Receipt Activation and Use Agreement appears.
3. Click **I Agree**. The e-receipts confirmation appears. Once you have accepted, if you have a Concur Travel Card it will be opted in.

