



SAP Concur Overview Guide

Rev. 3/8/22

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Resources

There are various sources available to users for reference, guidance, and assistance. This guide will contain all of the information needed to navigate Concur and complete travel tasks in the software. This resource section of the Master Guide will reference other resources, additional training, and general contact information. The resources covered include:

- Contact Information
- Resource Pages
- New User Checklist
- Concur Icon Reference List

Contact Information

Stephen F. Austin Contacts

Travel Office: traveldesksfasu.edu

CTP Contacts

Concur CTP Help

Email: na.online@travel.ctm.com

Phone: 877-208-1396

CTP Full Service

Email: sfasu@ctp-travel.com

Phone: 855-456-4474

Group Travel

Email: groups@ctptravelservices.com

Phone: 800-810-2695

CTP After-Hours Number

Phone - 844-964-0088

**\$16/ hour fee may apply for after-hours calls*

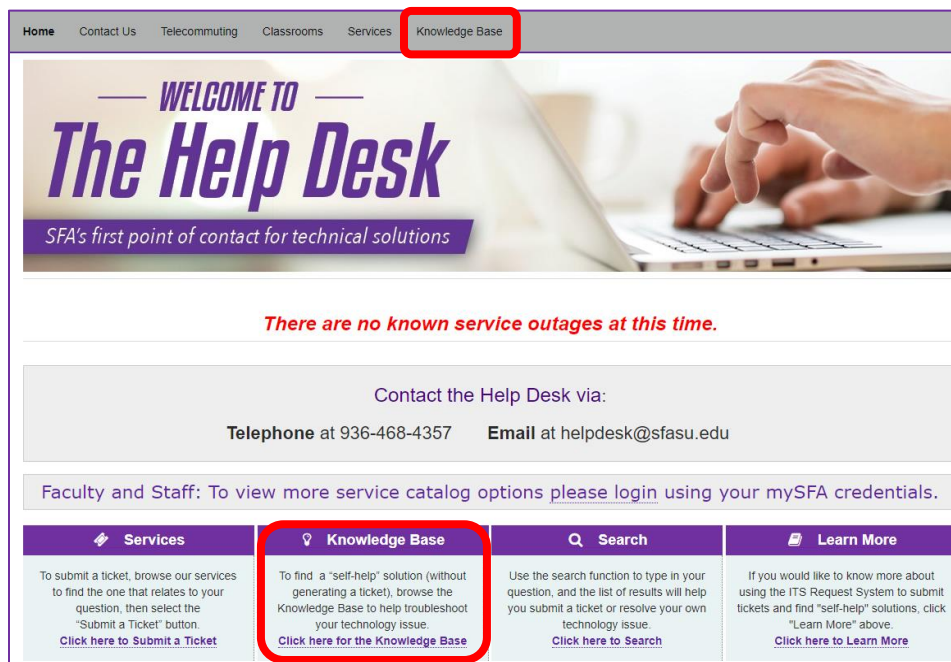
Resource Pages

While this Master Guide contains much of the written information about Concur, there are additional resources users can utilize to find solutions and become better informed.

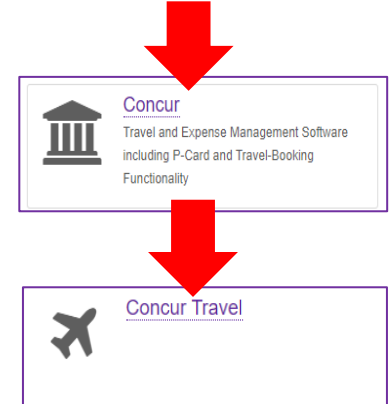
Knowledge Base

The knowledge base is a specially made area that includes valuable information about Concur and is probably the most helpful resource for SFA travel. From those with little to no knowledge of Concur to active users, there are materials here to help anyone. The knowledge base is divided between Concur Travel and P-Card. Within the Concur Travel category, there are guides, videos, past recordings and more.

The knowledge base can be found by going to help.sfasu.edu then clicking on “Knowledge Base” at the top or towards the bottom of the home page.



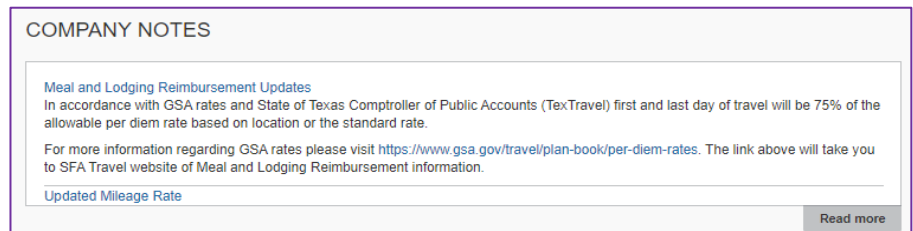
Once in the Knowledge Base, select “Concur” in the list of categories, then choose “Concur Travel”.



Company Notes

A primary area to refer to and monitor is the “Company Notes” section of the Concur home page. This area will contain updates and changes to travel and travel policy as well as additional travel information and training and is maintained directly by SFA’s Travel Office.

To find the Company Notes, login to Concur; the notes will be located near the middle of the page. Click “Read More” to view the resources available.



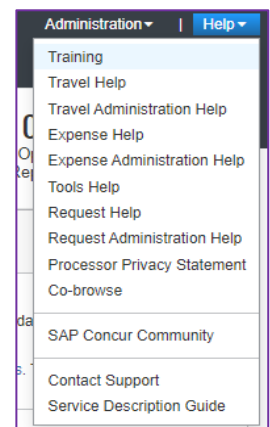
Concur Training Site

Once logged into Concur, go to the “Help” dropdown in the top right of the home page and choose “Training”. The user will be brought to the Concur Training Site.

This site will include Guides in the center of the page and links for app assistance at the very bottom, but the most helpful area of this site is the far-left training videos.

The training videos broken down into three sections: Expense, Request, and Travel. Click the plus to expand the video lists. Each section will contain multiple easy-to-watch, brief, Concur-made videos.

- Expense Section deals with expense reports, T-card charges, receipts, and other tasks that are completed on the expense report after the trip is completed.
- Request Section covers procedures and tasks on the request side of travel, before the trip occurs, before funds are spent, and before anything is booked.
- Travel Section covers the booking aspect of concur.



New Concur User Check List

Welcome to Concur! This checklist will cover what you need to get setup within Concur.

- **Login to Concur**
 - Located in mySFA under the Resource tab
 - Use mySFA credentials to login

- **Go to your profile and confirm profile information**
 - Name, ID, basic contact information
 - Add any desired information (phone number, alternate email, emergency contact, etc.)
 - Activate e-receipts

- **Verify email address**
 - Your SFA email will automatically appear.
 - Users must click “Verify” and follow the prompts sent to your email.
 - Click yes for contact on the email you want to use for point of contact.

- **Complete Delegate Information**
 - If you are a user who wants a delegate, go to “Request Delegate”.
 - Add your desired delegate (usually this is your departments’ admin).
 - Select the desired permissions (prepare requests/reports & submit requests/reports).
 - NOTE: Users can add their own delegates, but delegates cannot select their own users.















- **Complete booking preferences and contact**
 - In the profile, enter in home address, phone numbers, other contact info.
 - Add a Travel Assistant or Travel Arranger to profile (allowing another user to book on your behalf).
 - Enter any travel preferences (improves travel booking experience).
 - Verify your name on your profile matches the name used to travel.

- **Concur Mobile Registration**
 - On the very bottom of the profile list you’ll find “Concur Mobile Registration”.
 - Get started by going there and click “Get Started” .

If there is any issue with logging in or completing the above tasks, contact the travel office at traveldesks@sfasu.edu

Concur Icon Reference Guide

A user will see a number of icons while entering in Requests and Reports. Hover over the icon to see what it means, or refer to the reference guide below to see what the most common icons mean:

-  **Attendees:** An expense entry has associated attendees
-  **Comments:** An expense entry has comments
-  **Credit Card:** An expense entry was a corporate credit card transaction
-  **Credit Card:** A corporate credit card transaction includes additional data
-  **Exception:** An expense entry exception that must be resolved before submission
-  **Warning:** An expense entry warning that may require additional action
-  **Full Allocation:** An expense entry has been fully allocated
-  **Receipt Required:** An expense entry requires a receipt
-  **Receipt Attached:** An expense entry has a receipt attached
-  **ExpenseIT Receipt:** An expense entry was created using the ExpenseIT mobile app
-  **Missing Receipt Affidavit:** A missing receipt affidavit was attached to the expense
-  **Mobile Transaction:** An expense entry was created using the Concur mobile app
-  **Personal Expense:** An expense entry was marked as a personal expense
-  **Submission:** An expense report prepared by a delegate is ready for submission

Concur Basic Training Manual

Introduction

SAP Concur is a travel and expense module intended to streamline and improve Stephen F. Austin State University's travel reimbursement program.

This manual will provide a brief overview of Concur's Travel and Expense module to introduce the user to the travel software and its basic functionality. In this manual, we will cover the following:

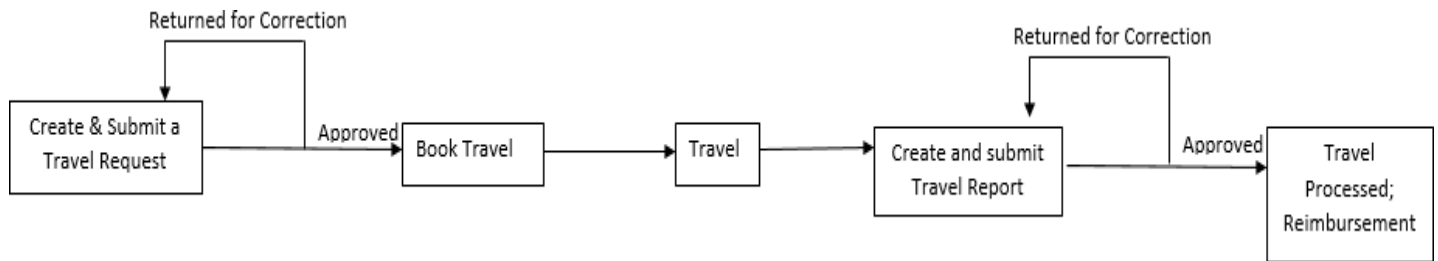
- Signing in
- The Home Pages
- Additional Pages
- User profile and set up
- The Concur App
- Other resources

Terms

- **Agency Booked** - Travel booked through CTP. Requires contacting CTP after request is approved.
- **Approver** - Employee approving requests and reports in the workflow.
- **CTP** – Corporate Travel Partners; SFA travel management company.
- **Delegate** - Employees who are allowed to perform work on behalf of other employees. Delegates can create and prepare requests and reports, but they cannot submit the requests and reports on behalf of the traveler.
- **Expenselt** – A Concur Tool that uploads, reads, and processes receipts.
- **Financial Manager** – Employee in the workflow that approves for a specific FOAP.
- **Paid By** – Payment method.
 - **Paid by Traveler** – cash, personal debit or credit card, check, or otherwise paid personally by the traveler and requires reimbursement to the traveler.
 - **Paid by University** – Direct billing, University card, or otherwise paid by the University and does not require a reimbursement to the traveler.
- **SAP Concur Travel and Expense Module (T&E)** – The travel module where travel requests, travel reports, and travel booking can be prepared, submitted, and approved.
- **Self-Booked through Concur** – Travel booked through Concur Travel tab.
- **Supervisor** – Manager or department supervisor who reviews and approves travel for the department.
- **Travel Report** – Formally known as a Travel Report (TR), a report prepared and submitted after a trip to request reimbursement or payment of expenses incurred during the trip.
- **Travel Request** – Formally known as a Travel Authorization (TA), a request is the approval to travel and book as well as the encumbrance of funds for travel.
- **Travel Segments** - The airfare, auto rental, and lodging portions of the trip. These segments are entered in the request and then booked through Concur or by contacting CTP.

Getting Started

The basic flow of Concur:



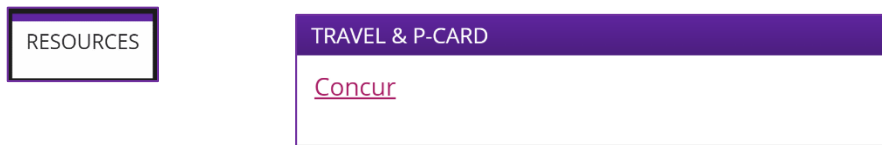
Concur can be accessed through the link in mySFA under the Resources tab (use your mySFA credentials to login)

Important Note

To comply with Texas Administrative Code Title 34, Section 5.61 travelers must submit their own travel requests and travel reports. Delegates can still prepare the Requests and Reports, but travelers must submit the Request and/or Report themselves. Instead of the “Submit” button, there will be a “Notify Employee” button as shown below. Clicking “Notify Employee” will send an email to the traveling employee with a link to access Concur and submit the Request or Report.

Signing in

Users should access Concur by logging into mySFA, then navigating to:
Resources tab → Travel & P-Card heading → Concur link



The Home Page

A user's home page appearance will vary based on the user's permissions. Below is a general home page.

1. Along the top left of the screen, are the different Concur pages.
 - a. "SAP Concur" will return the user to the homepage.
 - b. The "Request" tab will bring the user to the travel request page.
 - c. "Travel" will bring a traveler to the CTP portion of the module and allows users to search for and book travel segments.
 - d. The "Expense" tab displays the travel reports.
 - e. "Approvals" will be where reports will go in workflow that need to be approved (if applicable).
 - f. App Center offers users the ability to search for and connect various travel apps such as Uber, airfare, and other 3rd party apps.

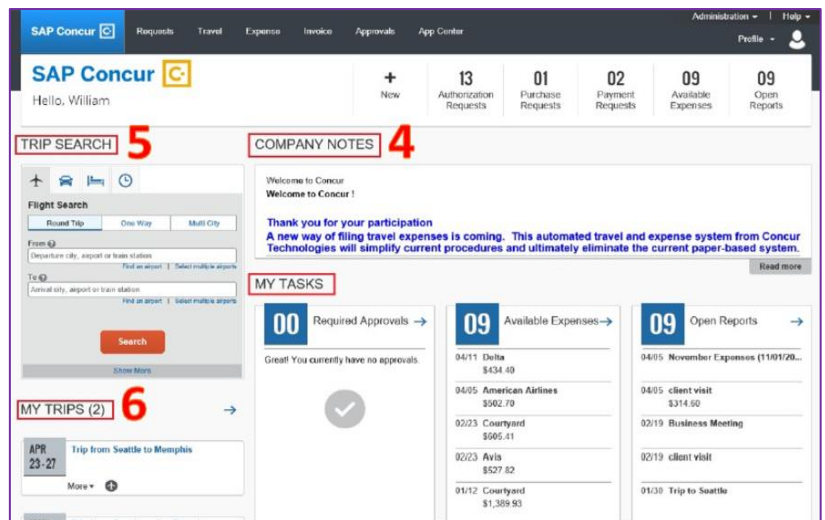
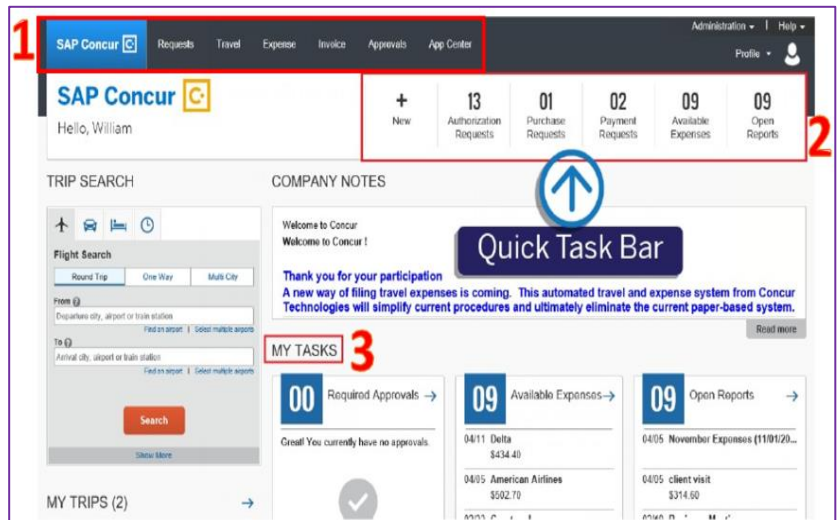
2. The Quick Task Bar offers links to quickly start a new request, open reports and requests, and manage available expenses. Additionally, it offers a quick reference to view number of requests, reports, and other expense tasks.

3. The My Tasks portion of the home page gives additional visibility to view available expenses, open reports, and approvals that may require the user's attention.

4. Company Notes is a section containing valuable information, tips, and resources from the SFA Travel Office.

5. Trip Search is where the user can search for and book travel segments such as airfare, rental, and lodging.

6. The "My Trips" portion lists upcoming trips.



Concur Pages

This section of the manual will cover the Requests, Expense, and Receipts screens within Concur. These are important sections to prepare travel, create reports, and assign charges.

Travel Requests

The Travel Requests screen displays the travel request reports that have been created and/or submitted. The user would come to this screen to create a new request, review a request that has already been created, and submit requests.

1. Across the top, there are three options:
 - a. Manage Request displays the following screen. This shows all active requests and allows the user to search for requests, create new requests, and open requests.
 - b. The New Request option creates a new travel request.
 - c. The Quick Search allows the user to search and find a request.
2. Below those options lists the request for that traveler. The far left lists the name of the request and additional details as well as the request ID and the status of the request.
3. The far right of the screen lists the trip dates, submitting date, the amount request and the amount remaining from the request.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a.	Remaining	Action
Hollywood Trip: VP approved trip to see the walls of fame	334R	Approved	05/29/2020	05/21/2020	\$1,670.00	\$1,670.00	\$-217.00	Expense
Pearl and Luchini in Las Vegas: Bringing Theatre and Cinematography students to Las Vegas to research the movie	334T	Approved	05/29/2020	05/29/2020	\$0.403.00	\$0.403.00	\$1,200.89	Expense
Comment: change business meals to group meals			08/04/2020					
Comment: 21K ok? need audit rule	3383	Approved		05/29/2020	\$0.00	\$0.00	\$0.00	Expense
Pacific DC Trip: Department Study to find out which Parks is the "Real" Park	3384	Approved	08/10/2020	05/29/2020	\$3,823.49	\$3,823.49	\$2,898.80	Expense
Comment: De the Washington DC form			08/14/2020					
Isotester/Carry Forward: Testing test carry forward fix	338A	Approved	08/24/2020	05/29/2020	\$1,428.00	\$1,428.00	\$417.32	Expense
Vampire Hunting: International Grant	338C	Approved	08/26/2020	05/29/2020	\$1,467.13	\$1,467.13	\$807.72	Expense
Comment: remove advance			10/30/2020					
Houston/area Conference: Presenting paper at conference	338G	Approved	11/03/2020	06/03/2020	\$268.00	\$268.00	\$268.00	Expense
Comment: remove advance			06/08/2020					
Allocation/Confirmation: Allocation feature, testing allocation feature, receipt handling, cash advance (partial receipt), lodging expense, Misc expense field	338J	Approved	06/10/2020	07/04/2020	\$538.00	\$538.00	\$185.84	Expense
Currency/our: Testing currencies, additional advance and international testing	338M	Approved	06/10/2020	06/04/2020	\$2,600.00	\$2,600.00	\$1,608.27	Expense
Advance/State: SFA v Arkansas State	338P	Approved	08/09/2020	06/05/2020	\$10,000.00	\$10,000.00	\$2,709.40	Expense
HF Convention: Testing Partial personalized itemizations, allocations, CC expenses, printing reports	339Q	Approved	08/19/2020	06/05/2020	\$1,400.00	\$1,400.00	\$718.53	Expense
Comment: print reports			09/14/2020					
Card/ing: Testing cash advance x100% audit rule, 100% audit rule, out of state, T-Card and allocation	339U	Approved	09/17/2020	06/08/2020	\$2,000.00	\$2,000.00	\$986.00	Expense
Card/ing: Testing cash advance x100% audit rule, 100% audit rule, out of state, T-Card and allocation			11/01/2020					
Card/ing: Testing cash advance x100% audit rule, 100% audit rule, out of state, T-Card and allocation			11/04/2020					
Card/ing: Testing cash advance x100% audit rule, 100% audit rule, out of state, T-Card and allocation			12/01/2020	06/08/2020	\$987.00	\$987.00	\$987.00	Expense
Card/ing: Testing cash advance x100% audit rule, 100% audit rule, out of state, T-Card and allocation			12/03/2020					

Travel Expenses

The expense screen will display the active travel reports that have been created, submitted, or are in process.

1. The top options allow the user to manage expenses (expense reports, T-card expenses, and receipts) as well as view cash advances.
2. Below that are the active reports. There is an option to create a new report, but it also shows the submitted reports, pending reports, and approved reports. The report box will display green if there are no issues, yellow if there are issues to address, and red if there is a problem that needs to be addressed or returned for correction.

NOTE: Each report box will include submission dates, total amount, status, as well as any exceptions that need to be reviewed.

The screenshot shows the SAP Concur Expense screen. At the top, there are tabs for Requests, Expense, Approvals, and App Center. Below the tabs, there are links for Manage Expenses and View Cash Advances. The main section is titled 'Manage Expenses' and 'ACTIVE REPORTS'. On the left, there is a 'Create New Report' button. To the right, there are eight report cards arranged in a 2x4 grid. Each card shows the report name, submission date, total amount, and status. The reports are: WorkflowTest7, mileagetest, RoundRockExpress, Apptest3, Apptest2, AppTest1, and Houston 6-17. The 'Report Library' link is on the right side of the screen.

Report Name	Submission Date	Total Amount	Status
WorkflowTest7	06/18/2020	\$728.65	Submitted
mileagetest	06/19/2020	\$3.45	Submitted & Pending Supervisor Approval
RoundRockExpress	06/17/2020	\$391.12	Submitted
Apptest3	06/17/2020	\$277.80	Submitted
Apptest2	06/16/2020	\$142.09	Submitted
AppTest1	06/16/2020	\$290.00	Submitted
Houston 6-17	06/10/2020	\$316.38	Submitted

3. Clicking “report library” will show the expense reports in the manner the requests are – a long lists with more details.

The screenshot shows the SAP Concur Expense screen with the 'Report Library' link clicked. The screen displays a list of reports for the last 90 days. The list includes columns for Report Type, Report Name, Report ID, and Comments. The reports are: CrownPlaza, College Station TX, and Annual Work Retreat. The 'CrownPlaza' report has a yellow warning icon and a message: 'This report has one or more entry level exceptions.' The 'College Station TX' report has a yellow warning icon and a message: 'This report has one or more entry level exceptions.' The 'Annual Work Retreat' report has a yellow warning icon and a message: 'This report has one or more entry level exceptions.'

Report Type	Report Name	Report ID	Comments
Expense Type	CrownPlaza	FOC509F104947AA822	
Expense Type	College Station TX 10-01/10-5	6B78B6A446BC4CC067EB	sdh
Expense Type	Annual Work Retreat		

Expense and Receipt Library

Located under the expense section, the user can scroll below the expense reports and find the expenses and receipts. The expenses are T-Card charges that have been loaded into Concur and available expenses created from receipts.

Receipts are listed below. Receipts can be loaded into Concur from a number of ways:

1. By clicking the “Upload New Receipt” option.
2. Emailing receipts from your @sfasu.edu email to receipts@expenseit.com.
3. Through the Concur app.

Attachments must be 5 MB size or lower and must be one of the following file types: png, jpg, jpeg, pdf, tif, or tiff. Receipts must be 300 DPI resolution or lower so it is recommended to be in black and white.

Once uploaded, Concur will scan and process the receipt and create an expense line with the name of the vendor, transaction dates, amounts, and other information. These lines and receipt images can be assigned to reports from this portion or from within the report.

The screenshot displays the SAP Concur web interface. The top navigation bar includes 'Requests', 'Expense', 'Approvals', and 'App Center'. The 'Expense' tab is active, showing the 'Manage Expenses' section. Below this, there is a table titled 'AVAILABLE EXPENSES' with columns for 'Expense Detail', 'Expense Type', 'Source', and 'Date'. The table lists three expense lines: 'United' for 'Baggage Fees' on 11/10/2019, another 'United' for 'Baggage Fees' on 11/10/2019, and '_Baggage Fees Houston, Texas' for 'Baggage Fees' on 11/12/2019. To the right of the table, there is a section titled 'AVAILABLE RECEIPTS'. It features a large orange box with a plus sign and the text 'Upload New Receipt' and 'Click here or drag & drop files to upload new receipt images.' Below this, there are three smaller preview images of receipts, each with a 'Delete' button. The first receipt is labeled 'example.afare.JPG', the second 'example.baggagefee.JPG', and the third 'example.doubletree.JPG'.

User Profile

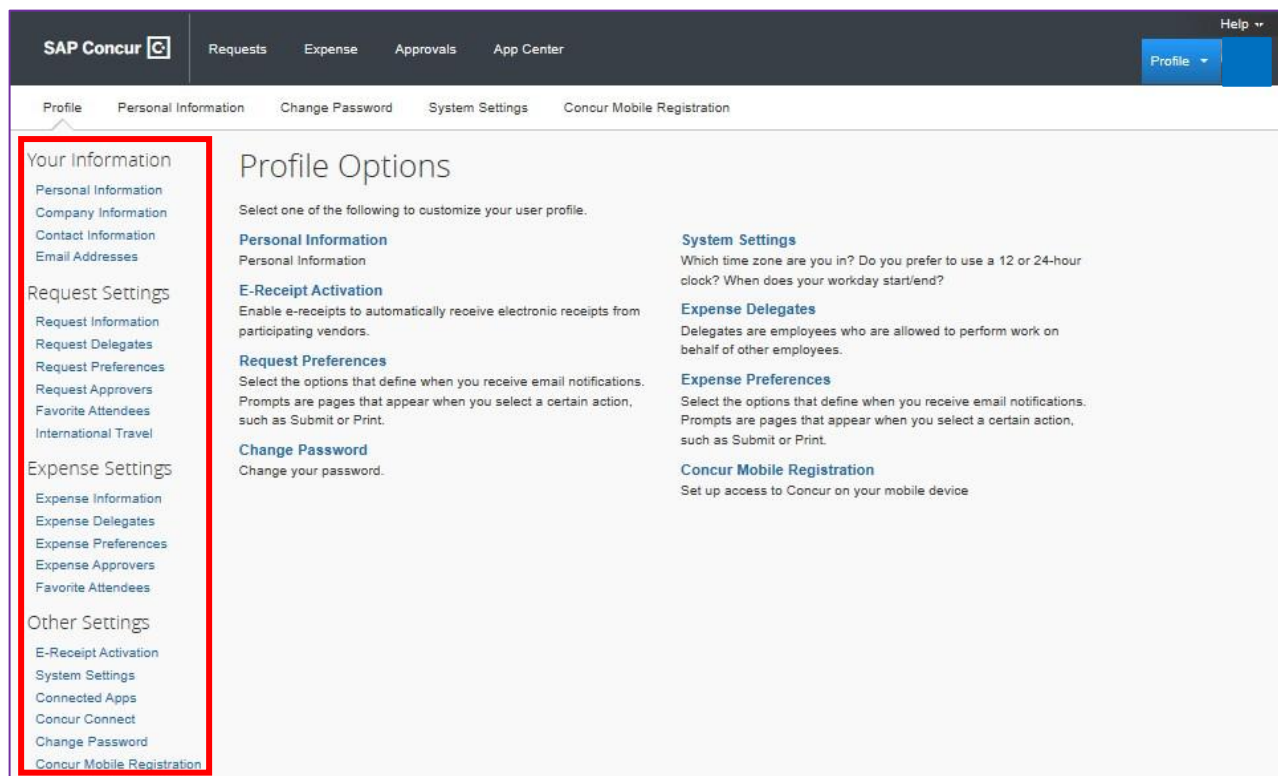
Every Concur user will have a user profile. This profile includes the user’s information, request settings, expense settings, as well as email notification, app, and other configurations.

The user profile can be reached by clicking “profile” in the top right of the home page after logging in.

The screenshot shows the SAP Concur home page. The top navigation bar includes 'Requests', 'Expense', 'Approvals', and 'App Center'. The 'Profile' dropdown menu is highlighted with a red box. Below the navigation bar, there is a dashboard with several widgets. The first widget shows 'Hello, [User Name]' with a blue square icon. To the right of this are six widgets: 'New' (00), 'Required Approvals' (00), 'Authorization Requests' (25), 'Available Expenses' (11), 'Open Reports' (00), and 'Cash Advances' (06). Below the dashboard, there is a section titled 'COMPANY NOTES' with a list of links: 'Washington DC - Travel Form', 'Use this link to access the Washington DC travel form. You will be required to attach this to your Trip request when travelling to Washington DC', 'Deployment Toolkit', 'You can access the deployment toolkit using this link', and 'Concur Training Toolkit'. A 'Read more' button is located at the bottom right of the 'COMPANY NOTES' section.

The following screen will display the various options and configurations available to the user.

The main sections and include Your Information, Request Settings, Expense Settings, and Other Settings.



Your Information

This section covers the personal, company, contact, and email information. The user also has the option to change their profile picture and adjust the various information listed such as:

- Employee ID
- Work and Home address
- Contact information
- Email addresses (also the ability to verify your email)
- Emergency contact
- Passport and Visa information
- All required information is marked as so

Travel Settings

The Travel Settings sections is an extension of the Personal Information section and includes all information needed for travel booking through Concur:

- Travel Preferences - all information needed for booking through Concur
- International Travel - such as passport and visa information
- Frequent Traveler Programs
- Assistants/Arrangers - Where users can go to assign a Travel Arranger

Request Settings

The request section covers information regarding travel request reports.

- Request information – contains the default FOAP for the user.
NOTE: Will display as FundXX-OrgXX-PXX for default Fund, Org, and Program
- Requests delegates allows a user to assign someone else to prepare requests, view receipts, receive emails, and approve reports (if applicable).
- Request preferences – Allows the user to choose when they receive emails regarding their request reports.

- Request approvers – Where the user can view their default approver (must be changes by the Admin).
- Favorite Attendees – This is an extremely useful tool for those who travel with groups of students or athletes.

This section allows a user to create groups to add to rosters. For example, if SFA Baseball were going to play games, it would be helpful to come here and create that roster for the current team so when the meals are added; the user can simply select this attendee list.

The screenshot shows the 'Favorite Attendees' section of a web application. On the left is a sidebar with a 'Request Settings' menu. The main content area has a header 'Favorite Attendees' and a sub-header 'Attendees'. Below this is a search bar with the text 'Find every attendee where' and dropdowns for 'Last Name' and 'Begins With'. A 'Go' button is to the right. Below the search bar are 'Edit' and 'Delete' buttons. A table lists attendees with columns for 'Attendee Name', 'Attendee Title', 'Institution/Company', and 'Attendee Type'. The table contains several rows, including 'Test, Processor', 'Test, Supervisor', 'Test, Traveler1', and 'Test, Traveler2'. Each row has a checkbox in the first column.

Expense Settings

The expense section, much like the previous section, covers information regarding travel reports.

- **Expense Information** - Contains the default FOAP for the user (must be changed by the Admin).
- **Expense Delegates** – Allows a user to assign someone else to prepare and view expense reports for them. Receiving emails and approving reports is also an option.
- **Expense Preferences** – Allows the user to choose when they receive email notifications regarding their expense reports.
- **Expense Approvers** – Where a user can view their default approvers (must be changed by the Admin).
- **Favorite Attendees** – This is just like the request portion and allows the same option to create favorite attendee lists.

Other Settings

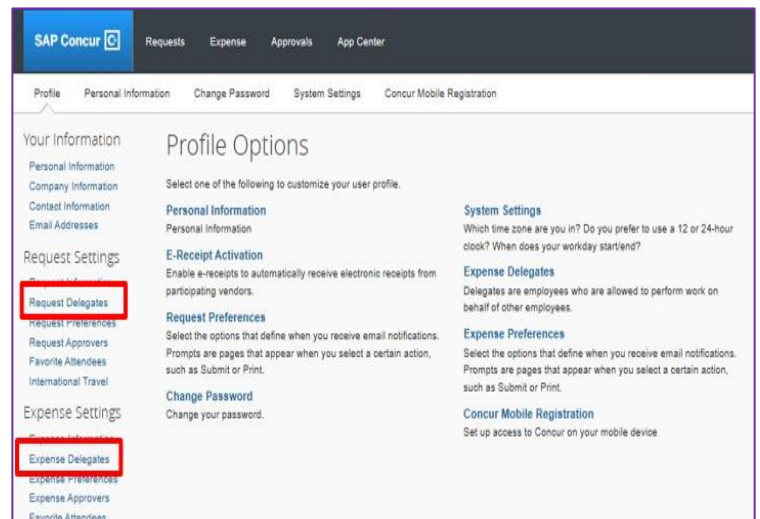
These settings are primarily concerned with receipts and connected applications.

- **E-Receipt Activation** – Ability to enable or disable e-receipt availability.
 - It is recommended for users to have e-receipt enabled.
- **System Settings** - Covers default languages, number formats, and currency symbols displayed as well as other date and time information.
- **Connected Apps** - Can be viewed and removed here.
- **Concur Mobile Registration** - When a traveler wants to start using the Concur app, they will register at the “Concur Mobile Registration” option at the bottom of the list.

Approvers and Delegates

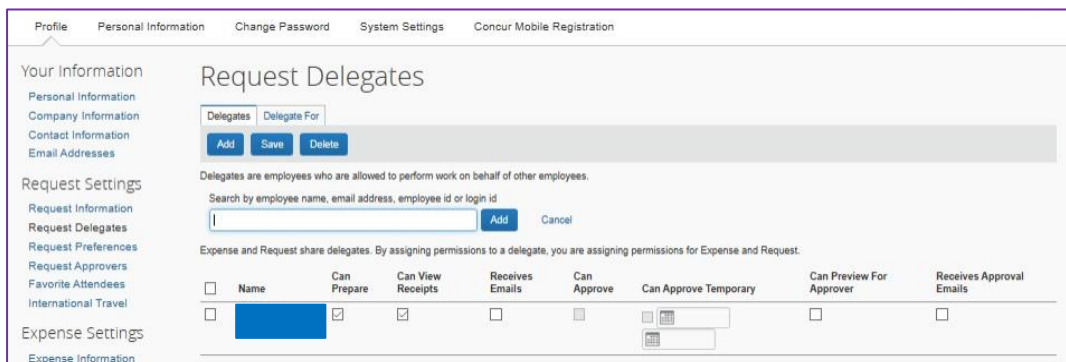
Concur users may want delegates to prepare travel for them. While it is good to have other employees designated as back-up travel preparers, Concur is a user-friendly software and reports can be completed easily. It is recommended that the individual traveler prepare their own travel.

However, if one would like to set up a delegate, they would go to their profile and click on Request Delegates and add the delegate there and then go to Expense Delegate and add them there as well. The user will have to add the delegate for request as well as expense to allow the delegate to create both requests and expenses. If a user only wanted to grant access to requests, then enable only in request.

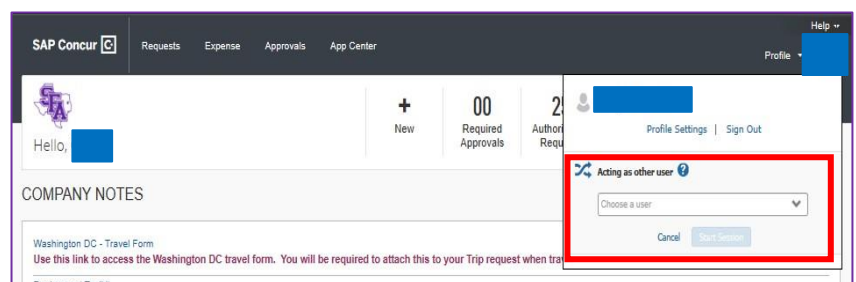


The process will be the same for both request and expense delegates. The user will see a list of delegates assigned and their permissions granted by the traveler or by the admin. To add a delegate, click on the blue “add” button and then search for the employee they wish to be a delegate. Once located, select the person and they will be added to the delegates listed.

Once they are on the list, the user must select their permissions to prepare requests, view receipts, receive emails regarding those requests, approve reports (if applicable), as well as access to preview an approval and receive approval emails. There is even an option to add dates to those approving permissions – a useful tool if the normal approver is out or unable to approve for a span of time.



Once the delegate is added for the user, the delegate can prepare reports and requests by logging in under their own sign-in, and going to the top right and clicking on the drop down next to “profile”. There are new options available that says “Acting as other user”. The delegate can then select the traveler who set them up and prepare reports for them.



Approvers can assign proxies to approve for them here too. They will go to Profile, then Profile Settings and find the same “Request Delegate” or “Report Delegate” section. The Approver will then search the name of the user they want to proxy and approve on their behalf. The access to be selected should be:

- “Can Approve” to grant access to approve indefinitely
- “Can Approve Temporary” to grant access to approve for a defined period
- “Can Preview For Approver” grants access for proxies to view requests and reports on behalf of the Approver and notify them when it is ready to approve
- “Receives Approval Emails” will allow proxies to receive the same email notifications to approve requests and reports the Approver receives

NOTE: If the individual does not appear on the search, they may not have the permissions in Concur to approve. Please contact the Travel Office to add those permissions.

Concur Mobile App

The Concur mobile app is a great way to prepare travel while out of the office. The app can perform a number of valuable tasks like create, submit, and approve request and expense reports. The app also allows users to upload and prepare receipts and expenses on the road. Providing a much more efficient way of keeping receipts and documentation.

If the user does not have the app or cannot get the app on their phone, they can always email those receipts to receipts@expenseit.com to upload and process receipts and expenses the same way.

Setup

To set up, the user will need to go to “Concur Mobile Registration” link in their profile.

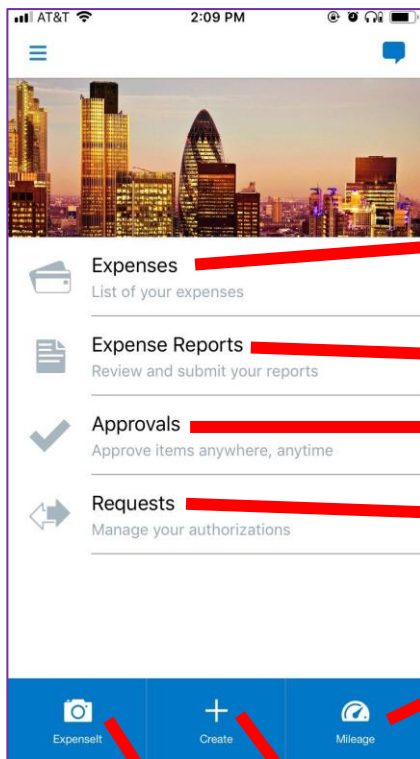
This will send a link to your email to download the app and get started.

Alternatively, the user can just download the app and log in like they would with the Concur website.



Navigation

Below is an example of the Concur Mobile homepage with brief explanations.



View, change, and assign expenses. These expenses include T-Card transaction as well as expenses created by uploaded receipts. If the user wanted to view and edit receipts, go here.

Create, view, change, and submit expense reports.

Review and approve items here (if applicable).

Create, view, change, and submit request reports.

Create a report for mileage calculated automatically within the app.

Capture receipts and create expense lines.

Create a travel expense.

Concur Profile Guide

Introduction

The Profile section within Concur offers numerous options, settings, preferences, and configurations that should be reviewed for accuracy by the traveler. This guide is meant for SFASU travel users and will cover the profile section, what it contains, and how to change the information including the following:

- Opening the Profile
- Personal Information
- Request Settings
- Expense Settings
- Default Account/ FOP Information
- Delegates and Approvers
- Activation Features
- System Settings

NOTE: Request reports and Expense reports have two separate sections. Settings made in the request side will only apply to the travel request (the report prior to the trip needed for approval to travel) and settings made in the expense side will only apply to the travel report (the report after the trip needed for reimbursement)

Finding the Profile Section

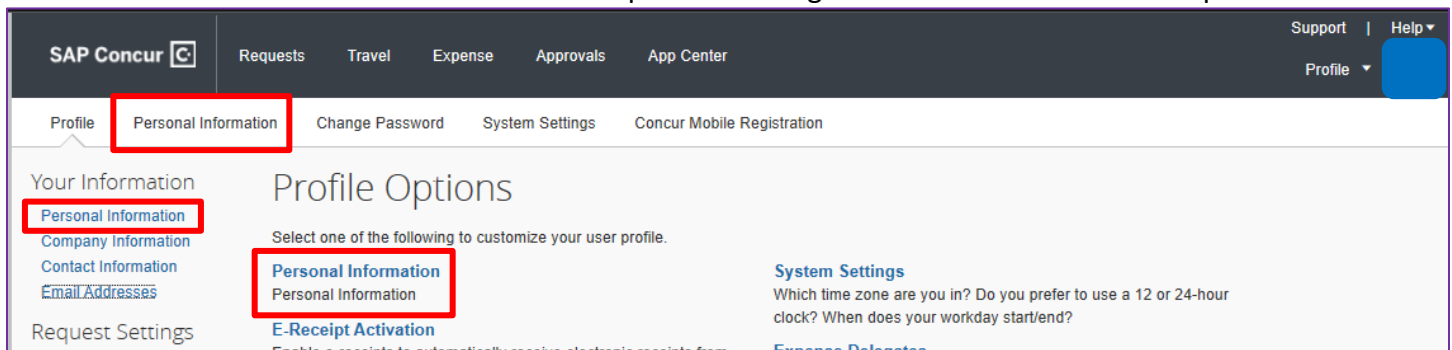
Once logged in, the user will see the Concur home page. The profile is in the top right corner of the home page.

Click the Profile drop down to see the options for Profile Settings, Signing out, and (if applicable) the option to prepare travel as a delegate for another user. Click on “Profile Settings” to get to the Profile Section.

The profile section will open to the “Profile Options” portion with important options listed below. A complete list of the profile configuration options are located on the left hand side.

Personal Information

The Personal Information section has several important settings that it is accessible in three places.

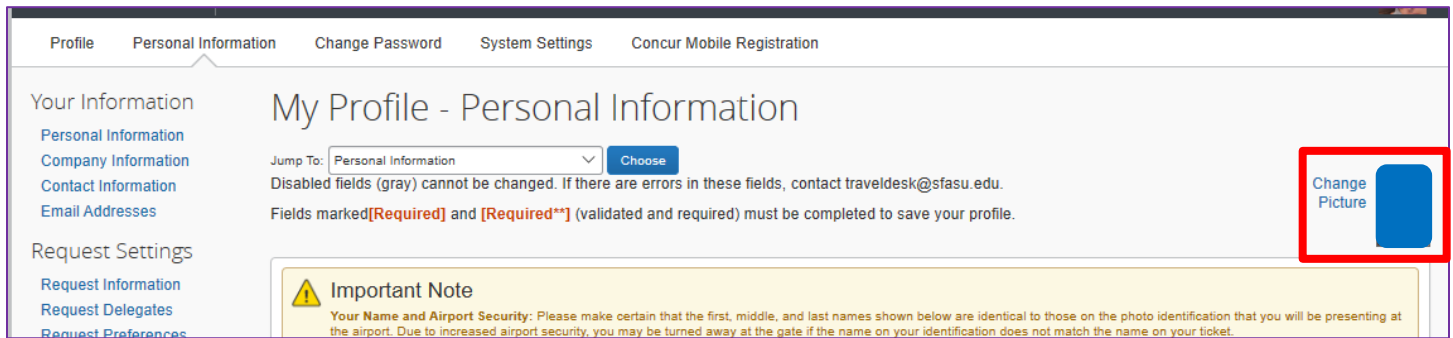


There is a lot of information here and it will be covered in the order it appears on the page. All required fields will be marked as so. Be sure to click save after each change .

Save

Profile Picture

The option to change the profile picture is one of the first options at the top right of the page. Click “Change Picture” to upload a picture.

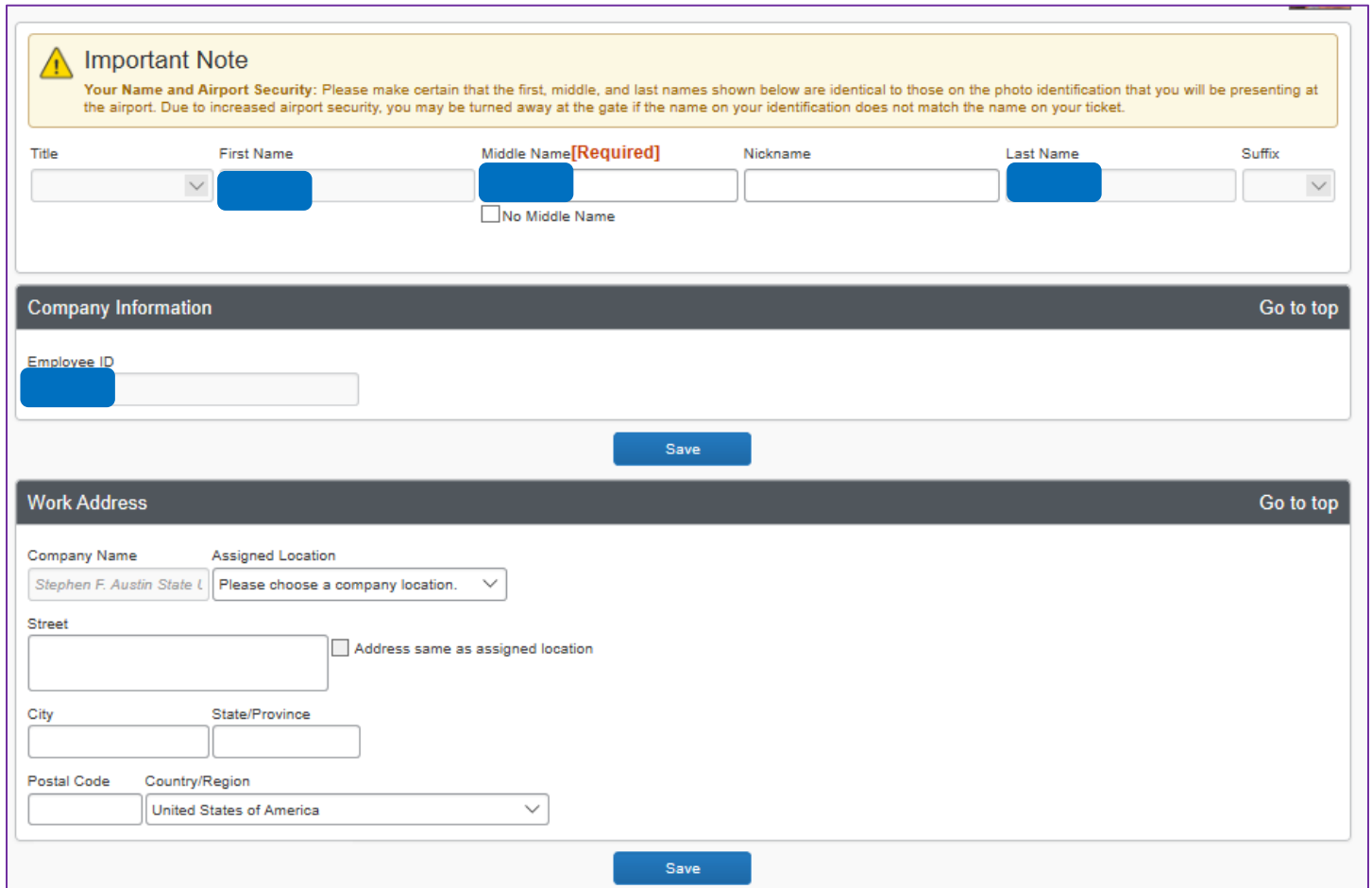


The screenshot shows the 'My Profile - Personal Information' page. At the top right, there is a blue button labeled 'Change Picture' which is highlighted with a red rectangular box. The page includes a navigation menu on the left with options like 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. Below the navigation menu, there are sections for 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses) and 'Request Settings' (Request Information, Request Delegates, Request Preferences). The main content area displays 'My Profile - Personal Information' with a 'Jump To:' dropdown set to 'Personal Information' and a 'Choose' button. A message states: 'Disabled fields (gray) cannot be changed. If there are errors in these fields, contact traveldesk@sfasu.edu. Fields marked [Required] and [Required**] (validated and required) must be completed to save your profile.' Below this is an 'Important Note' box with a warning icon and text about name and airport security.

The picture must be JPEG (.jpg) picture under 100kb in size. The dimensions should be 260 pixels wide by 320 pixels tall. Pictures can be changed to fit these specifications in programs like Paint.

At the top of this section, the user will find where their name, employee ID, work address, and home address. Some of these fields, such as first name, last name, and employee ID are not editable. If there is a mistake in these fields, please contact the Travel Office.

Feel free to complete the middle name, nickname, work address, or home address – but it is not required.



This screenshot shows the lower portion of the 'My Profile - Personal Information' page. It begins with the same 'Important Note' box regarding name and airport security. Below this is the 'Personal Information' section with input fields for Title, First Name, Middle Name (marked as [Required]), Nickname, Last Name, and Suffix. There is a checkbox for 'No Middle Name'. The 'Company Information' section follows, featuring an 'Employee ID' field and a 'Go to top' link. A 'Save' button is located below the company information. The 'Work Address' section includes fields for Company Name, Assigned Location, Street, City, State/Province, Postal Code, and Country/Region (set to 'United States of America'). It also has a checkbox for 'Address same as assigned location' and another 'Go to top' link. A final 'Save' button is at the bottom of the work address section.

Contact Information

In the contact information, users can enter work phone, extension, fax, pager, and other phone numbers but will only be required to enter either the work or home phone.

NOTE: Work Phone should be a number that you have access to whilst traveling.
CTP recommends putting your mobile phone number here.

Contact Information

Go to top

Please note that you only need either a Work or Home phone number required in your profile.

Work Phone[Required**]

9364682462

Work Extension

9364682462

Work Fax

2nd Work Phone/Remote Office

9364682462

Home Phone[Required**]

Pager

Other Phone

9364682462

Mobile Phone Country/Region

United States of America (+1)

Mobile Phone

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

Save

Immediately below that, the user can enter their email address. It is important to add at least one email address and verify is to receive important notifications regarding one’s travel requests and reports.

Click on “add an email address” and enter the user’s email address. Also, verify the email address to enable notifications, Expenselt, and other features.

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		Verified	Disable Verification	Yes	

Other Options

Beneath the contact sections, you will find the Emergency Contact section, which is an optional portion where the traveler can include emergency contacts.

The rest of the options are Travel Preferences that can be used by Corporate Travel Planners (CTP) when booking for the traveler. They include Air, Hotel, and Car Rental Preferences; Frequent travel and advantage programs; and passport/visa information.

The last two portions allows a user to assign an assistant to work in lieu of the traveler and add a credit card to their profile.

Request Settings

The Request Settings are found on the left-hand side of the settings. Request settings only deals with the request-side of travel. Meaning, to change a preference or setting for all of Concur, it is important to make that change in the Request Settings and Expense Settings section.

This guide will cover the options in the order they are listed.

Request Settings

- [Request Information](#)
- [Request Delegates](#)
- [Request Preferences](#)
- [Request Approvers](#)
- [Favorite Attendees](#)
- [International Travel](#)

Request Information/ Default FOP

The first section will contain a default FOP. This is normal and a universal configuration. The user will allocate expenses to the appropriate FOAP on the travel Requests or change the FOAP here on the Request Information section.

NOTE: By changing the default FOAP in the profile, all future requests and reports will include that FOAP on the header and expense lines.

The screenshot shows the 'Request Information' form. It has a header with 'Save' and 'Cancel' buttons. Below the header, there are four input fields: 'User Group' (Test User), 'Reimbursement Currency' (US, Dollar), 'Fund' ((FundXX) Concur Default), and 'Org' ((OrgXX) Concur Default). There is also a 'Program' field with the value ((PXX) Concur Default).

Request Delegates

This portion allows the user to view who has delegate abilities for them, who they are delegates for, and add/delete assigned delegates or their delegate privileges for others. Users can only add delegates to have someone else work as them, but can only view and delete whom they are a delegate for.

Again, this would only add a delegate for the request portion of travel. Delegates still need to be added in the expense section to have delegates in expense as well.

Click “Add” to begin adding a delegate then “Save” to save the information. The delegates and their permissions are listed below that.

The screenshot shows the 'Request Delegates' form. It has a header with 'Delegates' and 'Delegate For' tabs, and 'Add', 'Save', and 'Delete' buttons. Below the header, there is a text box explaining that delegates are employees who are allowed to perform work on behalf of other employees. Below this, there is a table with columns: Name, Can Prepare, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The table is currently empty, and a message 'No records found.' is displayed at the bottom.

Request Preferences

This portion allows users to select when they want Request-related emails and notifications. Check the box by which emails and notifications the user wants and click “Save”.

The screenshot shows the 'Request Preferences' form. It has a header with 'Save' and 'Cancel' buttons. Below the header, there is a text box explaining that prompts are pages that appear when you select a certain action, such as Submit or Print. Below this, there is a section titled 'Send email when...' with two checkboxes: 'The status of a request changes' and 'A request is submitted for approval'. There is also a section titled 'Prompt...' with a checkbox: 'For an approver when a request is submitted'.

Request Approvers

This page allows a user to view who their request approver is. This cannot be changed by the user – Please contact the Travel Office if you have any questions.

Request Approvers

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

Default approver for your Requests

approver@sfasu.edu - Supervisor Test

Favorite Attendees

When travelling with groups or teams, a traveler may have group meals or group expenses. Rather than adding these attendees one-by-one in the report each time, users can create group lists here to be used when making the request or report.

- The first tab “Attendees” will include all the attendees already added. The user can search for, delete, or edit attendees.
- The second tab “Attendee Groups” allows the user to create a group and add attendees. Click “Attendee Groups” then “Add New” to begin. Add a group name and click “Save Group”.

Favorite Attendees

[Attendees](#) [Attendee Groups](#)

Find every attendee where: Last Name Begins With [Go](#)

[Edit](#) [Delete](#)

<input type="checkbox"/>	Attendee Name ▲	Attendee Title	Institution/Company
--------------------------	-----------------	----------------	---------------------

No Attendees Found

Favorite Attendees

[Attendees](#) [Attendee Groups](#)

Find every attendee where: Last Name Begins With [Go](#)

Group Name [Save Group](#) [Cancel](#)

<input type="checkbox"/>	Attendee Name ▲	Attendee Title	Institution/Company	Attendee Type
--------------------------	-----------------	----------------	---------------------	---------------

No Attendees Found

International Travel

The last portion “International Travel” will bring the user back to the “Personal Information” section where you can enter passport or visa information. This information is not required.

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](#)

International Visas

[+ Add a Visa](#)

Travel Settings

The Travel Settings sections is an extension of the Personal Information section. This section covers everything needed for travel booking through Concur and includes:

- **Travel Preferences** - All information needed for booking through Concur.
- **International Travel** - Such as passport and visa information.
- **Frequent Traveler Programs.**
- **Assistants/Arrangers** - Where users can go to assign a Travel Arranger.

Expense Settings

The expense list is found on the left-hand side of the profile listed beneath the personal information and request settings. It will include the same settings and configurations as the previous Request Portion, but for the Expense side.

Settings made in the request side will only apply to the travel request (the report prior to the trip needed for approval to travel and fund encumbering) and settings made in the expense side will only apply to the travel report (the report after the trip needed for reimbursement).

Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees

Expense Information

The first option will display the traveler's default FOP for expense reports. The default FOAP cannot be changed by the traveler - Please contact the Travel Office if there are any questions.

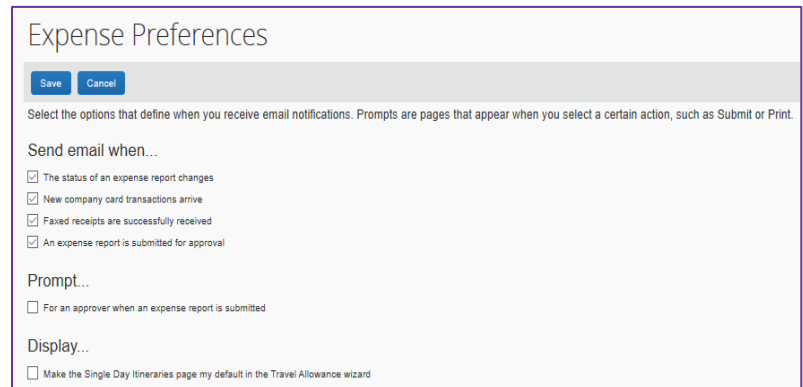
Expense Delegates

The following option allows users to add delegates to act on their behalf in the expense portion of the travel process. The second tab allows a user to see who they have delegate privileges for and delete those privileges if needed.

To add a delegate, the user will click add and find the delegate they wish to add then click add. The privileges will be listed alongside that delegates name in the list below

Expense Preferences

This portion allows the user to add or remove emails and notifications relating to expense reports. The change the preferences, the user will simple check or uncheck the box they want to change and click save at the top.



Expense Preferences

Save Cancel

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.

Send email when...

- ☒ The status of an expense report changes
- ☒ New company card transactions arrive
- ☒ Faxed receipts are successfully received
- ☒ An expense report is submitted for approval

Prompt...

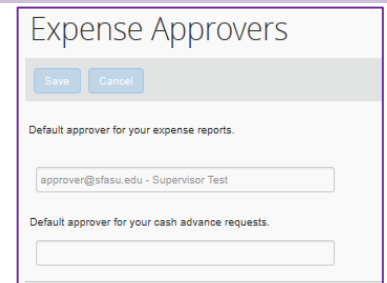
- ☐ For an approver when an expense report is submitted

Display...

- ☐ Make the Single Day Itineraries page my default in the Travel Allowance wizard

Expense Approvers

The Approvers section shows the default approvers for the travelers expense reports and cash advances (if applicable). These fields are not editable by the user. Please contact the Travel Office with any questions.



Expense Approvers

Save Cancel

Default approver for your expense reports.

approver@stasu.edu - Supervisor Test

Default approver for your cash advance requests.

Favorite Attendees

When travelling with groups or teams, a traveler may have group meals or group expenses. Rather than adding these attendees one-by-one in the report, users can create lists here to be used when making the request or report.

- The first tab "Attendees" will include all the attendees already added. The user can search for, delete, or

edit attendees.

- The second tab “Attendee Groups” allows the user to create a group and add attendees. Click “Attendee Groups” then “Add New” to begin. Add a group name and click “Save Group”.

The left screenshot shows the 'Favorite Attendees' page with the 'Attendees' tab selected. It includes search filters for 'Last Name' and 'Begins With', a 'Go' button, and a table with columns: Attendee Name, Attendee Title, Institution/Company, and Attendee Type. The right screenshot shows the same page with the 'Attendee Groups' tab selected. It includes a 'Group Name' field, a 'Save Group' button, and a 'Cancel' button. Below the input fields is a table with the same columns as the left screenshot.

Other Settings

The last portion of the Profile Settings is “Other Settings” and is at the bottom of the list on the left-hand side of the profile section.

The 'Other Settings' menu is displayed with the following links: E-Receipt Activation, System Settings, Connected Apps, Concur Connect, Change Password, and Concur Mobile Registration.

E-Receipt Activation

This section allows a user to setup the E-Receipt feature in Concur. This important feature allows a user to email receipts into Concur making for easier receipt handling. It is highly recommended this be activated. Once activated the page will note that it is activated and offer an option to disable this setting.

E-Receipt Activation

You previously enabled Concur to obtain e-receipts for you with certain participating suppliers, but you may disable this functionality at any time. If you disable this setting, Concur will no longer request e-receipts from such suppliers. Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator.

If you wish to disable this setting, click [here](#).

System Settings

The System settings allows a user to change the language, number formats, dates, times, and other specific configurations. A user can change these at any time or reset to the default settings in this area.

The 'System Settings' page is divided into two main sections: 'Regional Settings and Language' and 'Calendar Settings'. The 'Regional Settings and Language' section includes fields for Default Language (English (United States)), Number Format (1,000.00), Placement of Currency Symbol (Before the amount), Negative Number Format (-100), Negative Currency Format (-100), Date Format (mm/dd/yyyy), Time Format (h:mm AM/PM), Hour/Minute Separator (:), and Time zone (local time) (UTC-05:00 Eastern Time (US & Canada)). The 'Calendar Settings' section includes fields for Start week on (Sunday), Start Day View At (08:00 am), End Day View At (08:00 pm), and Default View (month). There is also an 'Other Preferences' section with a field for Rows per page (25). At the bottom are 'Save', 'Reset', and 'Cancel' buttons.

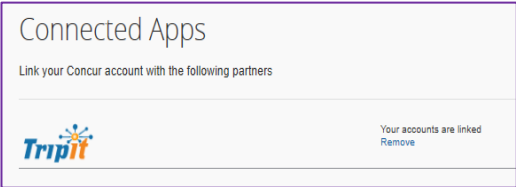
Connected Apps

Apps can be views, added, or deleted in the App Center tab at the very top of the Concur page. These apps are primarily 3rd party connections that allow convenient services between the 3rd party and Concur. A user can browse the offered apps by going to the “App Center” tab at the very top.

The 'App Center' tab is highlighted in the Concur navigation bar. Below the navigation bar, the 'App Center' page is displayed with a 'Category' dropdown set to 'All Apps' and a section for 'Popular Connections'. A message at the bottom says 'Do more with your favorite apps and services by linking them to Concur'.

If there are any vendors you use frequently, you may want to connect with Concur in this section.

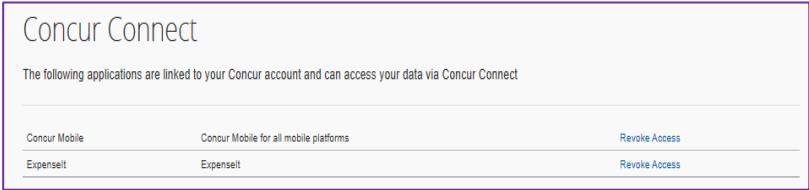
In the Connected Apps Section of the Other Settings, users can view and remove these apps



Concur Connect

This link will show a user what applications have access to your Concur account.

Concur Mobile and Expenselt are highly useful Concur features and it is recommended that these application’s access remain.



Concur Mobile allows the Mobile App to submit reports to Concur and the Expenselt feature reads receipts uploaded, emailed, or loaded into Concur and created expense lines for them. If you have any questions about these features, please contact the Travel Office.

Concur Mobile Registration

This is a one-time registration to set up the Concur Mobile App. Enter in your email (the work email you will be using for travel) and click “get started” to send a link to the app to your phone. Alternatively, if the app was already downloaded, sign in using your SFA email address and click “Company Code Sign in” to sign in.

Or, sign in with your SFA email and enter your mobile PIN. The PIN is set in this section.

