Laredo College

SAP Concur Travel:
Employee Account Set-up

GETTING STARTED IN LAREDO COLLEGE SAP CONCUR TRAVEL

All travel requires approval, even if travel expenses are paid by a third-party vendor. Employees should complete and submit an expense report within 15 days after returning from their travel.

I. Login Process

We begin by going to the SAP Concur Travel login site which is located at www.concursolutions.com. You will be able to login Concur with your work e-mail address and a temporary password provided by the Accounting Department. You will need to change your temporary password to your own preferred password.
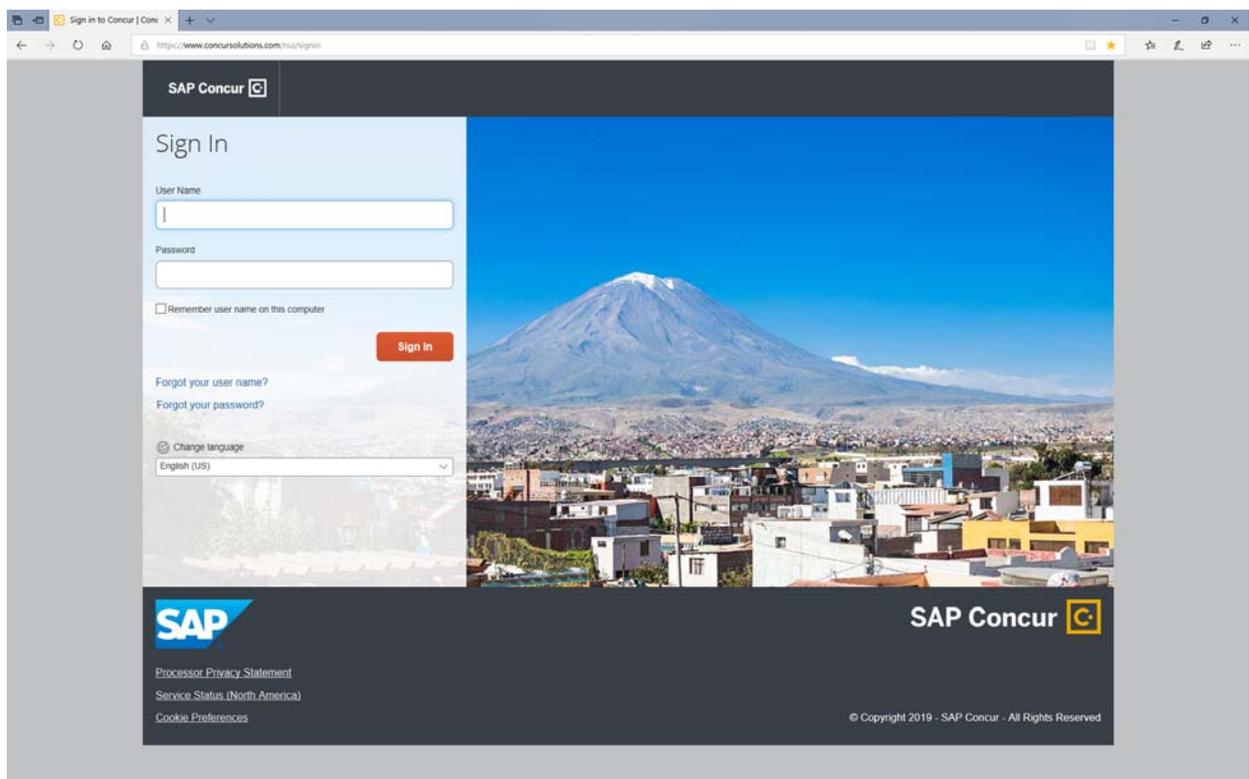
Note: Send an email to accounting2@laredo.edu if you are having difficulty logging into your concur employee account.

❖ *Once you are logged in, click on Profile in the upper-right hand corner.*
❖ *Click on Profile settings to change password, and Change Password option.*

See example below:
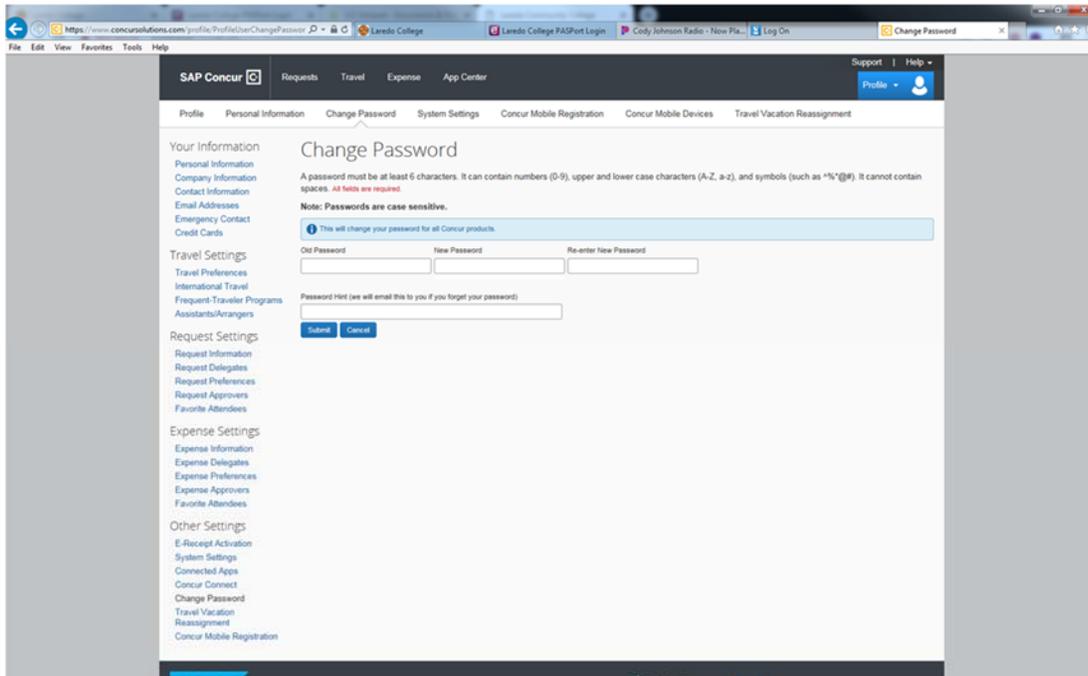
II. Concur User Profile
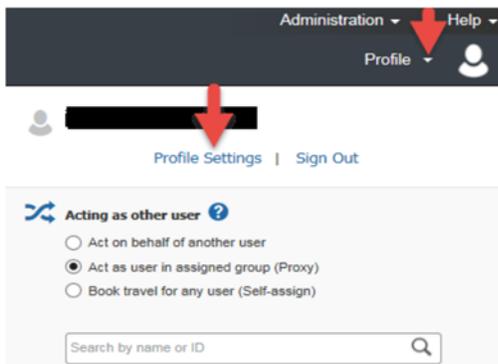
Prior to using Concur Travel to reserve travel, you must Review and Update your Travel Profile.

We will start with Personal Information. Please note: Disabled fields in gray cannot be changed. If there are errors in these fields, please contact the Concur Admin Staff at (956)721-5121.

- ❖ *Click on **Profile**, and then **Profile Settings**.*
- ❖ *Click on **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.*
- ❖ *Verify your **Company Information** such as your supervisor's name.*
- ❖ *Verify your work and home addresses and your **Contact Information**. You must input either a work or a home phone number as a well as a mobile phone number.*
- ❖ *Update and verify your **Email Address**. Your work email will automatically populate, but you can add a personal email where your itinerary will be email.*
  - ➢ *To verify an email address:*
    - • *Add and save your email address*
    - • *Once you have saved an email address, click the verify link.*
    - • *Check your email for a verification message from Concur.*
    - • *Copy the code from the email message into the "Enter Code" box next to the email address.*
    - • *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 address may only be associated with one user profile.*
- ❖ *Complete the **Emergency Contact** fields as needed.*
- ❖ *In the **Travel Preferences** section, you can select your discount travel rates, specify air, hotel and/or car rental preferences (non-smoking room & aisle/window seat) and add frequent traveler programs.*
  - ➢ *To add a frequent-traveler, driver and/or hotel guest program:*

- *Click the Add a Program link to enter up to 5 memberships at a time.*
- *Use the Radio buttons to select if this is an Air/Rail Carrier, Car Rental Company and/or Hotel.*
- *Select the appropriate vendor form 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.*
- *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.*
- *Use the Search this Vendor check box to prioritize the search in Travel. Keep in mind that the College's travel policy will usually override your individual preferences.*
- *Continue adding your Frequent-Traveler Programs and then click "Save".*

❖ *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. Your gender and birth date are required fields. If you decide to participate in this TSA Pre Check Program, please note that this is a non-reimbursable expense.*

❖ *In the __Assistants and Travel Arrangers__ section, you can assign an assistant/arranger to view and modify your profile and/or book travel trips on your behalf. Each traveler can have a primary assistant. Your assistant must have an existing Concur account before you can add them to your profile.*

❖ *On the __Credit Cards__ section, add and/or update your College P-Card information that you will use to book your travel. You must have a credit card saved here in order to reserve flights.*

❖ *Once you have completed your Travel Profile updates, click the Save button.*

III. Optional Profile Settings

We will be reviewing additional settings in your SAP Concur Travel Profile for important information under Profile Settings.
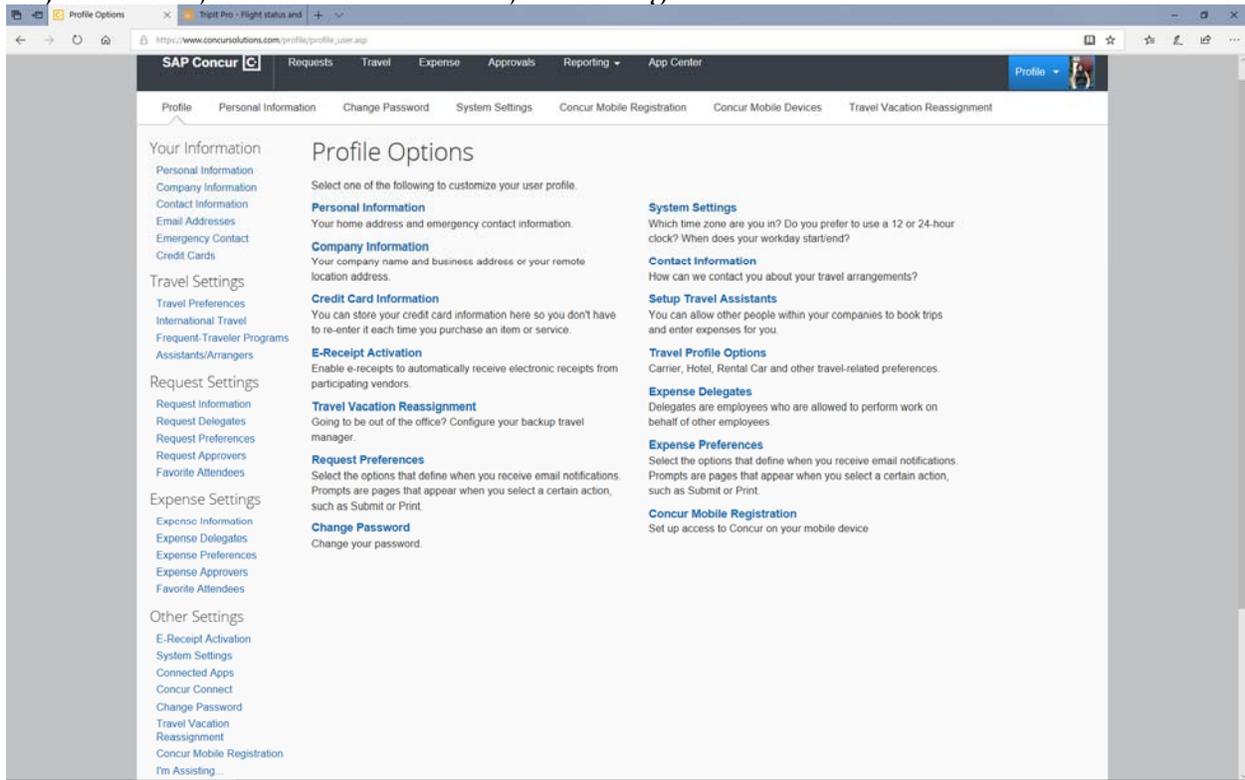
- ❖ **Personal Car**
  - ➢ *In order to claim mileage on an expense report, the user must have a car associated with their profile.*
    - *Click Profile and then Profile Settings.*
    - *Click Personal Car.*
    - *Click "New"*
    - *Enter a name for the vehicle in the Vehicle ID field. This is simply an identifier to differentiate the car in the list.*
    - *Use the choice list to choose the Vehicle Type. For users calculating mileage for employee travel, select "Regular Mileage".*
    - *If you would like to make this the default car used when calculating mileage, check Preferred Car and Click Save.*
- ❖ **Default FOAP**

- *Concur allows the user to setup a default FOAP (Department Account) to be pre-populated for Travel Requests and Expense Reports. The setup for each module is separate from the others to allow different FOAPs to be used.*
  - *Click Profile and then Profile Settings.*
  - *Click the information section for the module you want to work with such as Request and/or Expense information.*
  - *Use the choice list to select the Chart, Fund, Organization and Program.*
  - *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 and/or report.*
    - *Click on Profile and then Profile Settings.*
    - *Click the Delegates section for the module you want to work with such as Request and/or Expense Delegates.*
    - *Click Add.*
    - *Use the search box to find the delegate and click Add.*
    - *Use the check boxes to assign permissions to the delegate.*
    - *Click Save.*

If you have any questions and/or need additional assistance, please contact the Concur Travel Admin Staff for Laredo College at (956)721-5121.

Concur Admin Staff: Miguel Rangel and Sonia Mireles