

CONCUR QUICK GUIDE: USER PROFILE SETTINGS

GETTING STARTED

Log in to [Concur](#) (available via myCI as CSUCI Travel)
You will be taken to the Concur home page

SETTING UP YOUR PROFILE

From the Concur homepage, click **Profile**, then **Profile Settings**.
Complete the following Information:

YOUR INFORMATION

Personal Information

Name *Required*

1. First and Last Name will be populated from your University HR record. Please verify that all components are correct and match your government issued ID.

Note: If name information is incorrect contact Human Resources to update your official record.

Address *Optional*

Contact Information *Required*

1. Enter a work and/or home phone number
2. Add Your Mobile Device *Required*
Registering your mobile device will allow you to receive text messages from Concur informing you of any cancelled or delayed airline flights in addition to informing you of potential risks in your travel area.
 - a) Select the correct country code from the dropdown
 - b) Enter your mobile number
 - c) Click **Save**

Verify Your Email Address **IMPORTANT!**

Your "@csuci.edu" email address has already been populated in your profile. Verifying your email address allows you to:

- Email your receipts to receipts@concur.com
- Forward travel plans to plans@tripit.com

Only works if you have TripIt account.

1. Click the "**Verify**" link
2. A code will be sent from Concur to your @csuci.edu email address, copy the code from the email message
3. Return to your profile, paste the code you received into the **Enter Code** box, then click **OK**

Emergency Contact

1. Enter the contact information for your emergency contact
2. If your emergency contact's address is different from your own, **uncheck** "Address same as employee"

Travel Preference *Optional, but recommended for frequent travelers*

1. Enter air, hotel, and car rental preferences
2. If you participate in Frequent Traveler Programs, click **Add a Program**

TSA Secure Flight

1. Select Gender and Date of Birth
2. If you have a TSA Pre-check number, it can be entered

International Travel: Passports and Visas *Recommended for International Travelers*

1. Entering passport and visa information in Profile, allows it to be available when booking travel
2. Enter passport/visa information and click **Save**

Assistants and Travel Arrangers (Travel Coordinators)

Add an assistant as applicable. This person will be able to book travel (make arrangements) on your behalf, under their own profile, once they have been added to your profile.

Individual Concur Travel Credit Cards

1. Enter the form of payment that will be used to satisfy bookings in Concur. Complete all required fields
2. If you have a corporate travel card, you must use this card for travel expenses excluding airfare and car rental.

REQUEST SETTINGS

1. Delegates are shared between **Request** and **Expense Settings**
2. Start with **Request Settings** and the info will carry through to **Expense Settings** - If changes are made to one section, the other section will automatically update

Request Information

1. A default departmental account number will automatically populate. Values only change if changes occur in the employee's CHRS record.

Request Delegates

NOTE: Request and Expense delegates can prepare but cannot submit reports on behalf of the traveler. **It is the responsibility of the traveler to add/delete delegates and submit reports.**

1. Click **Add**, then begin typing the individual's name and select their record from the dropdown list
2. Check off the functions you would like your expense delegate to perform on your behalf (typically this includes prepare, book travel, view receipts, receive emails)
3. Click **Save**

Request Preferences – no setup necessary but you can alter your notification preferences

Request Approver

1. Your default approver will automatically display and cannot be altered. Values only change if changes occur in the employee's CHRS record and Delegation of Authority (DOA) Module in CI Financials.

Favorite Attendees *Optional*

1. Frequent attendees of Group Business Meals can be setup in the system ahead of time
2. Click New Attendee, enter required info, click **Save**

OTHER SETTINGS

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E-Receipt Activation *Highly Recommended*

Enables the auto collection of electronic receipts into the Concur application, from participating suppliers.

1. Click **E-Receipt Activation** link
2. Accept E-Receipt Activation and Use Agreement
3. You will receive a confirmation that E-Receipts has been activated

System Settings - Skip

Connected Apps *Highly Recommended*

Triplt Pro

1. Locate **Triplt** eligibility message on Concur home page, under Alerts
2. Click **Get It** link
3. Enter your @csuci.edu email address, and a password, and click **Sign Up**
4. **Triplt** will send a verification email to your @csuci.edu email address. Click the link in the email to verify the account.

Mobile Registration

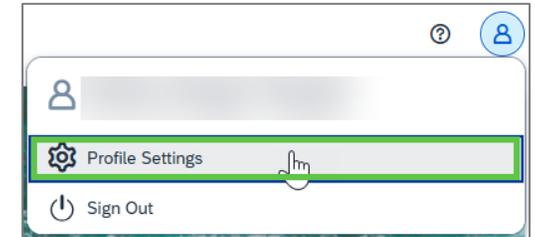
1. Setup the traveler's mobile phone to capture receipts, submit expense reports, etc.
2. Download the Concur application to the traveler's phone, using the provided link, or by going to the App Store on the

traveler's phone to Login to Concur via the phone, using the traveler's @csuci.edu email and password

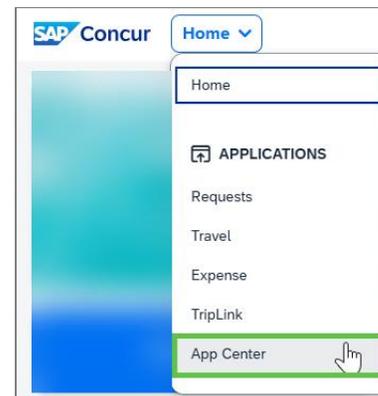
3. Click **OK**, to allow Concur to send notifications

Your Concur Profile Setup is Complete!

Where to find your Concur Profile to fix all these settings.



Where to find, download, and create app accounts that work with Concur (e.g., Triplt).



QUESTIONS? CONTACT: Travel@csuci.edu