



Essential Tips & Tricks to Master Concur

Concur App Basics

CSUF

**Academic
Financial Services**
ADMINISTRATION AND FINANCE

Presented By: Bonnie Li Victorino
Joseph Vu & Aundrea Hyde
Jessica Croom



Agenda



1

Download the Concur App

2

Connect Uber and Lyft

3

Download and add Triplt

4

Create + Submit + Approve in App

5

Uploading Pictures and Receipts

6

Sign up for Direct Deposit

1

Download the Concur App

SAP Concur

Why the Concur App is Useful

Download on the
App Store

GET IT ON
Google Play



Saves time and
reduces stress.

Everything can be
done on the GO.



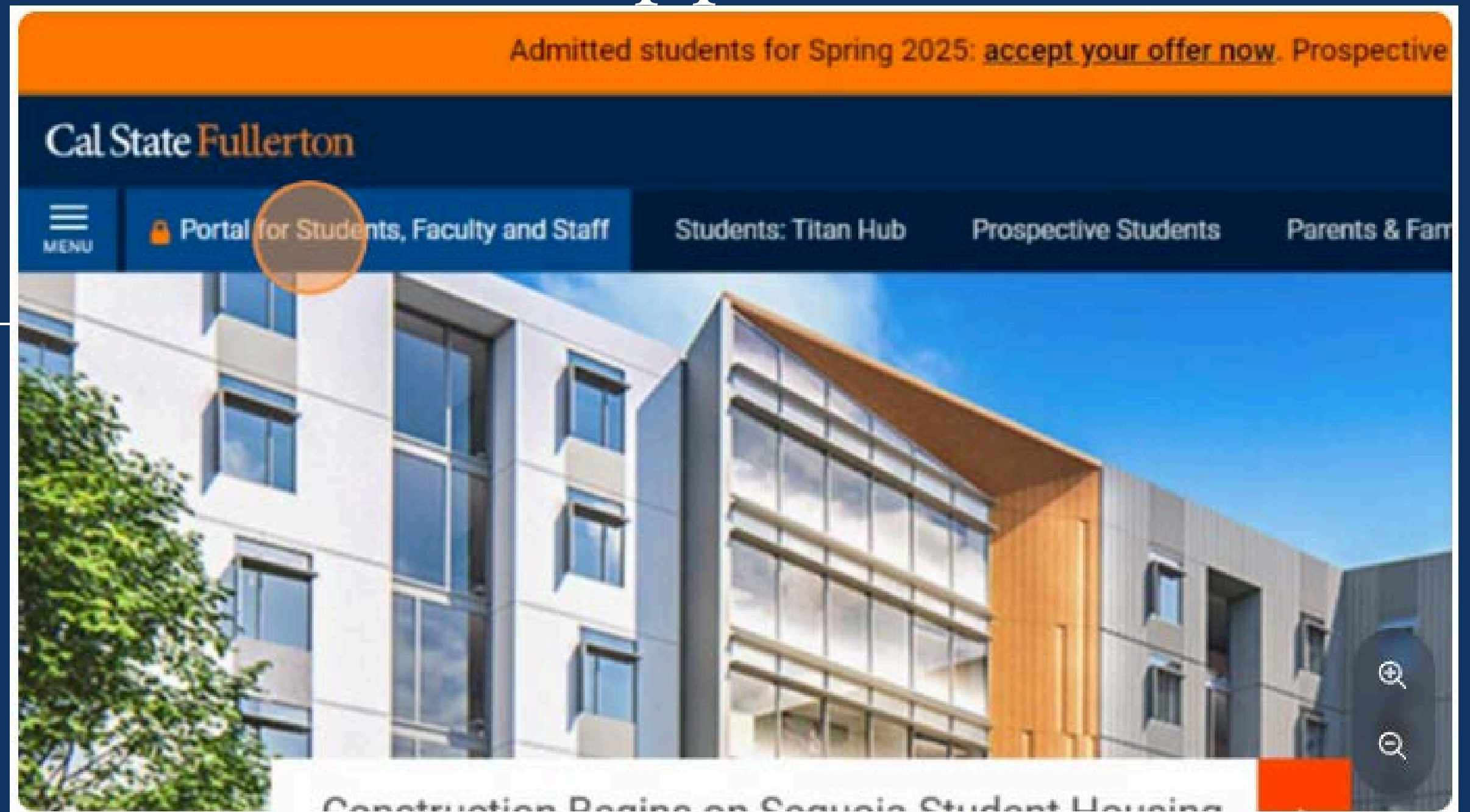
New AI takes Hotel
Receipts and Itemizes
them



How to Access * and Download the Concur App



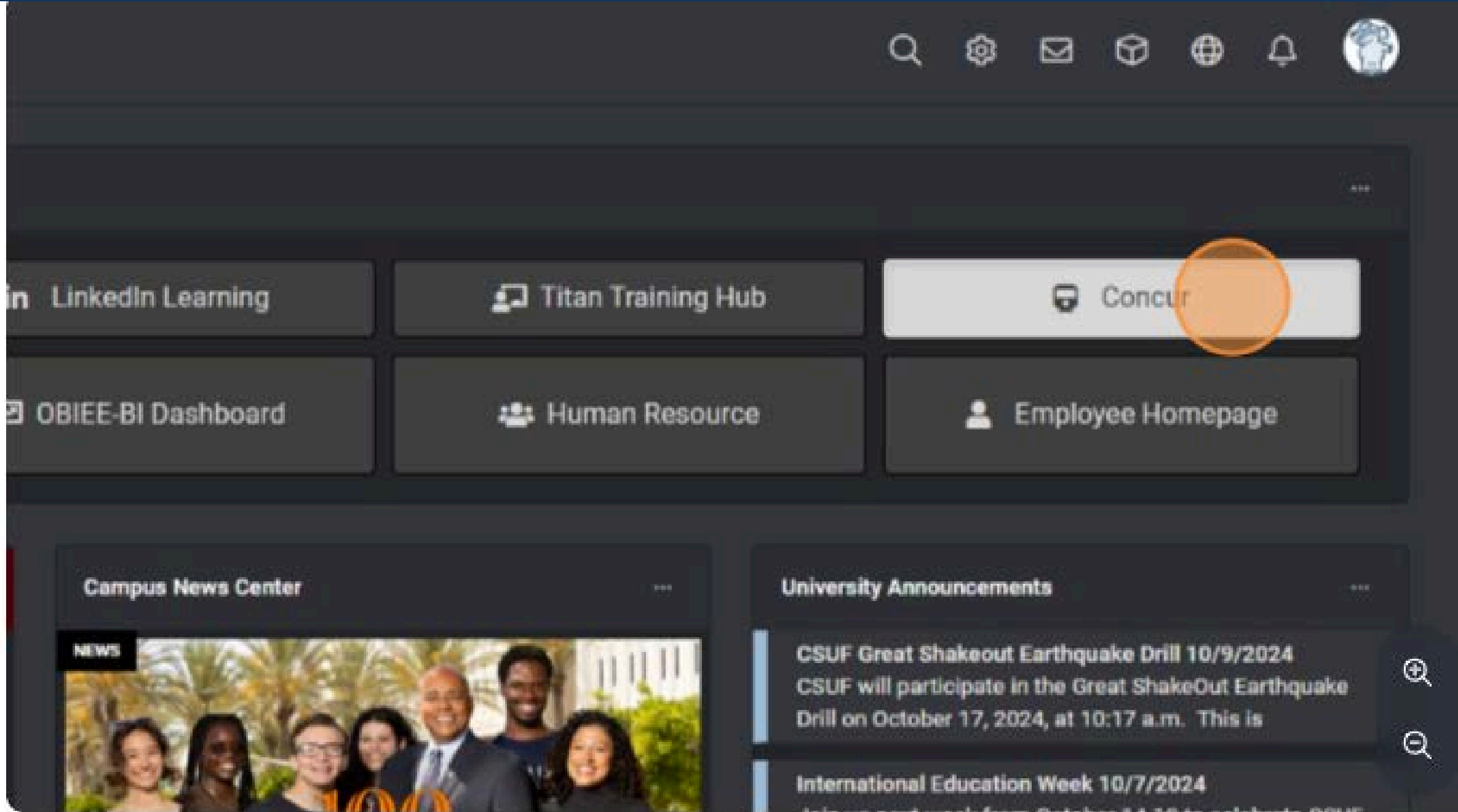
Click "Portal for Students, Faculty, and Staff"



How to Access * *and Download the Concur App*



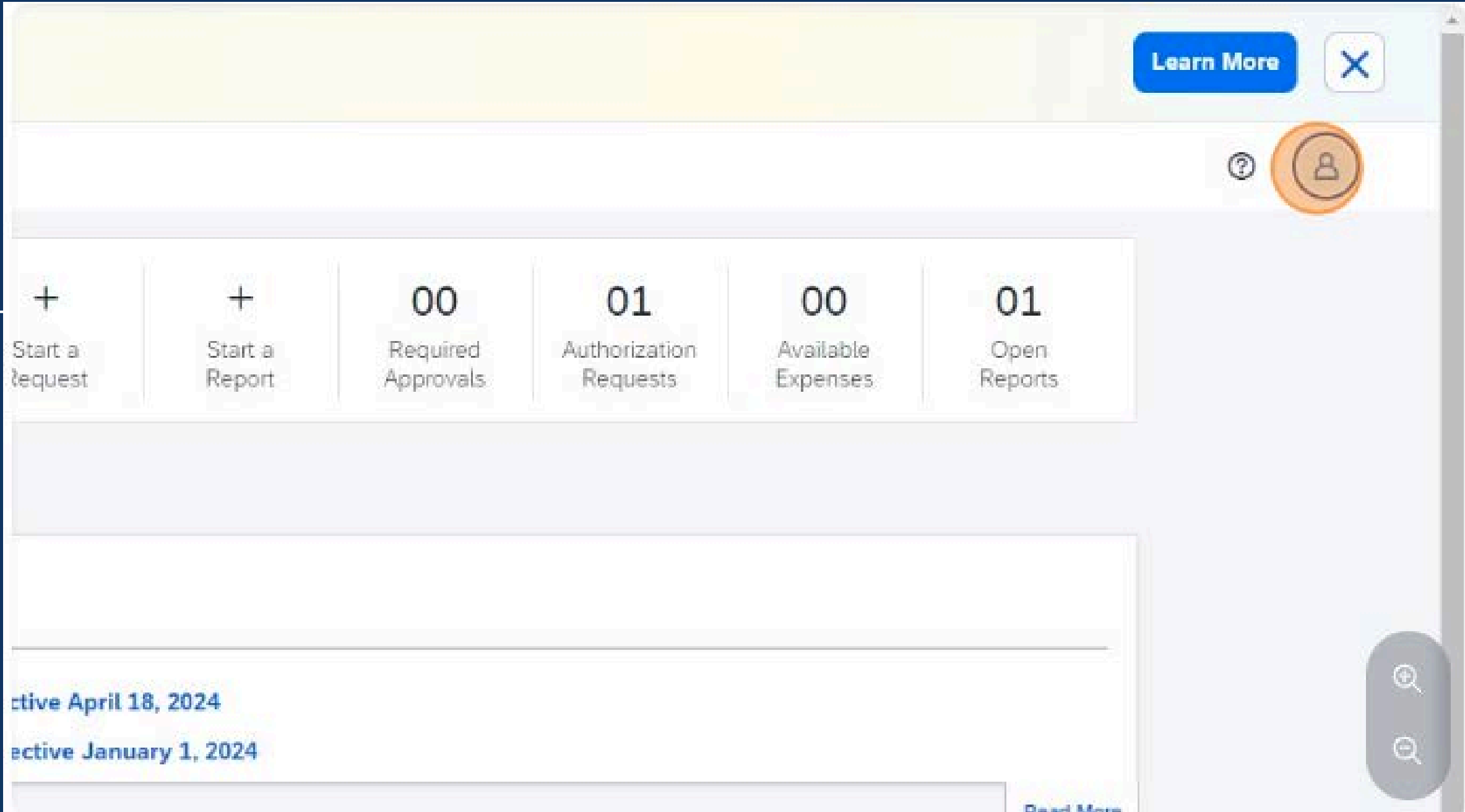
Click "Concur"



How to Access * and Download the Concur App



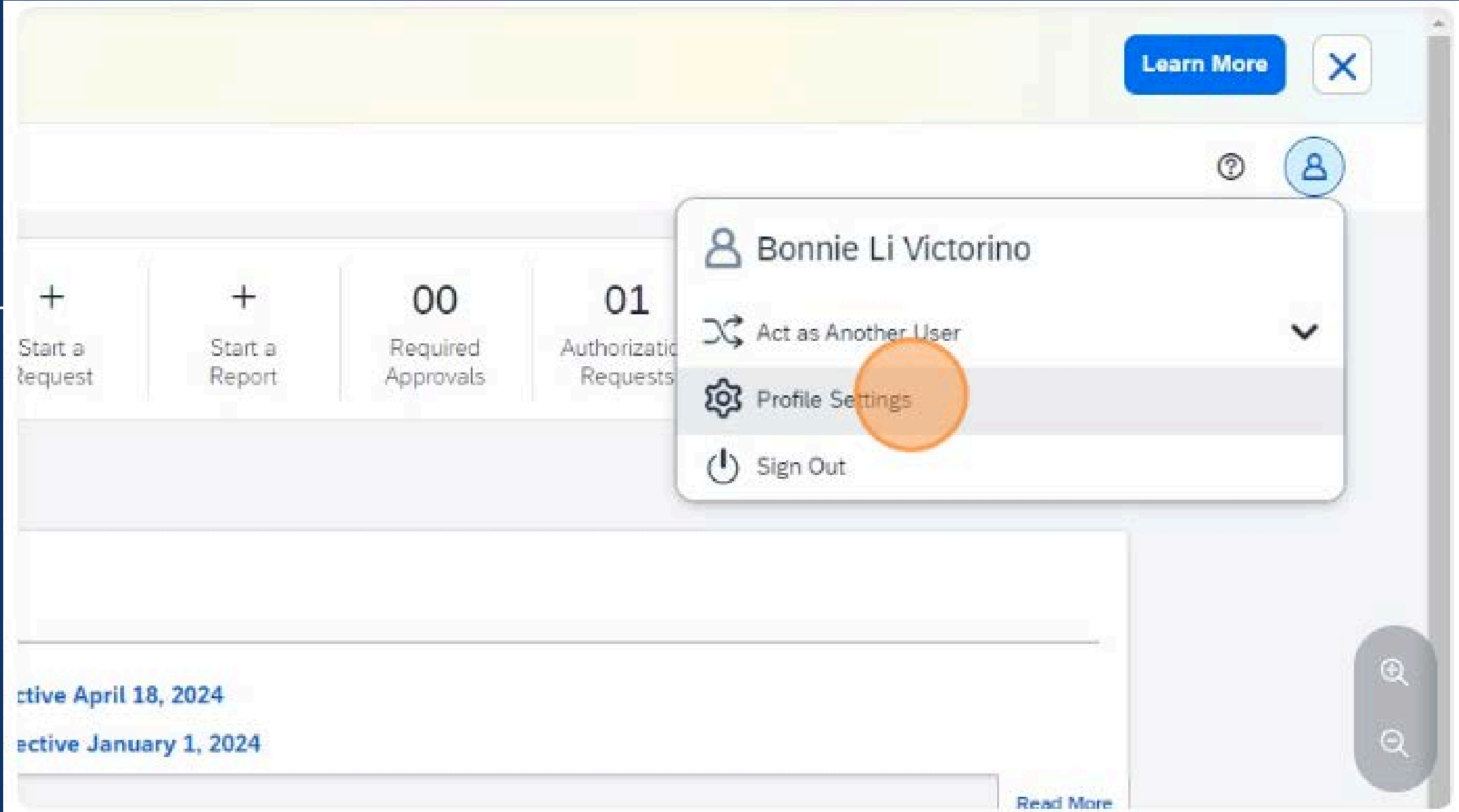
Click "Profile Icon"



How to Access * and Download the Concur App



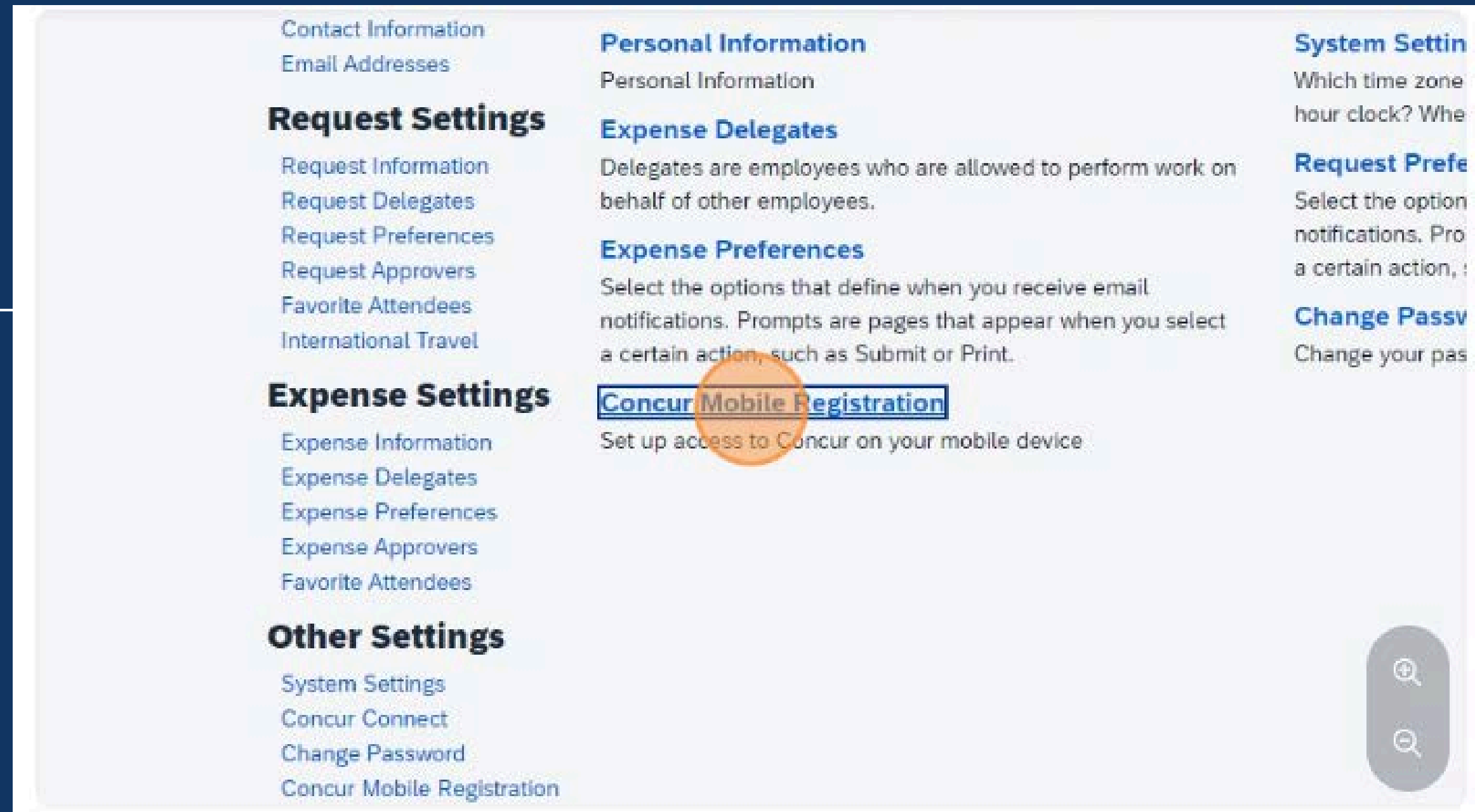
Click "Profile Settings"



How to Access and Download the Concur App



Click "Concur for Mobile Registration"



The screenshot shows a user settings page with the following sections:

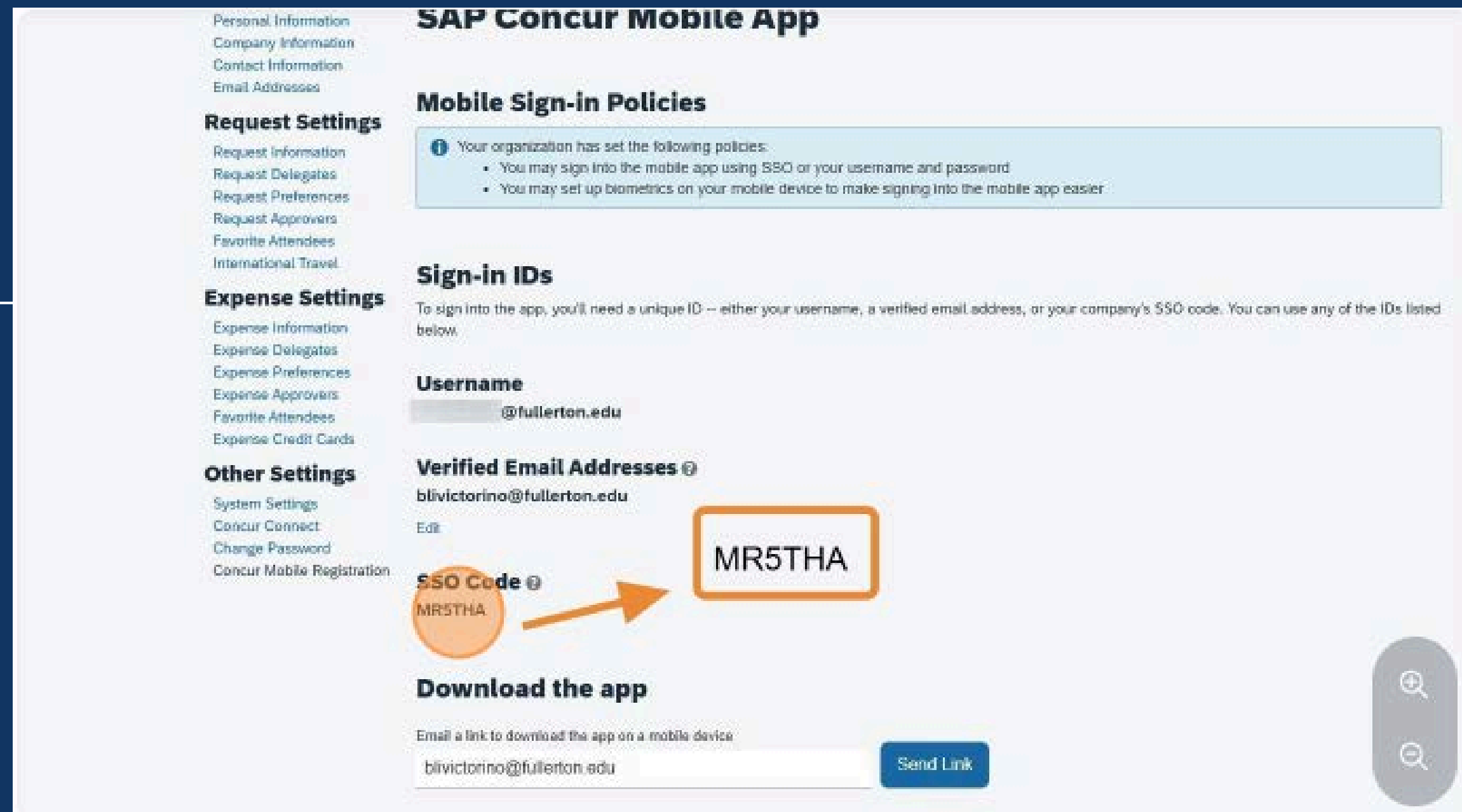
- Contact Information**
 - Email Addresses
- Request Settings**
 - Request Information
 - Request Delegates
 - Request Preferences
 - Request Approvers
 - Favorite Attendees
 - International Travel
- Expense Settings**
 - Expense Information
 - Expense Delegates
 - Expense Preferences
 - Expense Approvers
 - Favorite Attendees
- Other Settings**
 - System Settings
 - Concur Connect
 - Change Password
 - Concur Mobile Registration
- Personal Information**
 - Personal Information
- Expense Delegates**
 - Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**
 - 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.
- System Settings**
 - Which time zone or hour clock? When
- Request Preferences**
 - Select the option for notifications. Provide a certain action, :
- Change Password**
 - Change your password

The 'Concur Mobile Registration' option is highlighted with a blue box and an orange circle. Below it, the text reads: 'Set up access to Concur on your mobile device'. In the bottom right corner, there is a search icon and a magnifying glass icon.

How to Access and Download the Concur App



Enter Universal Code
"MR5THA"



SAP Concur Mobile App

Personal Information
Company Information
Contact Information
Email Addresses

Request Settings

Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees
International Travel

Expense Settings

Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees
Expense Credit Cards

Other Settings

System Settings
Concur Connect
Change Password
Concur Mobile Registration

Mobile Sign-in Policies

Sign-in IDs

To sign into the app, you'll need a unique ID – either your username, a verified email address, or your company's SSO code. You can use any of the IDs listed below.

Username

@fullerton.edu

Verified Email Addresses

blivictorino@fullerton.edu

Edit

SSO Code

MR5THA

Download the app

Email a link to download the app on a mobile device

blivictorino@fullerton.edu

MR5THA

How to Access * and Download the Concur App



"Username" will be your
CWID (9-Digit Number)
@fullerton.edu

The screenshot shows the SAP Concur Mobile App settings page. On the left is a navigation menu with sections: Your Information, Request Settings, Expense Settings, and Other Settings. The main content area is titled 'SAP Concur Mobile App' and includes 'Mobile Sign-in Policies', 'Sign-in IDs', 'Verified Email Addresses', and 'SSO Code'. A blue box contains sign-in policies. Under 'Sign-in IDs', the 'Username' field is highlighted with an orange circle and an arrow pointing to it from the text 'CWID(9-Digit)'. Below this are 'Verified Email Addresses' and 'SSO Code'. At the bottom, there is a 'Download the app' section with a 'Send Link' button.

Your Information
Personal Information
Company Information
Contact Information
Email Addresses

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees
International Travel

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

Other Settings
System Settings
Concur Connect
Change Password
Concur Mobile Registration

SAP Concur Mobile App

Mobile Sign-in Policies

Your organization has set the following policies:

- You may sign into the mobile app using SSO or your username and password
- You may set up biometrics on your mobile device to make signing into the mobile app easier.

Sign-in IDs

To sign into the app, you'll need a unique ID – either your username, a verified email address, or your company's SSO code. You can use any of the IDs listed below.

Username ← CWID(9-Digit)
@fullerton.edu

Verified Email Addresses

blivictorino@fullerton.edu
Edit

SSO Code

MR5THA

Download the app

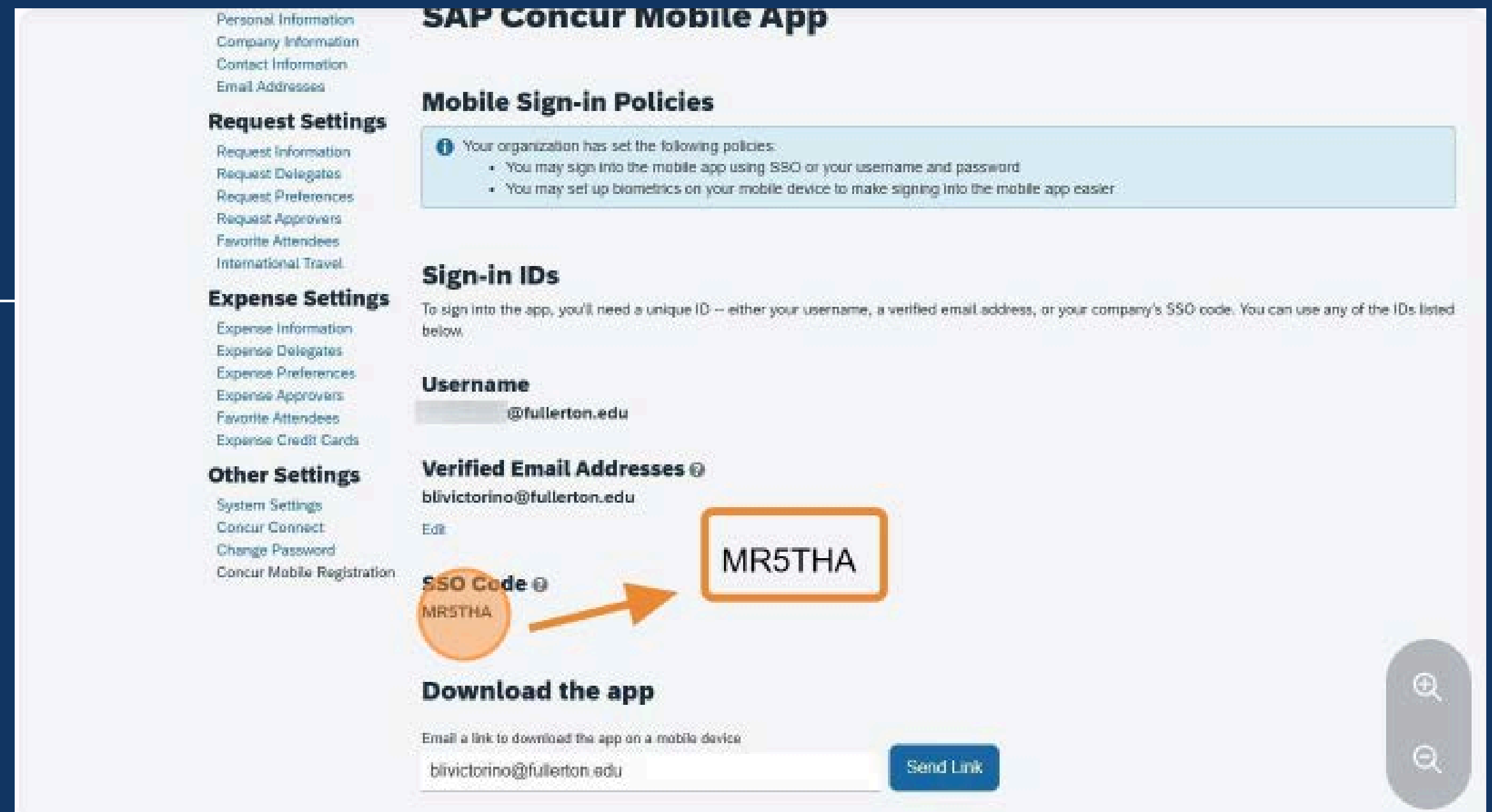
Email a link to download the app on a mobile device

blivictorino@fullerton.edu [Send Link](#)

How to Access and Download the Concur App



Download the SAP Concur App on your Mobile Device (Phone or Tablet) through Apple Store or Google Play



The screenshot shows the 'SAP Concur Mobile App' settings page. On the left is a navigation menu with categories: Personal Information, Company Information, Contact Information, Email Addresses, Request Settings, Expense Settings, and Other Settings. The main content area is titled 'SAP Concur Mobile App' and includes 'Mobile Sign-in Policies' (with a note about SSO and biometrics), 'Sign-in IDs' (explaining the need for a unique ID), 'Username' (with a field containing '@fullerton.edu'), 'Verified Email Addresses' (with 'blivictorino@fullerton.edu' listed), and 'SSO Code' (with 'MR5THA' in a circle). An orange arrow points from the SSO Code to a larger box containing 'MR5THA'. At the bottom, there is a 'Download the app' section with a text input field containing 'blivictorino@fullerton.edu' and a 'Send Link' button. A search icon is visible in the bottom right corner.

How to Access *
and Download the Concur App

☑ *Your turn...*



Additional Resources:

[Click here for more Concur Download Info](#)

2

Connect Uber and Lyft

Why the Uber & Lyft App is Useful

Uber

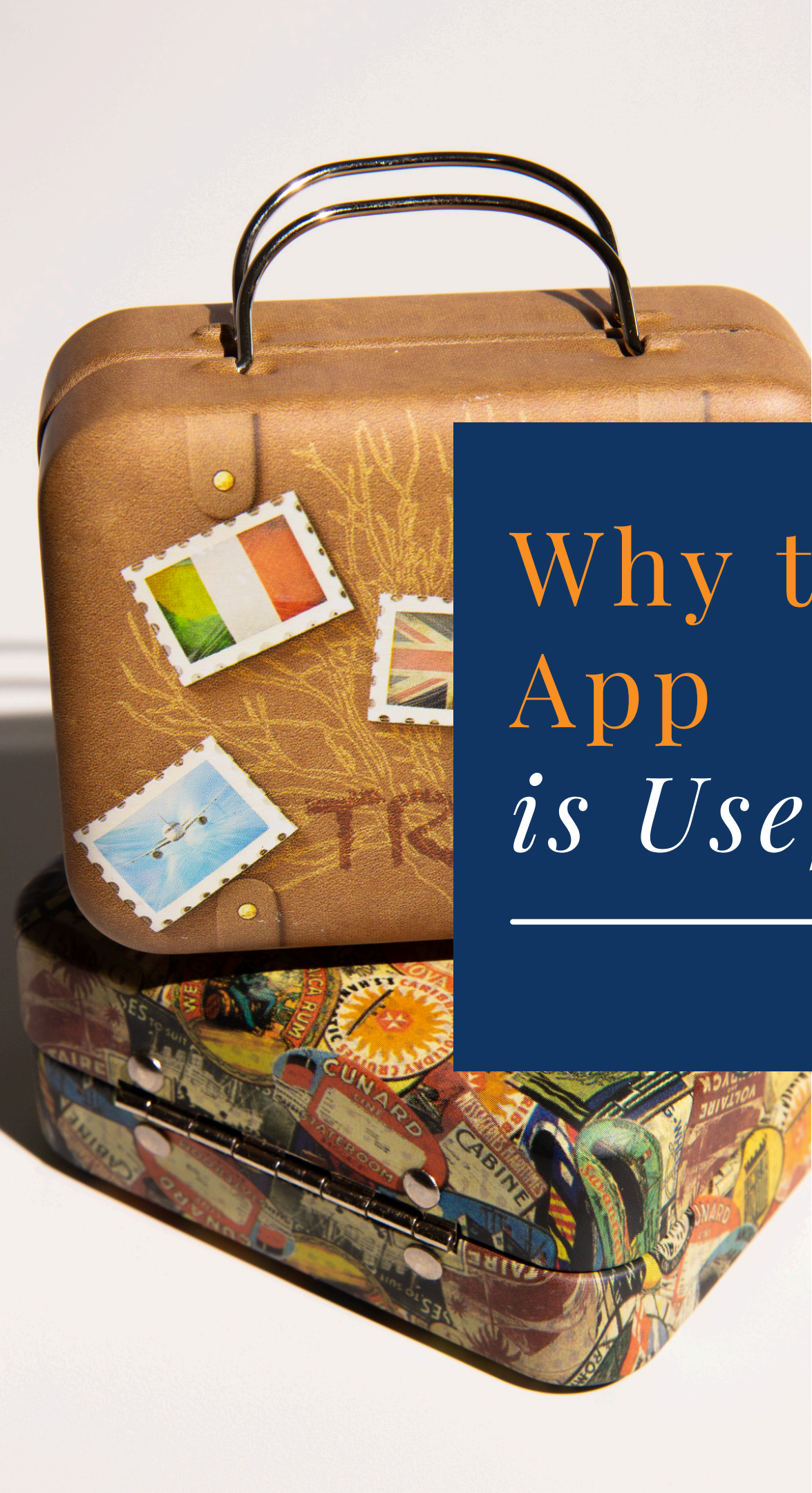
lyft



Saves time and reduces stress.



Ports your Uber and Lyft Rides directly into the Concur Portal



How to Access * and Download Uber and Lyft



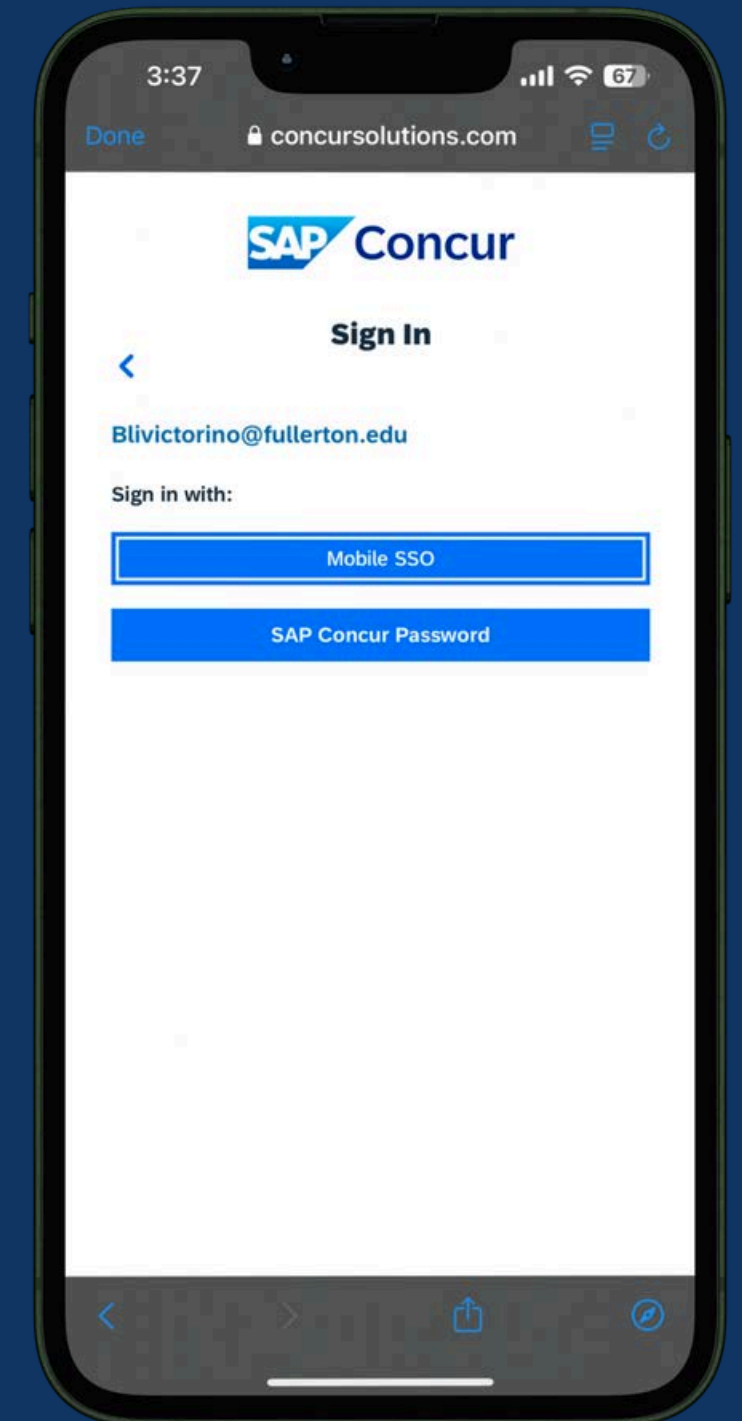
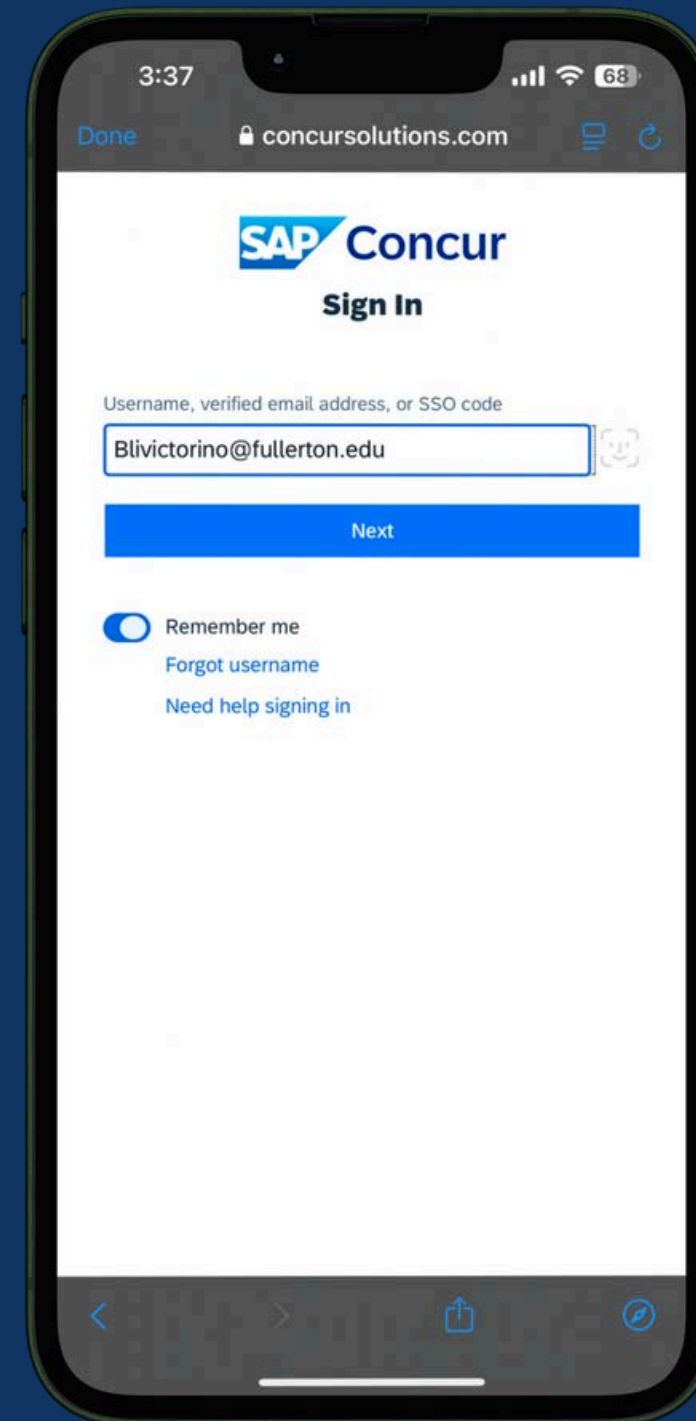
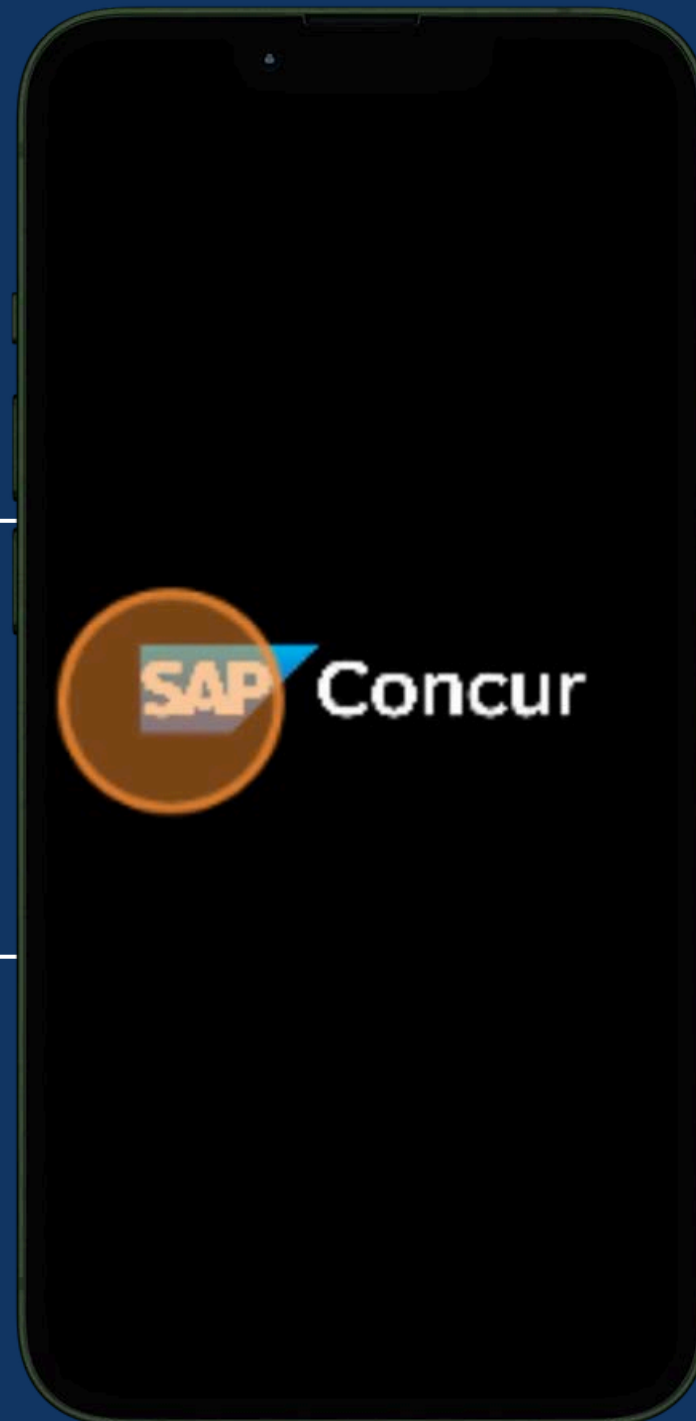
Click "SAP Concur App"



Enter "EMAIL@fullerton.edu"



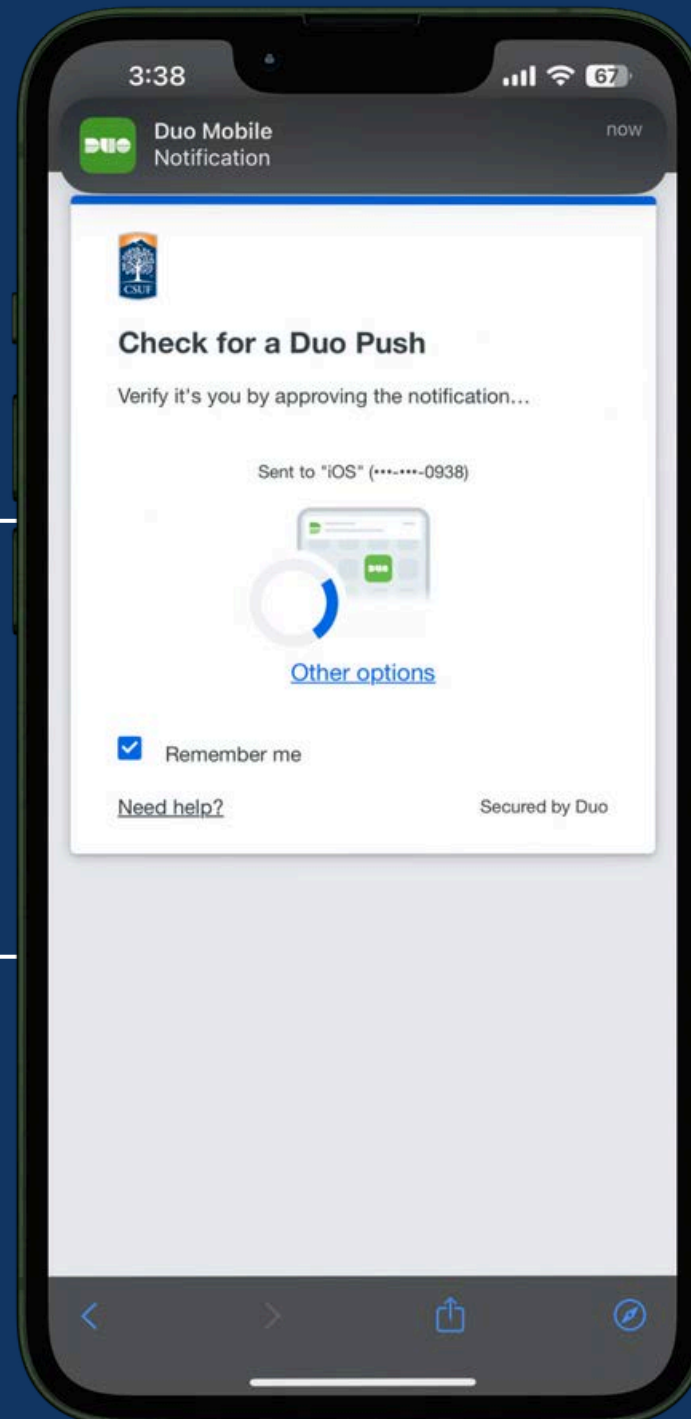
Click "Mobile SSO"



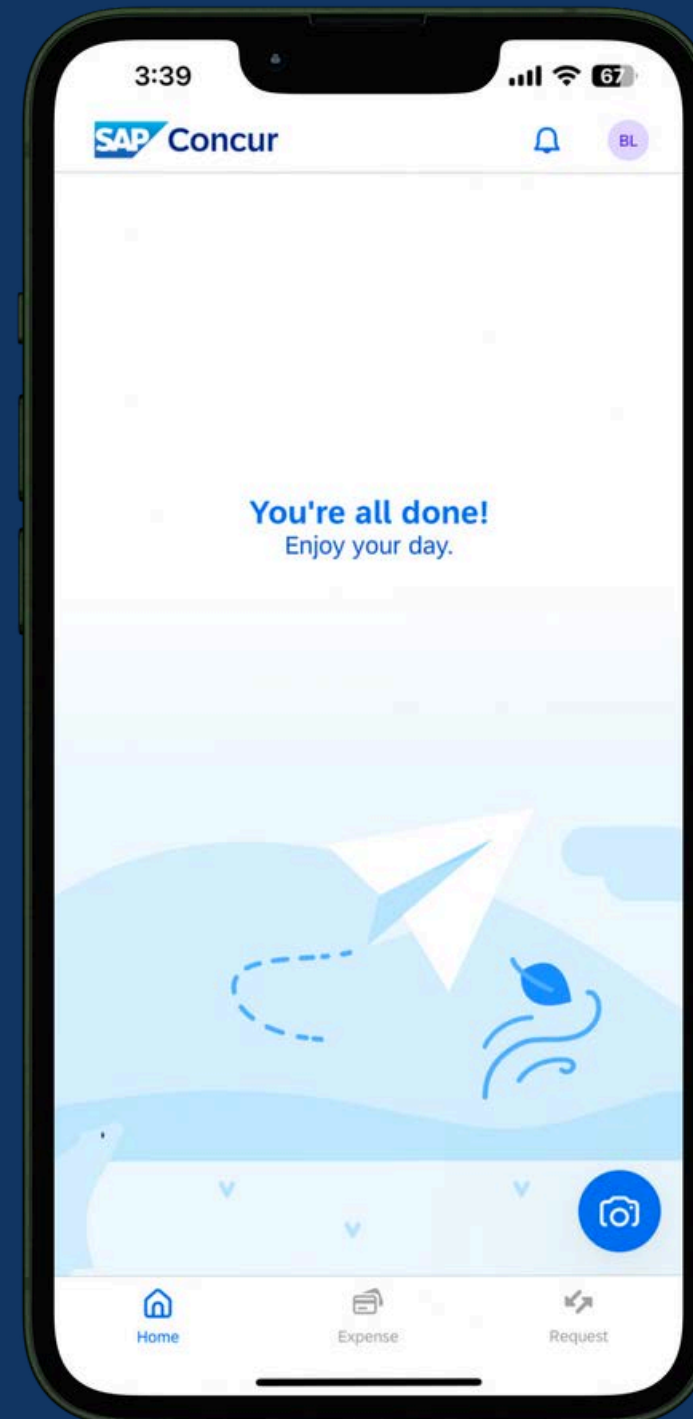
How to Access * and Download Uber and Lyft



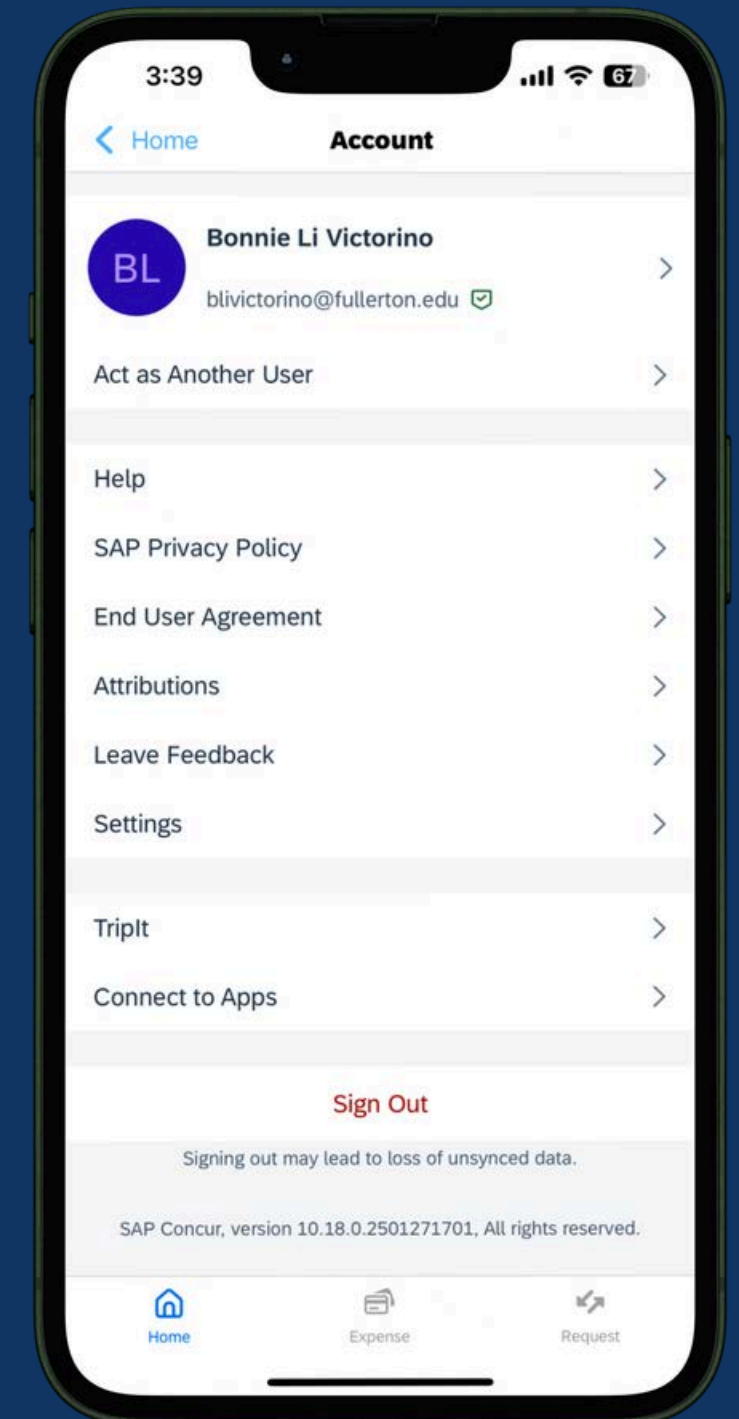
Click "Duo Push"



Once DUO Access is done, you will be logged into the SAP Concur App



Click "Initials at the top Right Corner"



How to Access * and Download Uber and Lyft



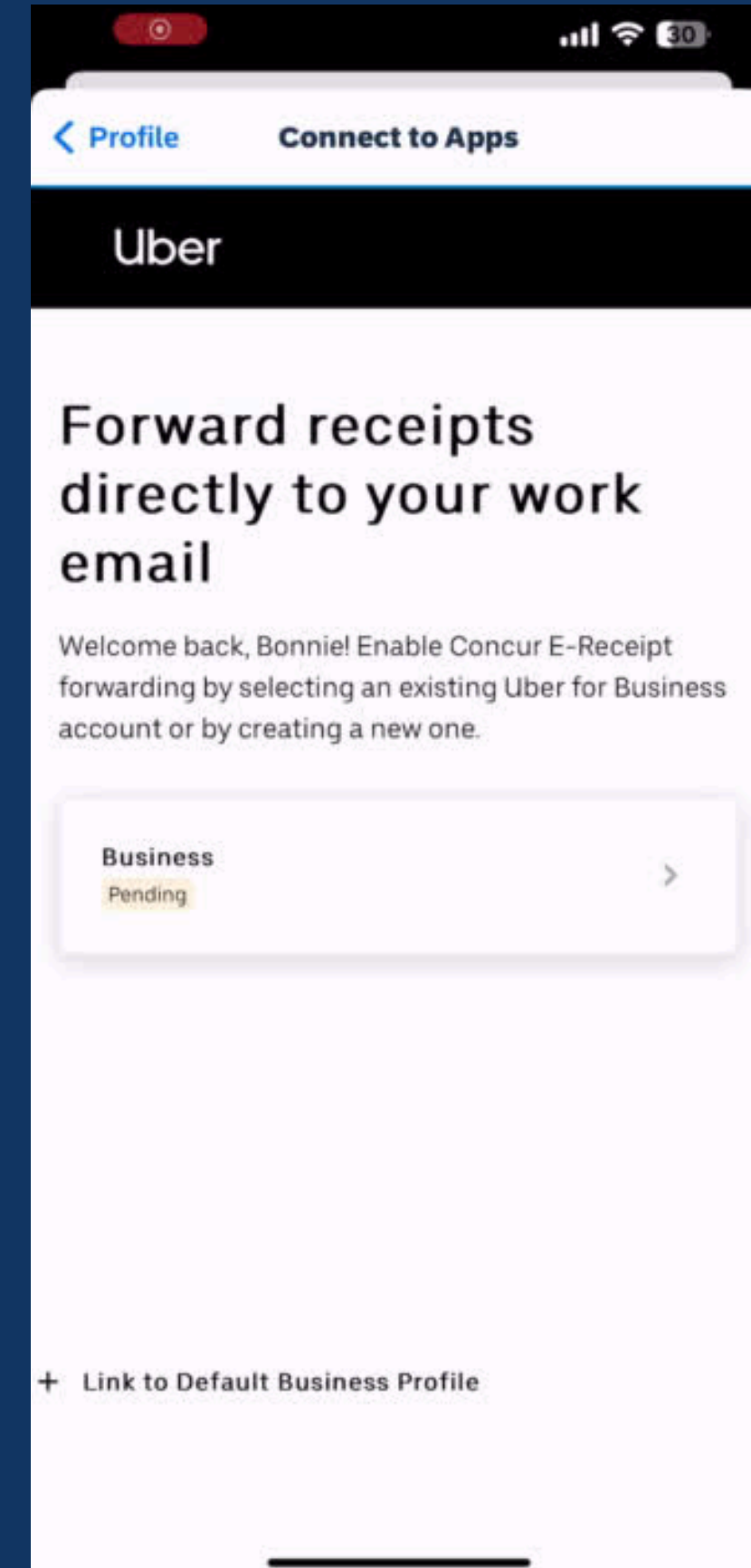
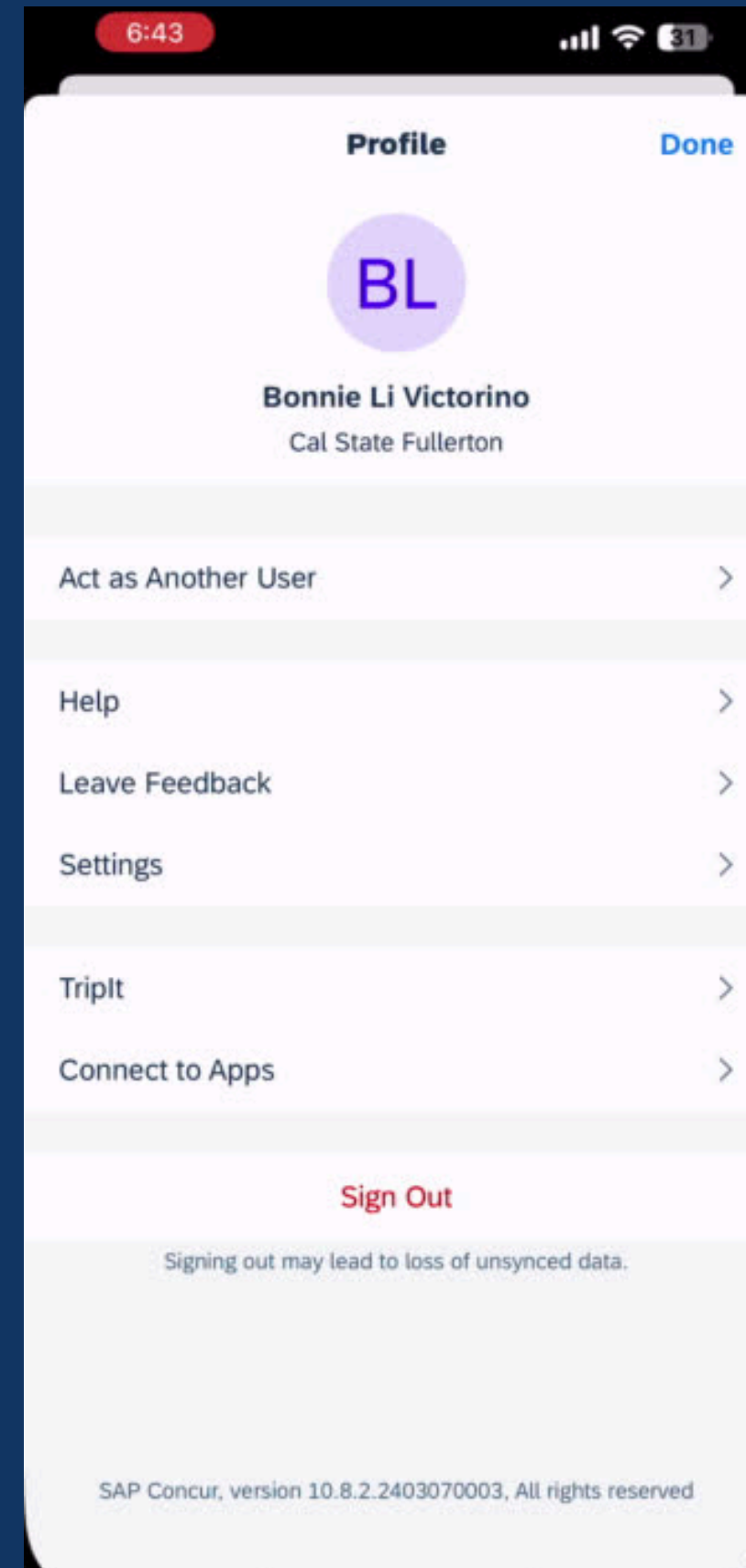
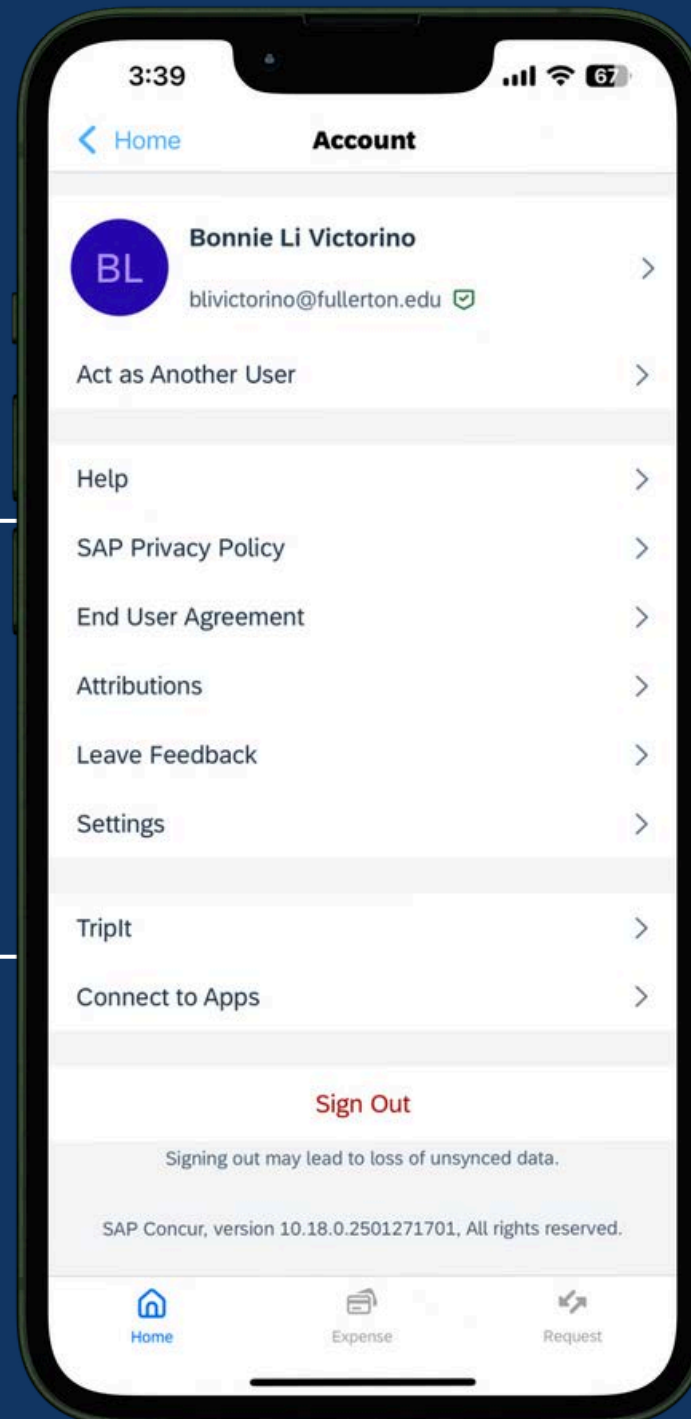
Click "Connect to Apps"



Select "Uber" and we will connect that first. We will then continue onto Lyft



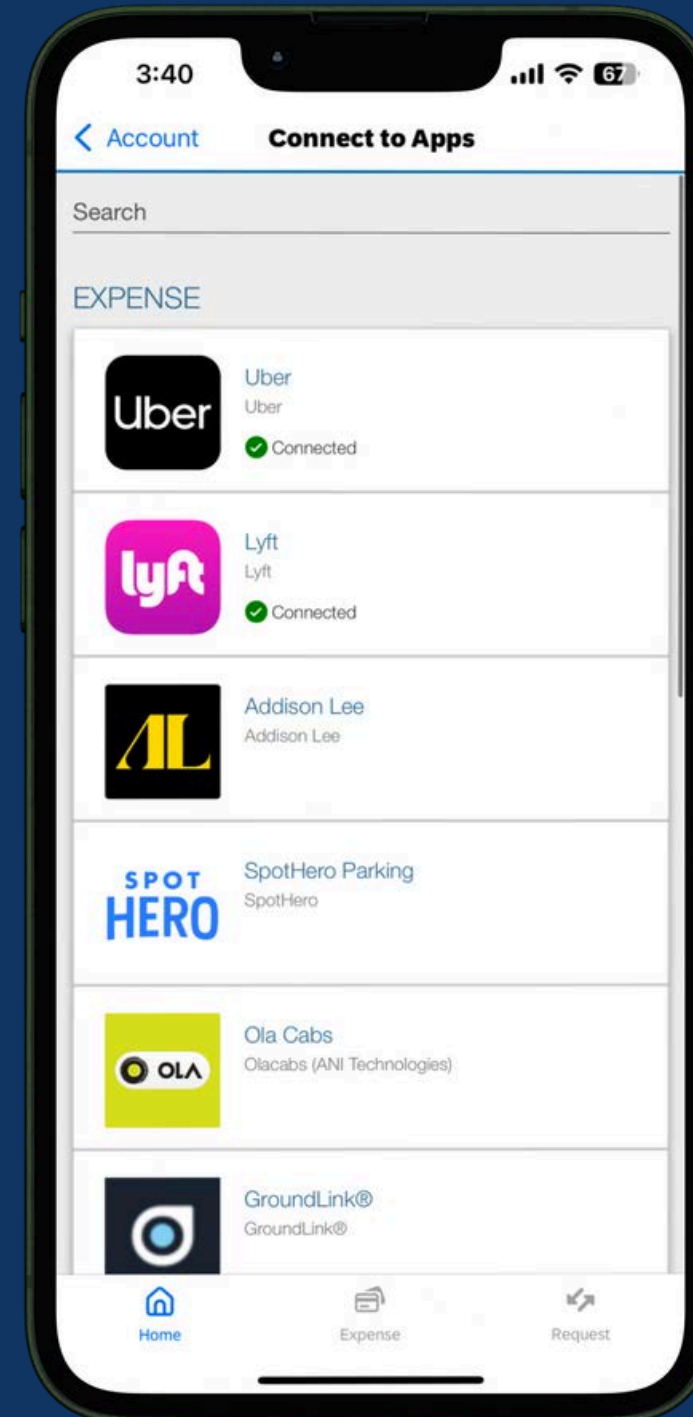
Select Forward Receipts to your work email



How to Access * and Download Uber and Lyft



Check to see if your
apps are connected



How to Access * *and Download the Uber and Lyft*

 *Your turn...*

Uber

lyft

3

Connect Triplt App

Why Triplt App *is Useful*



Saves time and gives you real-time travel data



Helps with your travel itinerary

How to Access and connect TripIt



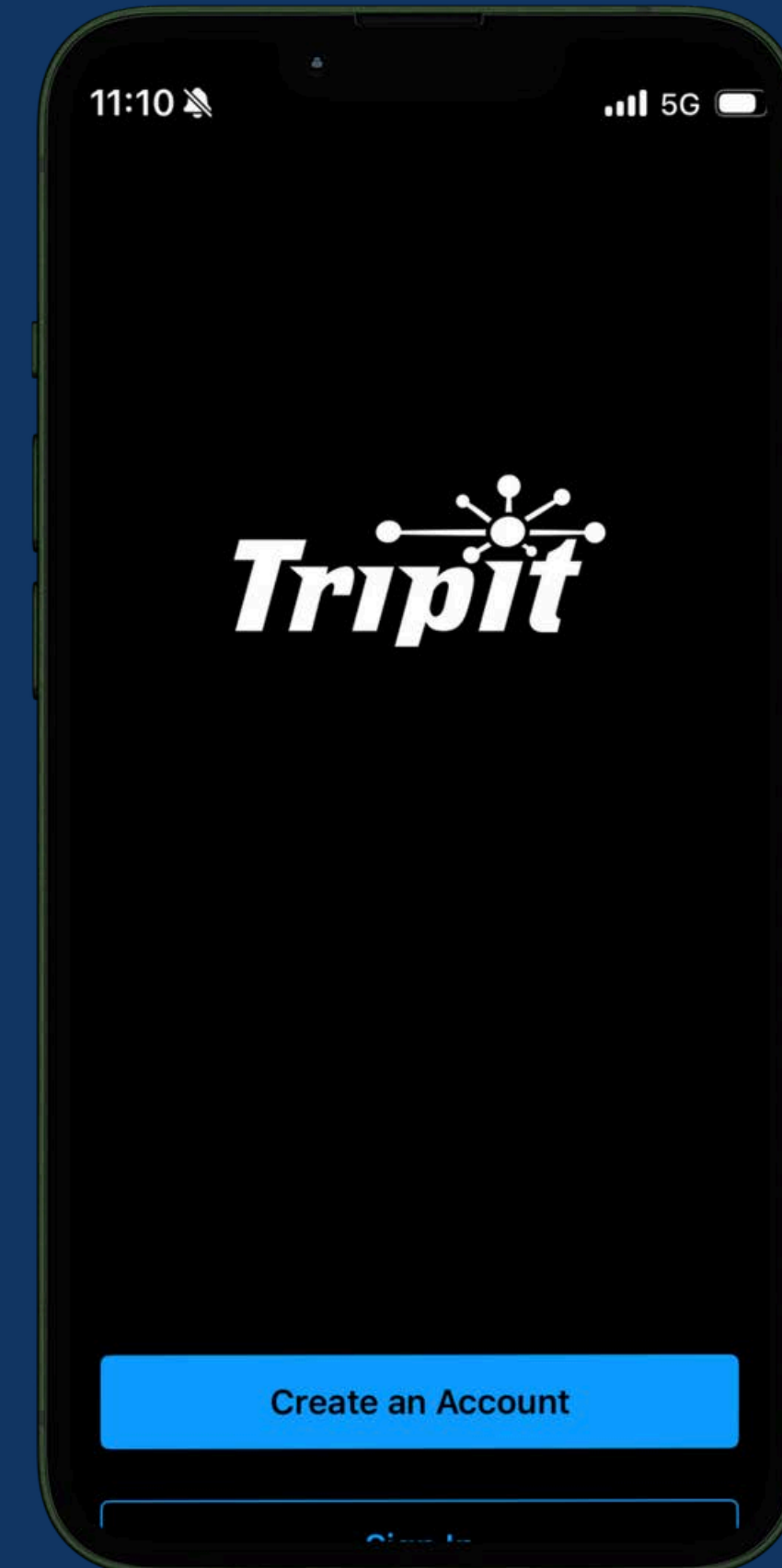
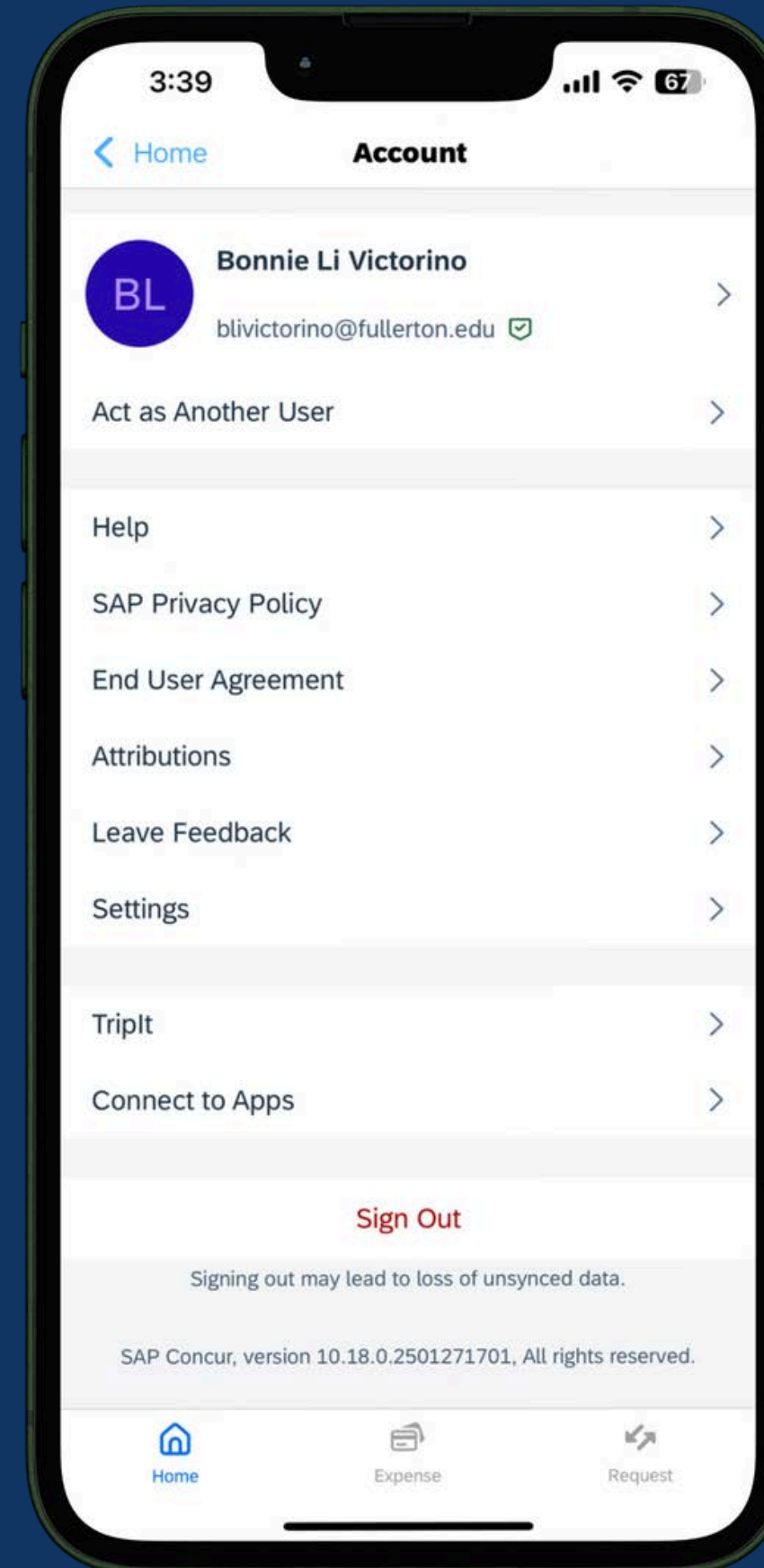
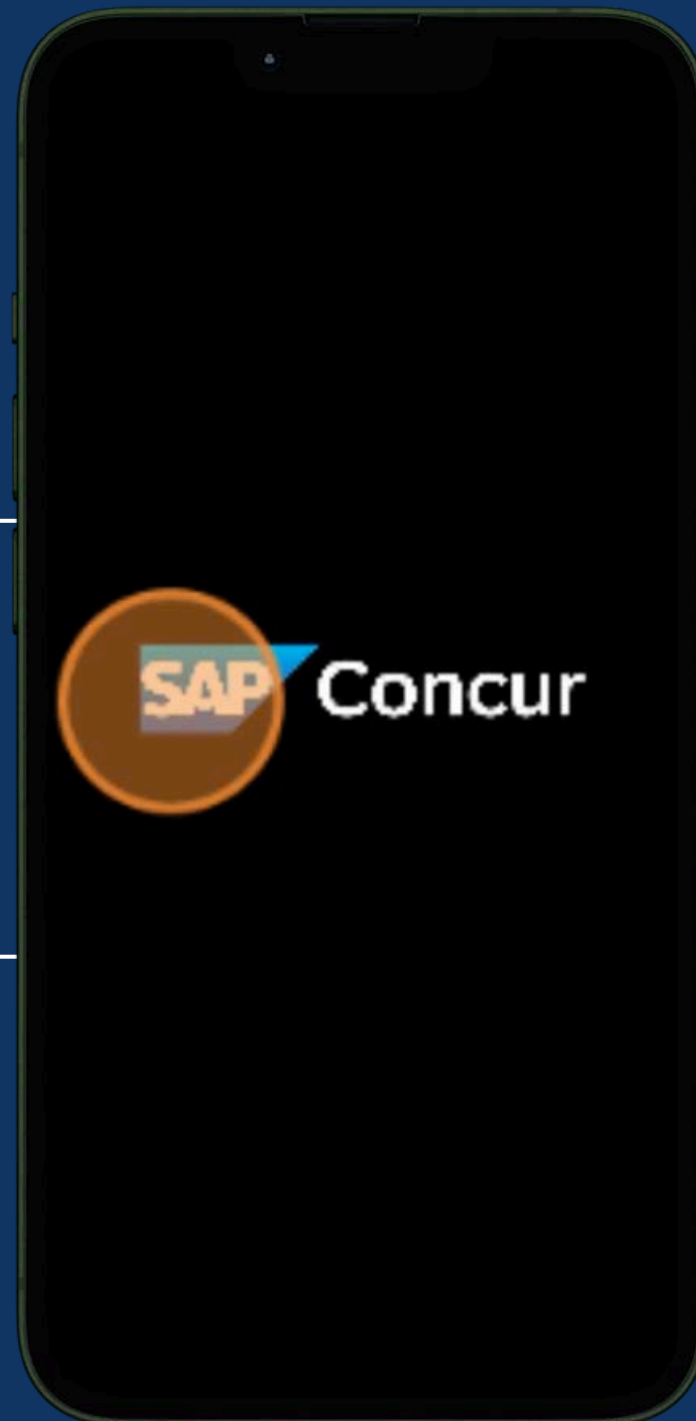
Click "SAP Concur App"



From Profile Initials Select "TripIt"



Once Connected "Create an Account"



How to Access * and connect TripIt



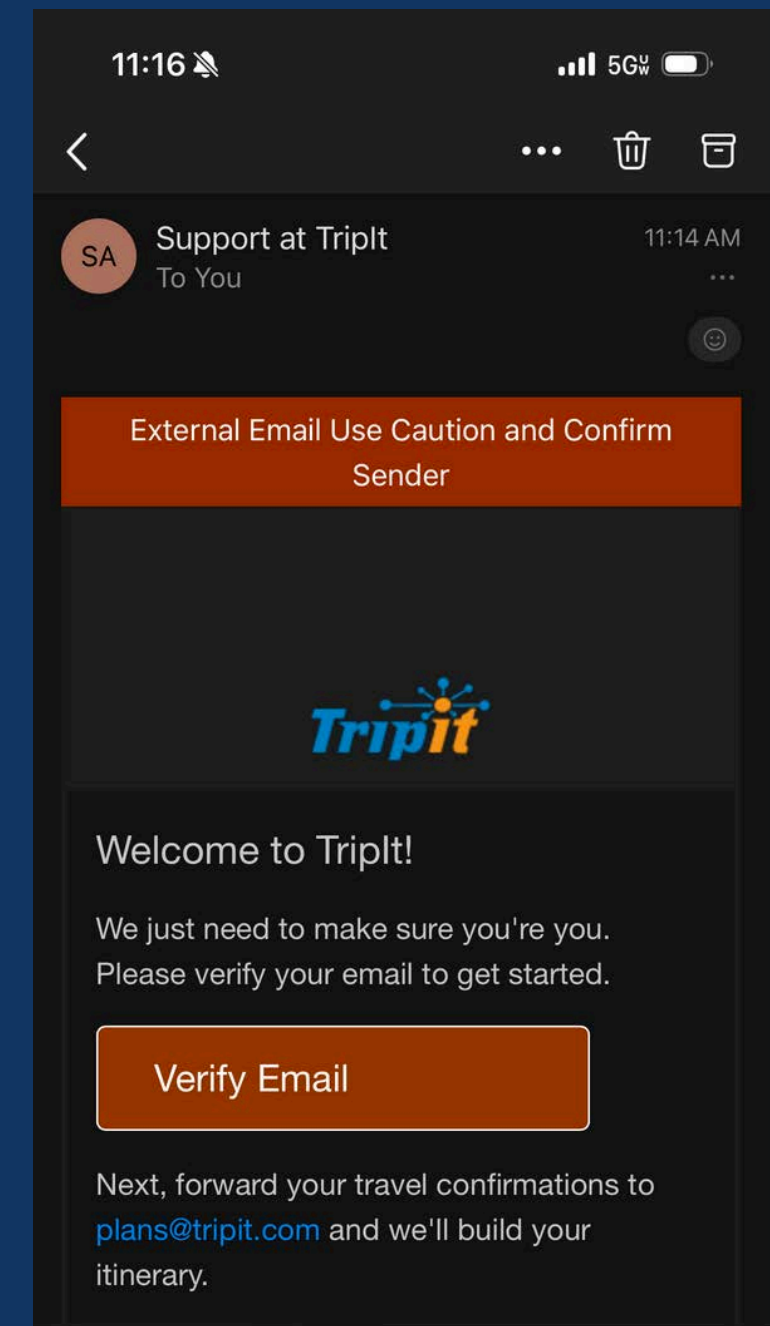
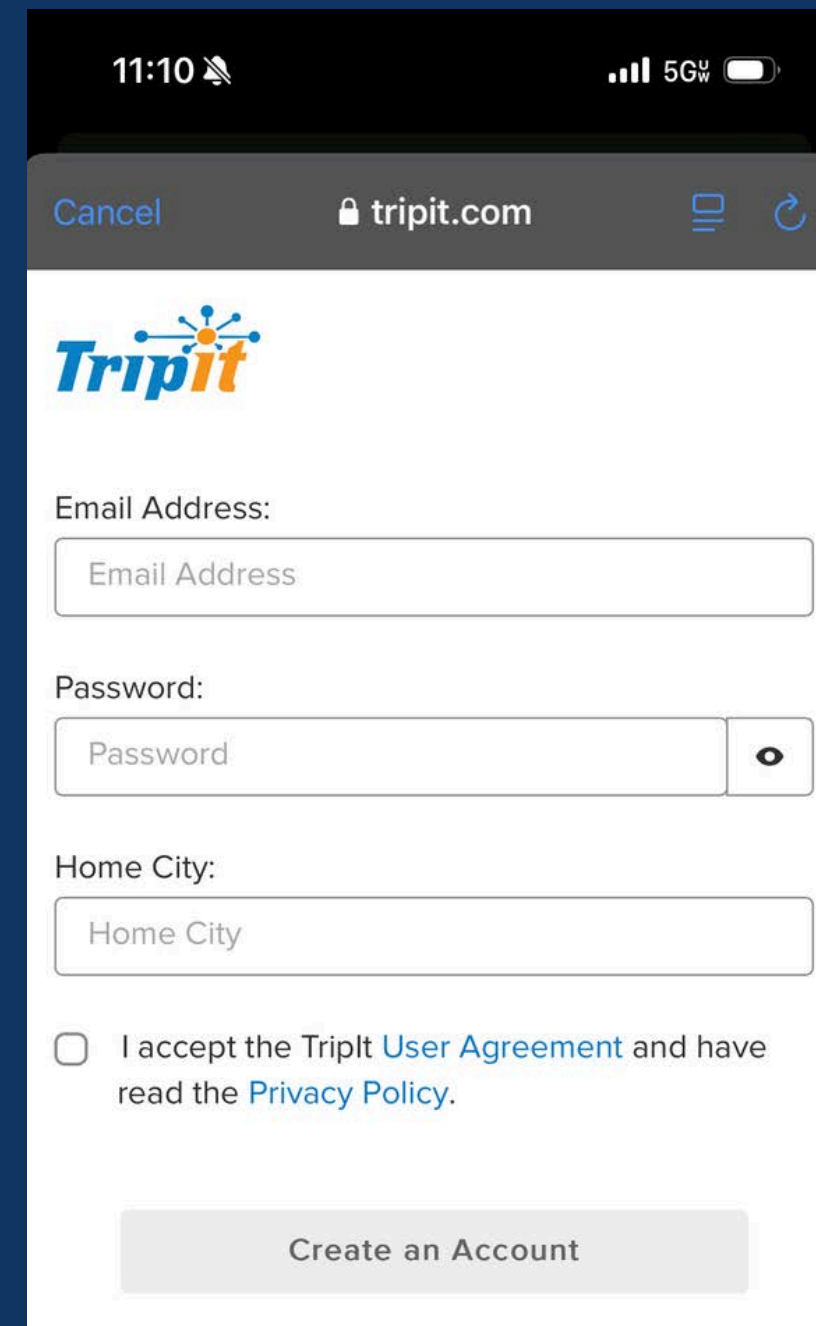
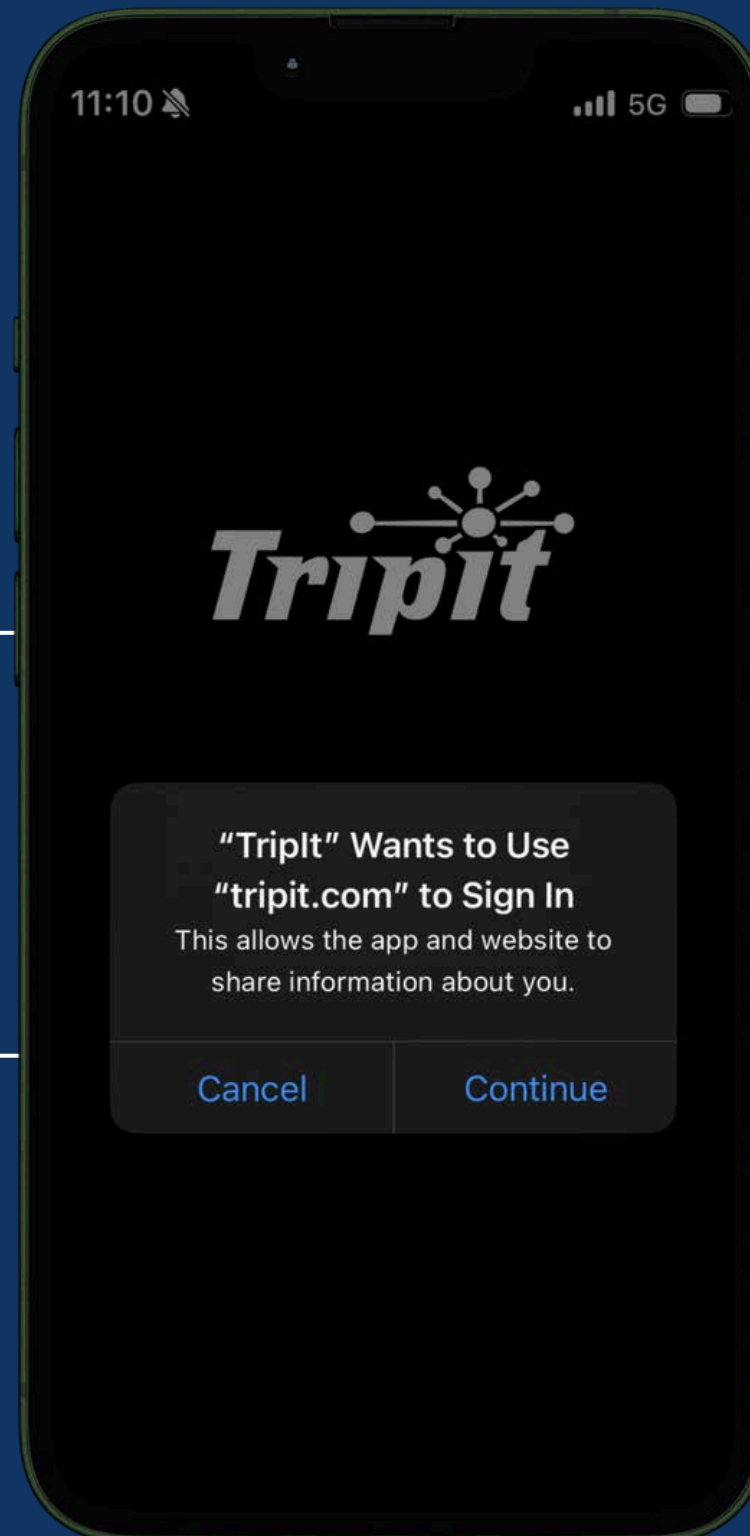
TripIt Pro will ask you to use their website to create an account



It will proceed to ask you to accept the "TripIt User Agreements"



Once Complete Click "Verify Email"



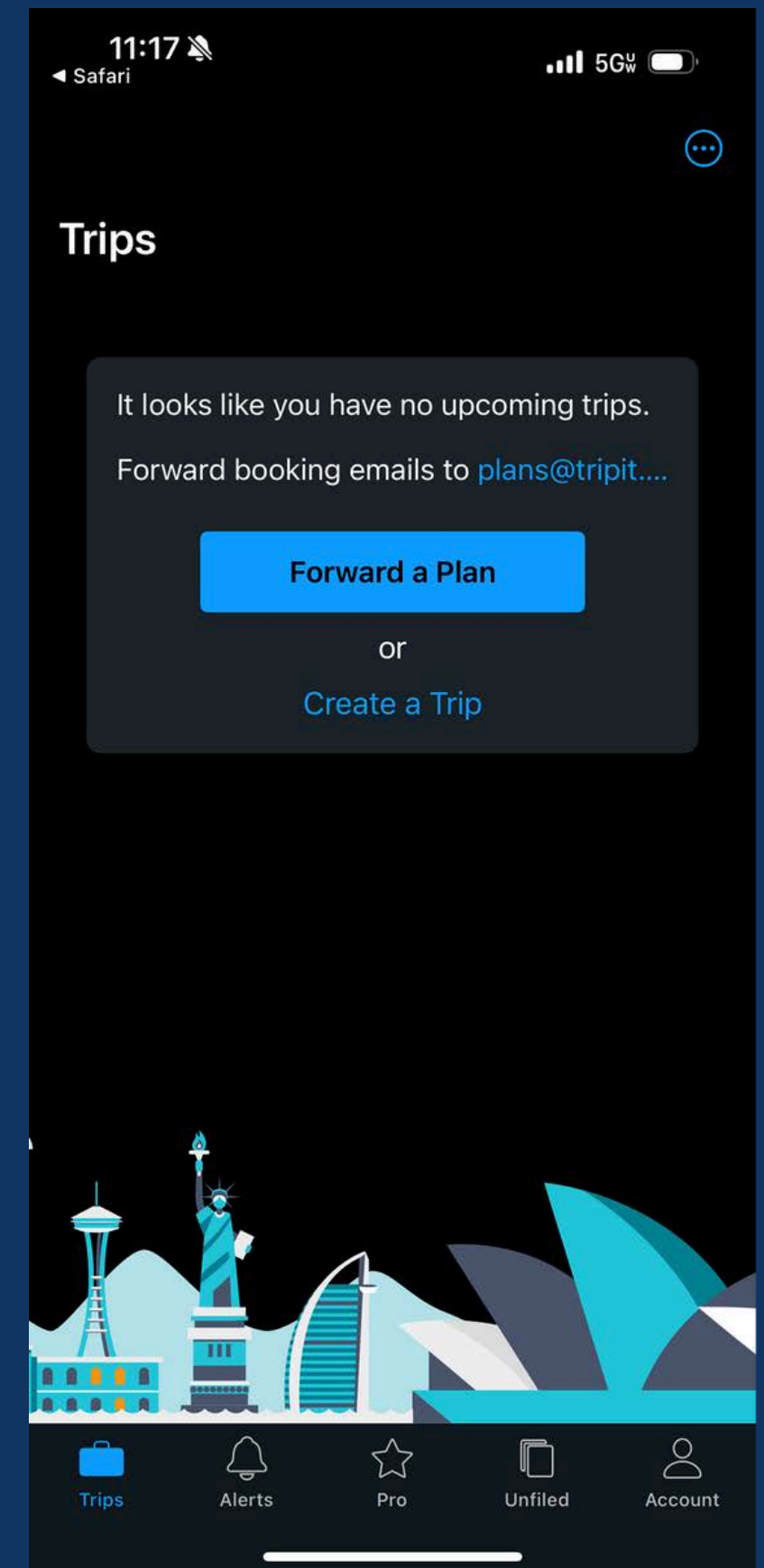
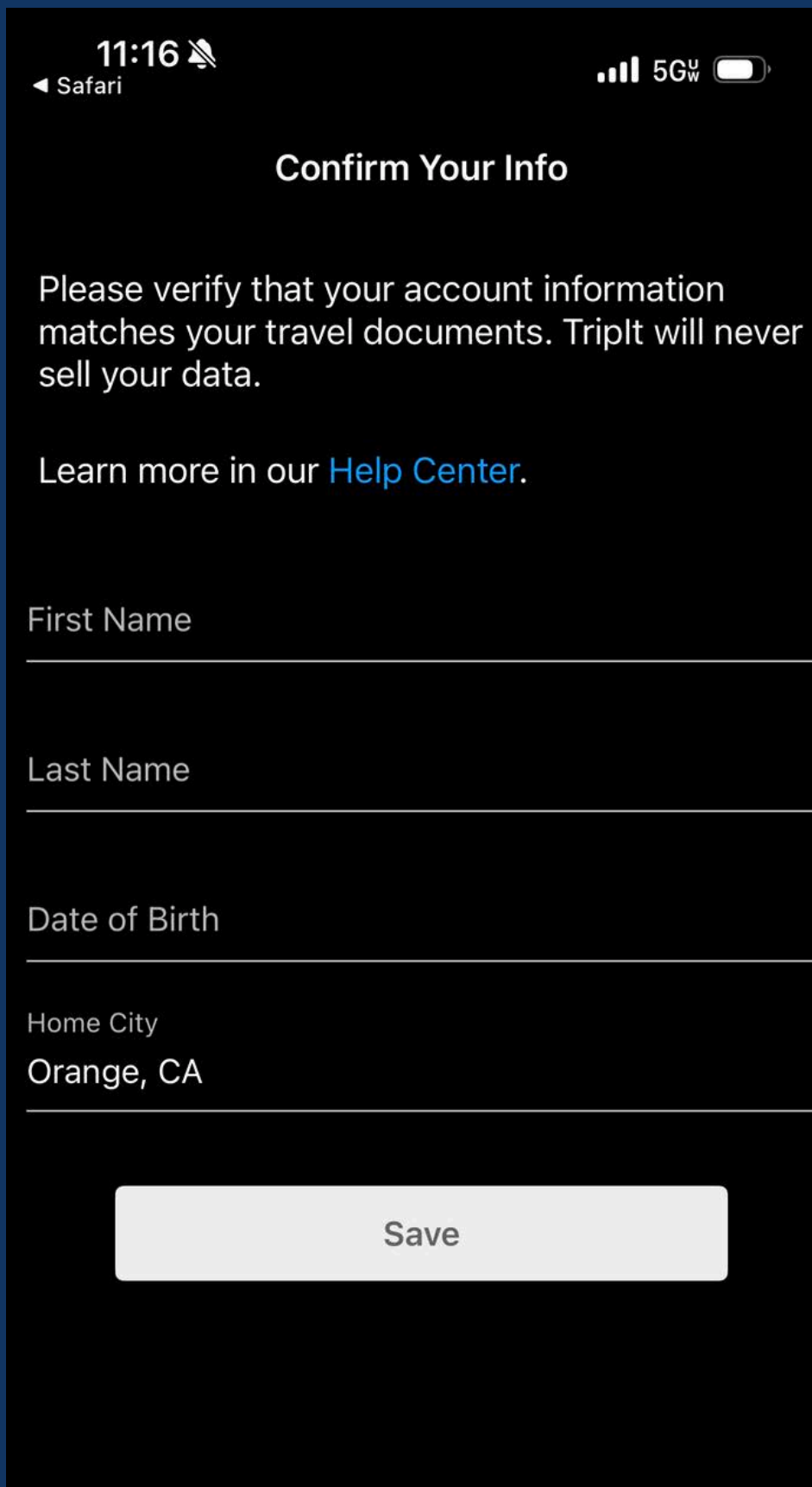
How to Access and connect TripIt



TripIt Pro will ask you to Confirm your information



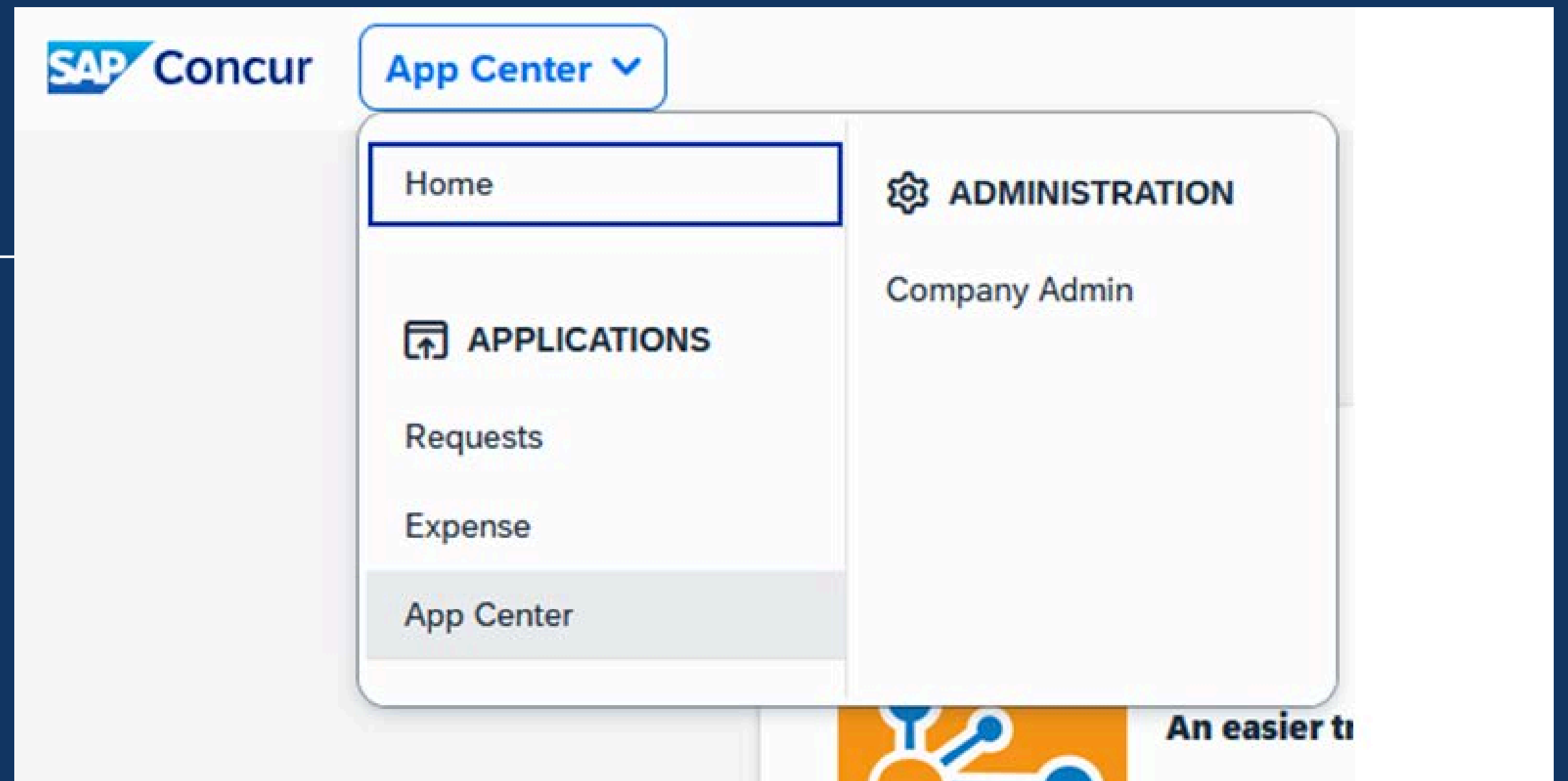
Forward a Plan by emailing itinerary documents to plans@tripit.com



How to Access * and connect TripIt through your Computer



Through your desktop App, go to Home, drop-down and Click "App Center"



How to Access * and connect TripIt through your Computer



Select "Triplt"

SAP Concur App Center

App Center

Search

Category:

Works with Products: Travel - Standard, Trave... X





Countries/Regions Available: United States of America

Show newly released apps

Show listings not in my language

Popular User Connections

Do more with your favorite apps and services by linking them to your SAP Concur account

| | | | |
|---|---|--|---|
|  Concur for Mobile One app for travel, receipts, reports |  Triplt An easier trip, every time |  Uber Tap. Ride. Expense. |  Lyft Rides that do the work for you |
|---|---|--|---|

How to Access * and connect TripIt through your Computer



Activate your TripIt
Pro Subscription

Activate Your TripIt Pro Subscription

All your travel plans, in one place

Get a master itinerary for every trip

Available on Android and iOS

Link your Concur and TripIt accounts and get:

- A free subscription to TripIt Pro from your company
- Real-time flight alerts
- Travel plans synced between Concur and TripIt

TripIt supports the following languages:

- English
- UK English
- French
- German
- Japanese

Create a TripIt account and connect to Concur

Email Address

jovu@fullerton.edu

Choose a New Password

••••••••••

Must have at least 8 characters

Country/Region Of Residence

United States of America

I accept the TripIt [User Agreement](#), have read the [Privacy Policy](#), and agree to link the TripIt account to Concur.

Create TripIt Account

I already have a TripIt account! [Sign in and link my accounts](#)

How to Access * and connect TripIt through your Computer



Your TripIT Pro
Subscription is linked

Your accounts are linked!

All your travel plans, in one place

Your TripIt account is now linked to your Concur account.

- Trips booked in Concur Travel will be organized in a master itinerary in TripIt and available through the TripIt app.
- Travel plans added to TripIt will sync to Concur.
- Uncheck the "business" flag for personal trips so they don't sync to Concur. TripIt will still monitor your flights and provide notifications for these trips.

Continue

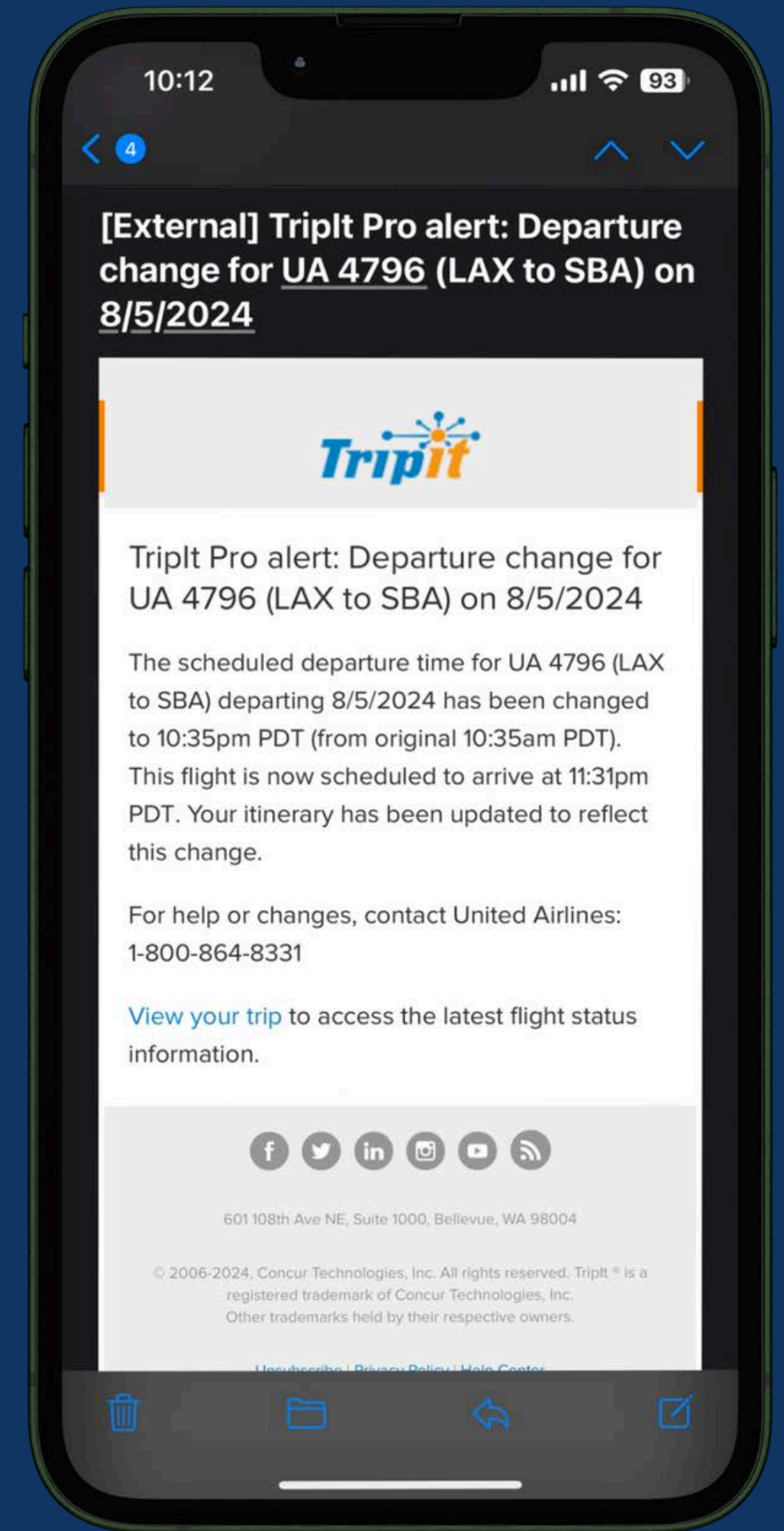
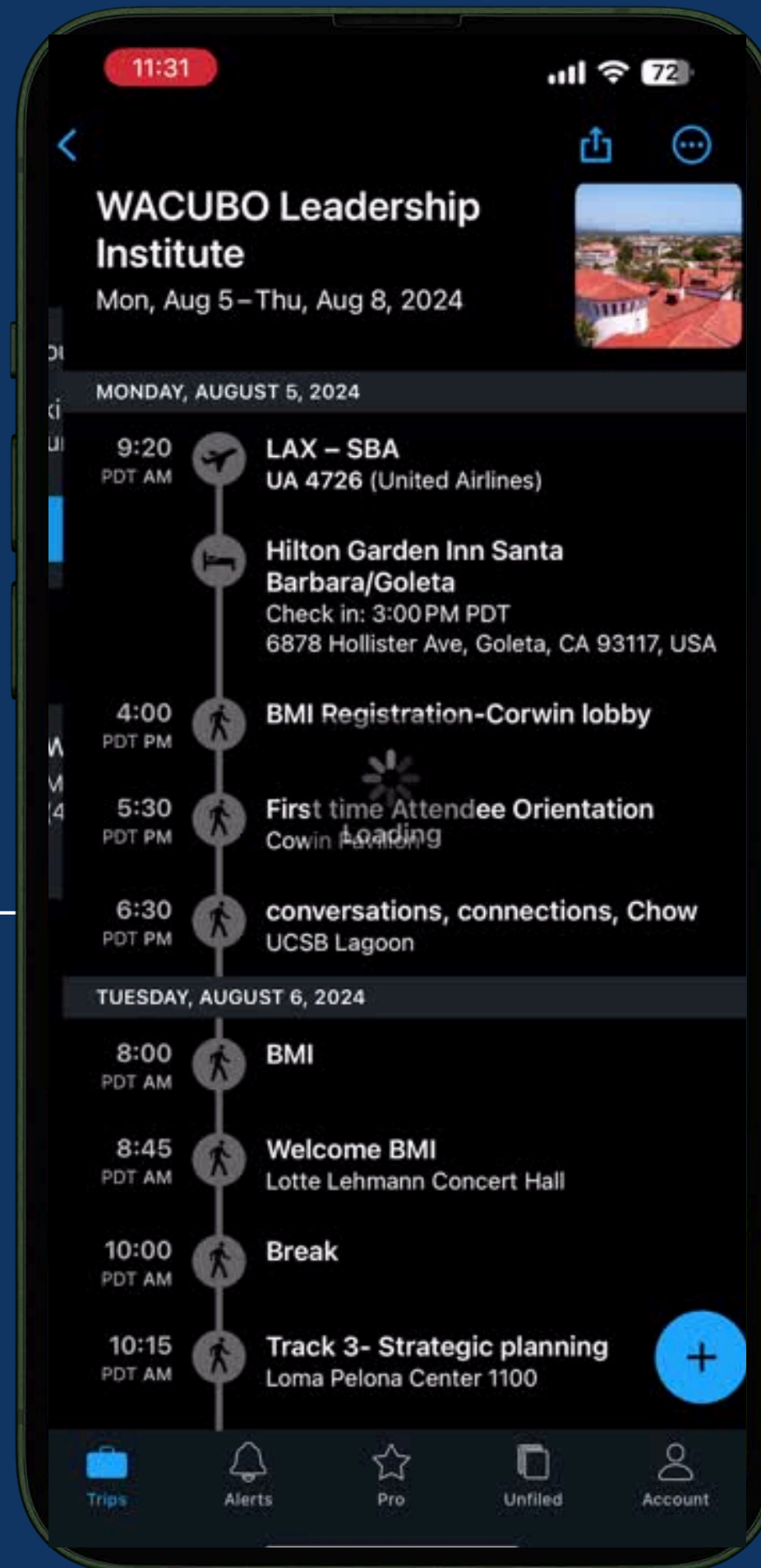
[Get the TripIt app on your phone](#)



How to Access and connect TripIt



My Itinerary on TripIt



How to Access * *and Download TripIt*

☑ *Your turn...*



4

Creating, Approving, and Submitting in the App

Why the Concur App *is Useful*



You can save time by approving and submitting reports on the go

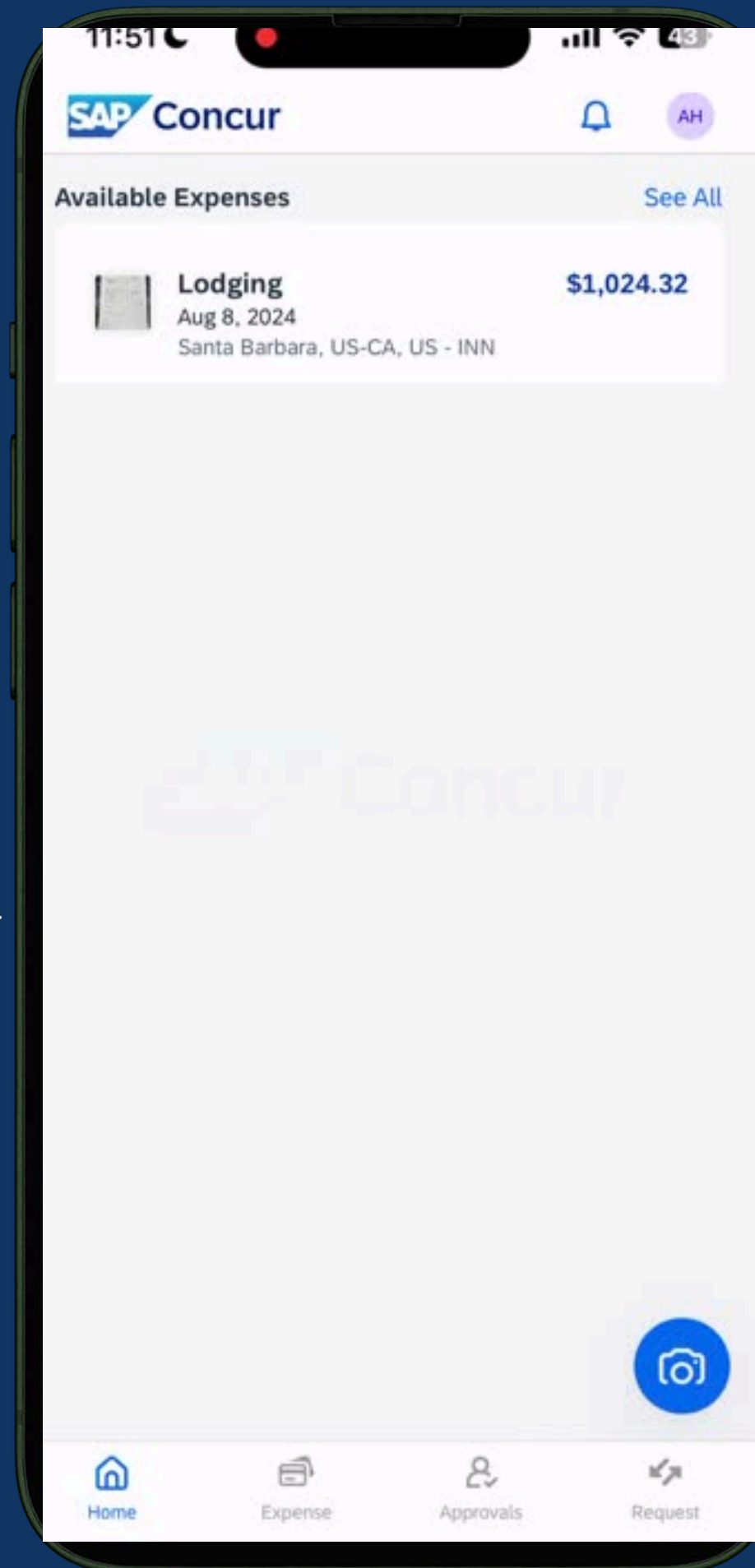


Get a head start and get ahead of having to wait

How to Create + Approve + Submit



Add your receipt to an Expense and submit when all expenses are entered



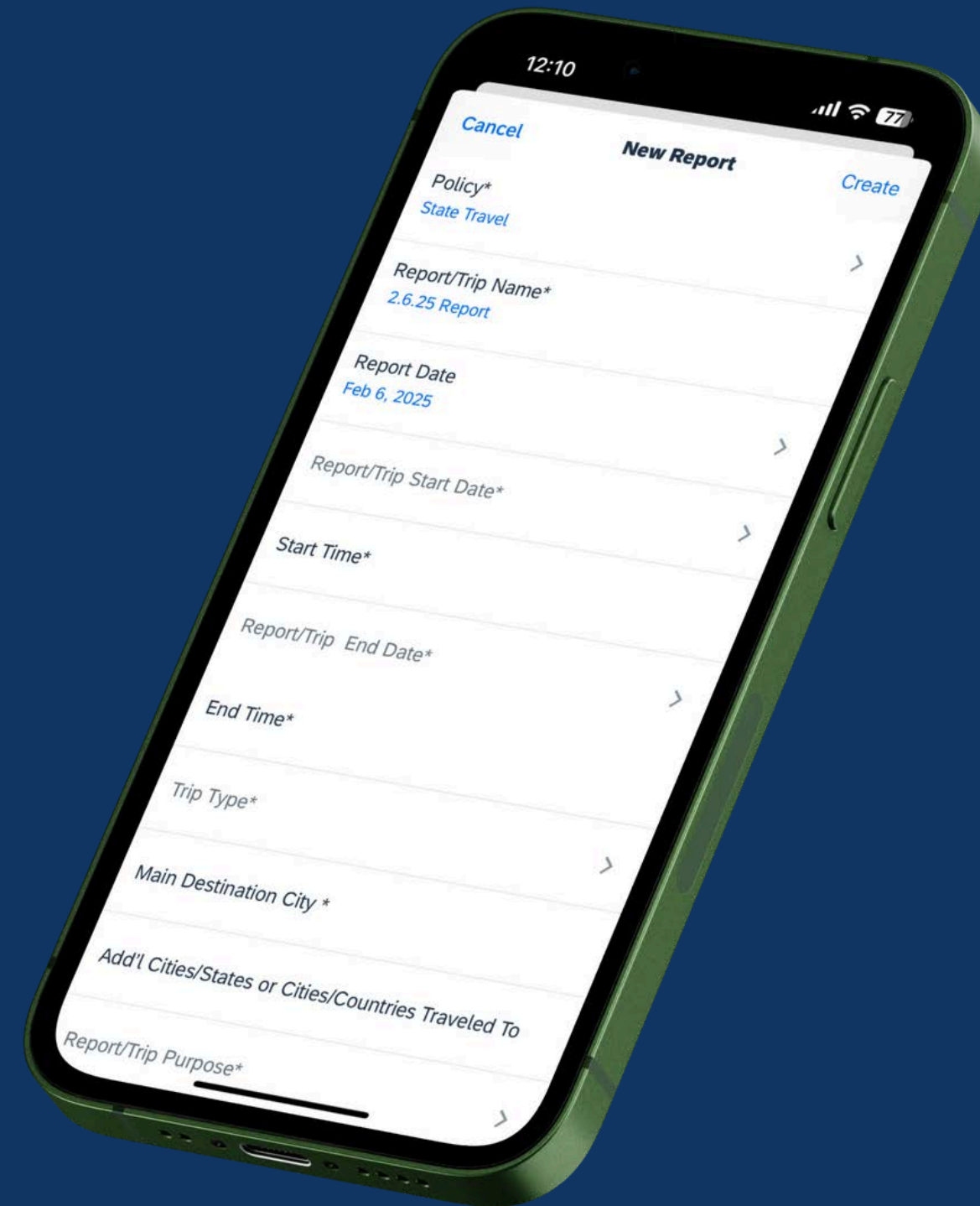
How to



*Create + Approve +
Submit*



Your turn....



5

Uploading Receipts/Files/Pictures

Why the Concur App
is Useful



Saves time from having to scan upload and download Receipts.



Users and delegates can take advantage of the New AI

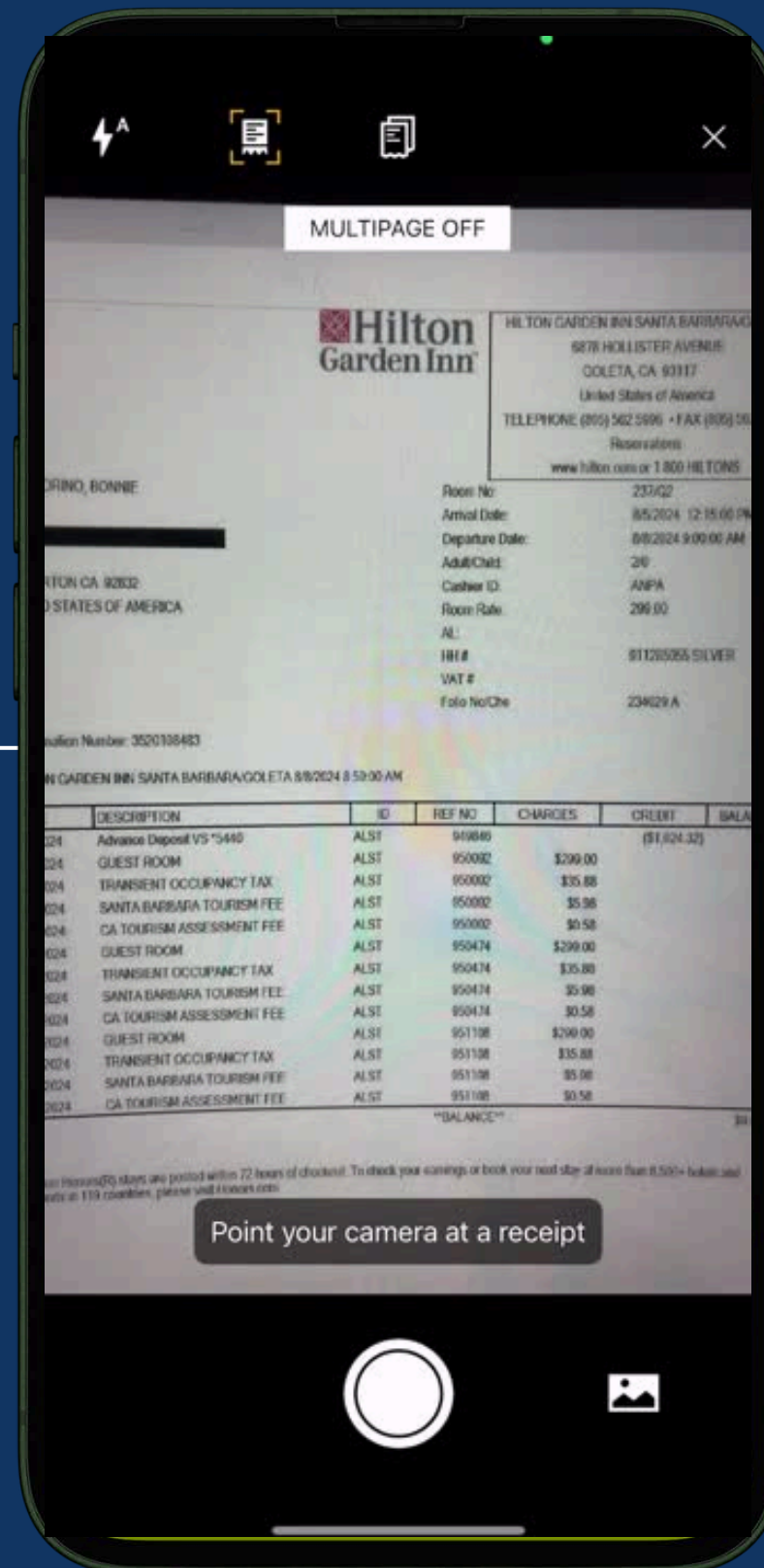
How to Upload a Receipt or File and Take a Picture



Click "SAP Concur
App"



From Home Screen
Hit Expense, you can
take a picture below



How to Upload a Receipt or File and Take a Picture



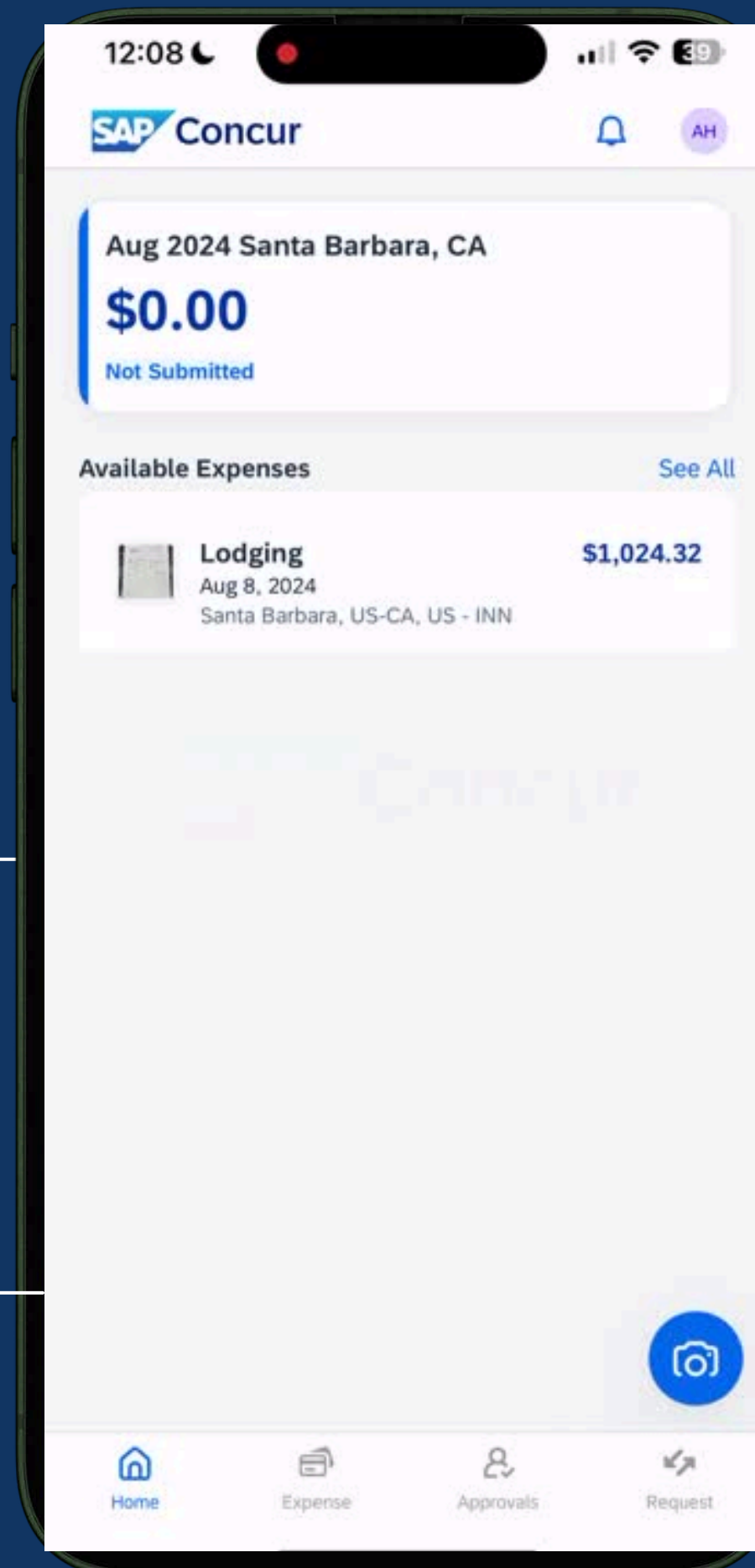
Click "SAP Concur App"



Or you can navigate to the + Sign on the top right corner of the screen to take or upload a photo and upload a file

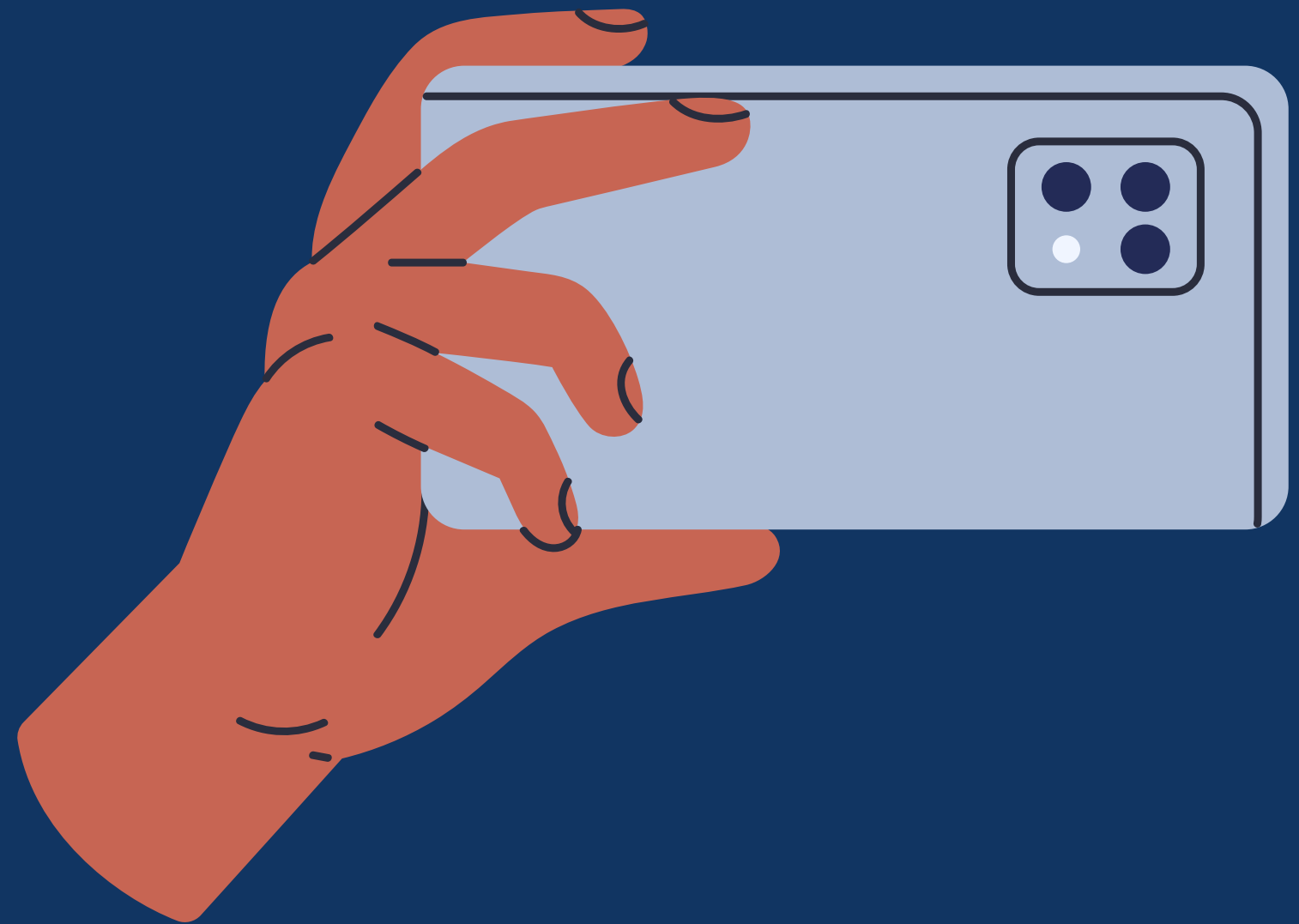


Once Upload Completes, you will see the expenses and pictures listed



How to Upload * *a Receipt or File* *and Take a* *Picture*

 *Your turn....*



How to Delete *
our TEST Expense Report

Your turn...



6

Sign up for Direct Deposit

Why Direct Deposit *is Useful*



Save time waiting
for a check
reimbursement



If your address has
changed, you do not
need to update with
HR and Financial
Services

How to Sign Up for Direct Deposit



Can go through the Concur Portal under Read More and scroll down to TRAVEL REIMBURSEMENT...Click Direct Deposit

The screenshot shows the SAP Concur portal interface. At the top, there is a navigation bar with 'SAP Concur' and 'Home' dropdown. Below this is a dashboard with three main sections: 'Create' (with a dropdown arrow), 'Authorization Requests' (0), and 'Available Expenses' (2). To the right, there are 'Expense Reports' (2). The main content area features the 'CALIFORNIA STATE UNIVERSITY FULLERTON' logo and a 'Company Notes' section. This section contains several updates and reminders:

- FOR MORE INFORMATION ON UNIVERSITY TRAVEL UPDATES**
CLICK ON [READ MORE](#)
- UPDATES**
 - 01/07/2025 - [Mileage Reimbursement Rates Effective January 1, 2025](#)
 - 10/01/2024 - [General Services Administration \(GSA\) Meals and Incidentals Per Diem Rate Increase Effective October 1, 2024](#)
 - 09/15/2023 - [Repeal of Travel Ban](#)
- CONCUR FISCAL YEAR END BLANKET TRAVEL REMINDERS**
Here are some reminders regarding blanket travel requests in Concur:
 - Blanket Travel Request for FY 24/25**
 - A new blanket travel request for FY 24/25 must be submitted and approved prior to any blanket travel taking place in the new fiscal year
 - All expenses incurred beginning July 1, 2024 must be linked to the approved FY 24/25 request
 - Go to [Blanket Travel Request Instructions](#) for instructions on setting up a new blanket travel request in Concur
 - Blanket travel may only be used for parking and mileage
- If you have any questions, please contact Travel Operations at travel@fullerton.edu.
- TRAVELERS HOME ADDRESS**
Send an email to travel@fullerton.edu to update the traveler's home address in the Accounts Payable System.
- PROCUREMENT CARD BILLING CYCLE DATES**
The Procurement Card Billing Cycle Dates:
 - 24 -2025
 - July 6/26/2024 - 7/25/2024

How to Sign Up for Direct Deposit

Fill out the Form



Powered by Adobe Acrobat Sign

Please sign: StaffAndFacultyReimbursementDirectDepositAuth

**CALIFORNIA STATE UNIVERSITY, FULLERTON
ACCOUNTS PAYABLE/TRAVEL
STAFF AND FACULTY REIMBURSEMENT
DIRECT DEPOSIT AUTHORIZATION**

Completed Date: Feb 5, 2025

Start Check One: New Setup Change Cancellation

TYPE OF ACCOUNT Checking

Bank Name Branch

Bank Address

City State Zip Code Phone

Bank Routing No. Account No.

I hereby authorize in accordance with the rules and regulations of the National Automated Clearinghouse Association ("NACHA") California State University, Fullerton to credit any reimbursements due to me via automated clearinghouse electronic fund transfer ("ACH") to the bank and bank account owned by me referenced above. Further, I hereby authorize CSU Fullerton to withdraw funds from the above referenced bank account owned by me via ACH debit. Such debits are authorized only to perform legitimate and appropriate financial transactions between me and CSU Fullerton including, but not limited to, retrieval of reimbursement overpayments. This authorization will remain in effect until cancelled in writing. A new authorization must be completed if I change my bank account, close my bank account, or change financial institutions.

How to Sign Up for Direct Deposit



Fill out the Form and attach a Bank Memo or a VOIDED check to travel@fullerton.edu

Please sign: StaffAndFacultyReimbursementDirectDepositAuth

Signature: [Click here to sign](#)

Email: [* Enter your email address](#)

Employee Print Name **Employee Signature**

CWID

Work Phone Home Phone

Home Address

E-mail Employee's fullerton.edu address E-mail One additional fullerton.edu address may be added

Privacy Notification
The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information about themselves. The principal purpose for requesting information on this form is to acquire authorization for reimbursement distribution to a financial institution of the individual's choosing. Furnishing all information on this form is mandatory. Failure to provide such information will delay or may even prevent completion of the action for which the form is being submitted.

Attachments
A voided check or letter from your bank showing name and address of account holder, bank account number and routing number must be attached.

[* Click to Attach Document](#)

AP USE ONLY:

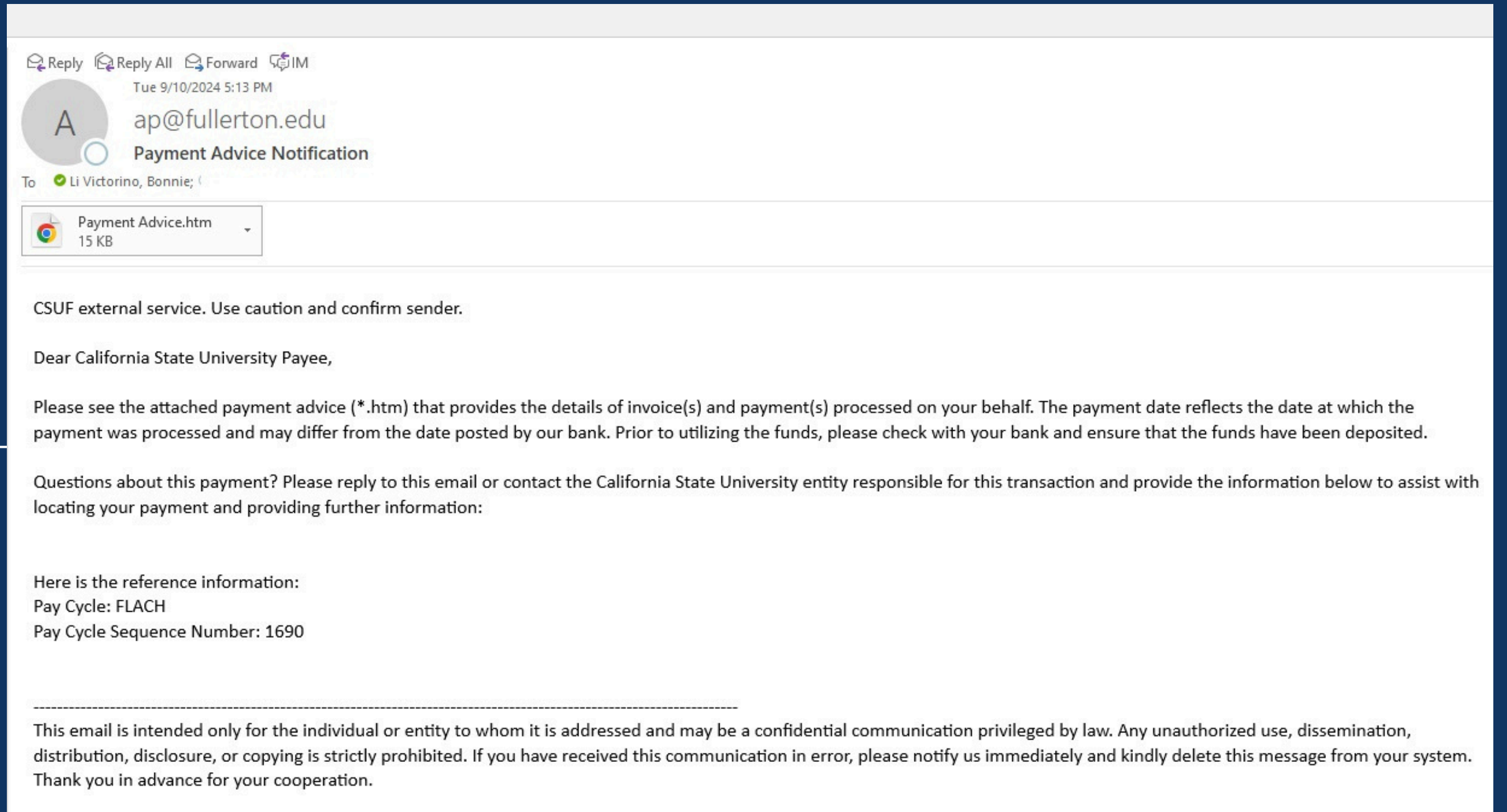
Vendor No. Entered By Approved

Questions? travel@fullerton.edu | Rev. Date 08/2021

How to Sign Up for Direct Deposit



When you are set-up and your reimbursements come in, you will receive an email from:
ap@fullerton.edu



How to Sign Up for Direct Deposit



This is the attached
Direct Deposit Advice
in the E-mail

An Image 10 September 2024 17:12:40 PM

Payment Advice

Page 1 of 1

To:
Supplier Name: BONNIE LI VICTORINO
Supplier Address: FULLERTON CA, 92832
USA

Payment Information
Payment Reference: 020772
Payment Date: 09/09/2024
Payment Method: Electronic Funds Transfer

| Bank ID | Bank Name | Branch ID | Branch Name |
|---------|------------------|-----------|-------------|
| | WELLS FARGO BANK | | WELLS FARGO |

Bank To Information:
Bank To Account: 00XXXXXXXXXX:

Please email ap@fullerton.edu, if you have any questions

| Invoice Number | Invoice Date | Voucher ID | Gross Amount | Discount Taken | Late Charge | Paid Amt |
|----------------|--------------|------------|--------------|----------------|-------------|------------------|
| 62593 | 08/08/2024 | 00276528 | 87.00 | 0.00 | 0.00 | 87.00 |
| Total: | | | 87.00 | 0.00 | 0.00 | 87.00 USD |

Important *

*If your address changes and you have a
Check Reimbursement*

1 *Change your address with HR*

2 *Change your address with Accounts Payable:
ap@fullerton.edu*

The two systems DO NOT Talk

Important *

*If your bank changes and you have a
Direct Deposit*

1 *Change your Account and
Routing Number with HR*





2 *Update/Change/Cancel your Account and
Routing Number by completing a Direct Deposit
Form*

The two systems DO NOT Talk



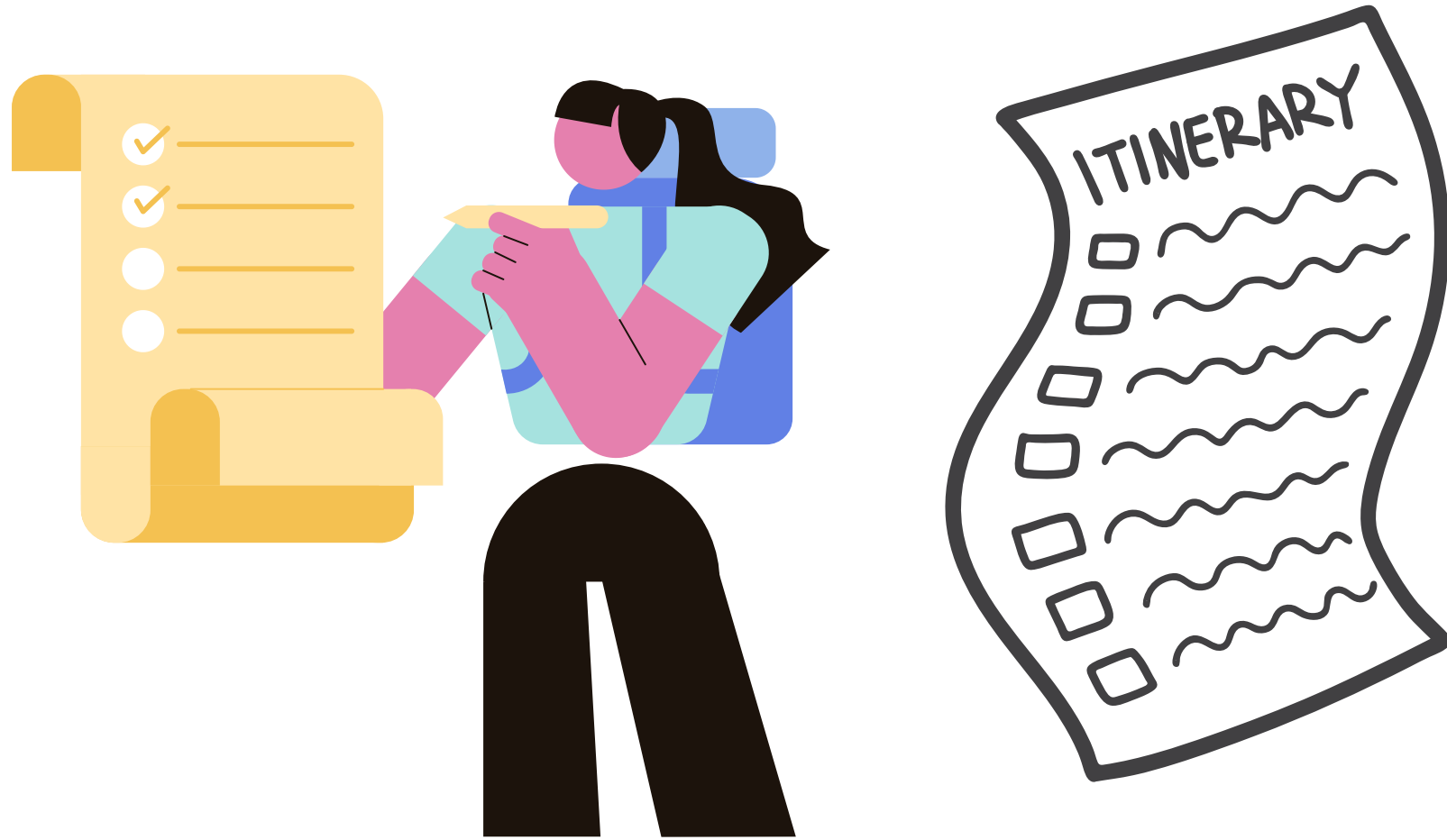
Set a Realistic *Goal to Save time*



-  Use the SAP Concur Mobile App
-  Create your Expense report before you Leave
-  Take pictures, upload expense receipts on the go
-  Use Triplt to monitor changes in travel or create itineraries



Uploading Expense Receipts/Reconcile



Be prepared, *to Travel*



A well-prepared traveler is a confident traveler.
Protect yourself, be prepared, and enjoy every trip
without worry!



Enjoy *Your Trip*

**Financial Services
Spring 2025 Training Survey**



Select the training you attended and complete survey questions.

Thank you from Financial Services!

*Select "Essential Tips and
Tricks: Concur App Basics"*

[Click here for the Link](#)

Upcoming Training

Continue the Learning Journey (In-Person)



<https://financialservices.fullerton.edu/training/>

Mastering Concur Travel

Reconciliation:

Thursday, March 13

10-11:30 am

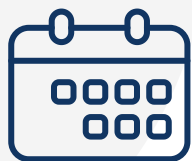


Mastering Concur P-Card

Reconciliation:

Thursday, April 24

10-11:30 am



Mastering Concur and P-

Card Reconciliation:

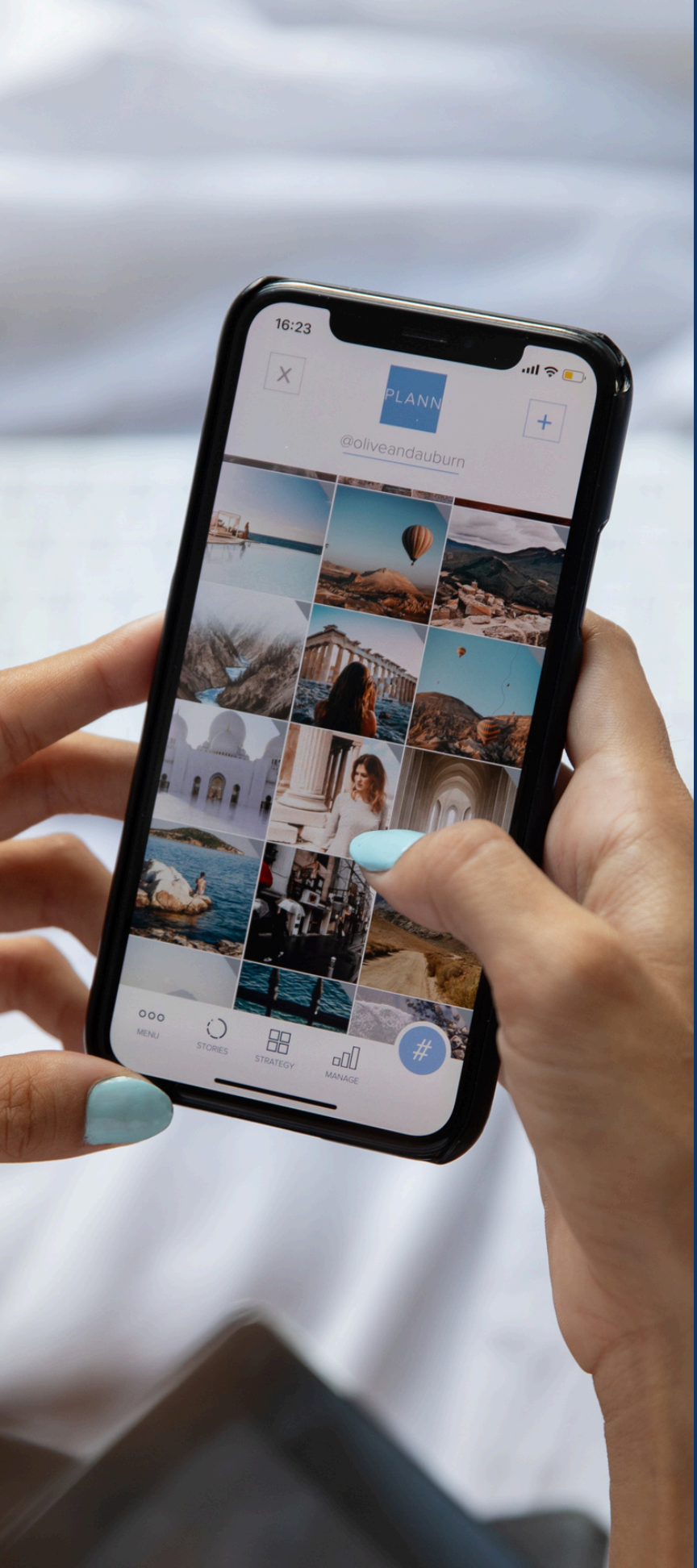
Thursday, May 8

10-11:30 am



CSUF

**Academic
Financial Services**
ADMINISTRATION AND FINANCE



Staying Connected *and Thank You*



 Contact us at Academic Financial Services

 Accounts Payable and Travel

Travel@fullerton.edu

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