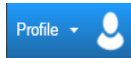# SAP Concur ⦿ User Profile Setup

Accessing Concur

Users will access Concur through mySacState by navigating to the Employee Tab and clicking on the Concur link.

Concur Travel Profile

Prior to using Concur Travel to reserve travel, you MUST REVIEW and UPDATE your Travel Profile.

1. Click **Profile**, and then **Profile Settings**.

2. Click **Personal Information**.

   Update any fields that do not match your photo identification.

   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.

3. Verify your **Work and Home Addresses** and your **Contact Information**.

   You must input either a work or home phone number as well as a mobile phone.

4. Update and verify your **email address**.

   To verify an email address: [+] Add an email address

   a. Add and save your email address.
   b. Once you have saved an email address, click the "Verify" link.
   c. Check your email for a verification message from Concur.
   d. Copy the code from the email message into the "Enter Code" box next to the email address.
   e. Click "OK" to submit the code and complete verification.

   Make sure to add and verify all email addresses that will be used to submit receipts.

   Email addresses may only be associated with one user profile.

5. Complete the **Emergency Contact** fields, as needed.

6. In the **Travel Preferences** section, you can select your discount travel rates/fare classes, specify Air, Hotel, and Car Rental Preferences, and add Frequent-Traveler Programs.

To add a Frequent-Traveler, Driver, and Hotel Guest Program: [+] Add a Program

   a. Click the **Add a Program** link to enter up to five memberships at a time.
   b. Use the Radio buttons to select if this is an Air/Rail Carrier, Car Rental Company, or Hotel.
   c. Select the appropriate vendor from the dropdown list, and enter the Frequent Traveler/Driver/Guest Number. Make sure that the information for the membership matches the name in your profile, including middle initial.
   d. **Enter programs exactly as they appear on your card, excluding spaces and dashes.** Do not add any additional characters, or the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system.
   e. Use the Search this Vendor check box to prioritize the search in Travel. Keep in mind that the University's travel policy will usually override your individual vendor preferences.
   f. Continue adding your Frequent-Traveler Programs, as needed, and then click Save.

7. In the **TSA Secure Flight** section, verify the required Gender and Date of Birth fields. Complete the DHS Redress No. and TSA Precheck Known Traveler Number fields, as needed. **Your gender and birth date are required fields.**

8. In the **Assistants and Travel Arrangers** section, you can assign an assistant/arranger to view and modify your profile or to book travel and trips on your behalf. Each traveler can have one primary assistant.

9. In the **Credit Cards** section, add or update your Individual Concur Travel Card information that you use to book travel. *A campus wide Corporate Ghost card is on file for booking airfare.* **An Individual Corporate Travel Card should be added to Concur for hotel reservations.** No personal credit cards should added.

   To add a new card:
   a. Click **Add a Credit Card**. The **Add a Credit Card** window appears.
   b. Concur recommends you set a credit card as the default for hotel and car travel. Air will be billed on the Concur Ghost Card. This way, the system will not prompt you to choose a credit card.
   c. Make sure that the name on the credit card, the credit card number, the expiration date, and the billing address are all correct and current.
   d. In the **Add a Credit Card** window, click **Save**.

10. Once you have completed your **Travel Profile** updates, click **Save**.

Optional Profile Settings

Personal Car

In order to claim mileage on an expense report, the user must have a car associated with their profile.

1. Click **Profile**, and then **Profile Settings**.

2. Click **Personal Car**.

3. Click **New**.

4. Enter the type of mileage in the **Mileage Rate Type** field. This will either be Personal or Athletics.

5. Use the choice list to choose the **Vehicle Type**. For users calculating mileage for employee travel, select "Personal Car."

6. If you'd like to make this the default car used when calculating mileage, check **Preferred Car**.

7. Click **Save.**

Setting Up A Delegate

Concur allows the user to setup a delegate who will be able to prepare Travel Requests and Expense Reports on your behalf. This does not remove the user's responsibility to review and submit the request or report.

Approvers may set up a delegate to assist with their duties.

1. Click **Profile**, and then **Profile Settings**.

2. Click the **Delegates** section for the module you want to work with. (Ex. Expense Delegates or Request Delegates). By assigning permissions to a delegate, you are assigning permissions for both Expense and Request.

3. Click **Add**.

4. Use the search box to find the delegate and click **Add.**

5. Use the check boxes to assign permissions to the delegate.

6. Click **Save.**

Setting Up A Travel Arranger

Concur allows the user to setup a Travel Arranger who will be able to make travel reservations on your behalf.

1. Click **Profile**, and then **Profile Settings**.

2. From the Travel Settings section, click **Assistants/Arrangers**

3. Click **Add an Assistant**.   [+] Add an Assistant

4. Use the search box to find the assistant, and then use the check boxes to assign permissions to the assistant.

5. Click **Save.**

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Need More Help?

Email us at travel@humboldt.edu

or visit us on the web at https://procurement.humboldt.edu/travel