## Getting Started & Profile Updates

Kennesaw State University has chosen to use Concur to manage travel and expense processes. KSU Travel policy requires the use of Concur to manage employee travel authorizations, bookings, and expense reporting.

## Access to Concur

Access to Concur should be requested when the employee is first informed, they will be traveling. Due to policy, request to access Concur should be made at least 17 days prior to air travel. The traveler should check with the Business Manager or Department Chair to confirm their default Speed Chart and Department Budget Numbers. Please click here to request access to Concur. Note: This request will take 48 – 72 hours to complete.

## Profile Set-Up

### Verify/Update Personal Information & Travel Preferences

» Login to the Concur website at: Concur Solutions.
» Enter the user ID and password information provided to you by the KSU travel administrator. Note: Remember that your user ID ends in @ksu.
» If you are unable to access the system, submit a service request via service.kennesaw.edu/ofs or call 470-578-4394.
» At the top right-hand side of the Concur page, click Profile and then Profile Settings.
» Click Personal Information (Company Information (Employee ID) will be auto-populated).
» Work Address: Your Company Name will default to State of Georgia. In the search for company locations field, enter Kennesaw State University and click the correct address for your work location. Then click the check box, address same as assigned location. KSU address will automatically populate.
» Home Address is populated using information from Human Resources. Do not change in Concur. If you have an address change, please update this information through Human Resources and the travel system will update automatically within 48 hours.
» Verify and Update Contact Information, if necessary. Note: Please enter a cell phone number.
» Enter any necessary information in Travel Preferences. Frequent Traveler Program information may be entered here. Click Save after all programs are entered.
  Note: TSA Secure Flight information MUST be updated.
» Enter the required passport information under the International Travel section if you plan to travel internationally.

» Check the following three areas below to confirm your Default Manager/Approver and Speed Chart.
  o Under Company Information confirm the Manager (your default Approver) and Speed Chart.
  o From the My Profile menu on the left, under Request Settings, click Request Approvers. Confirm the Default Approver is same as the Manager on the Company Information section.
  o From the My Profile menu on the left, under Expense Settings, click Expense Approvers. Confirm that the Default Approver for expense reports and cash advances is same as the Manager on the Company Information section.

### Change in Department or Speed chart

If the traveler is moved to a new department or speed chart, please click here to update the speed chart in Concur.

Contact the Travel Hotline at (470)578-4394 or submit a service request via service.kennesaw.edu/ofs with any questions.

### Set up Personal Vehicle Information

» At the top right of the Concur home page, click Profile and then Profile Settings.
» On the Expense Settings menu on the left side of the page, click Personal Car.
» On the Personal Car Registration page, click New.
» In the Vehicle ID field, enter "PERSONAL CAR-TIER 1" as the name.
   Note: Tier I Rate is used when it is determined that a personal vehicle is the most economical form of transportation.
» Click on the Vehicle Type drop down arrow and choose Car – Tier I. Marked Preferred Car.
» Click Save.
» If a Tier II Rate is used Repeat 1-5 (replacing the 1 with 2).
   Note: Tier II Rate should be used when another form of travel is most economical, but personal car is used.

### Add an Expense Delegate

Expense Delegate: an individual(s) authorized by the traveler to prepare and track expense reports on their behalf.

Delegates cannot submit reports.

» At the top right of the Concur home page, click Profile and then Profile Settings.
» On the Expense Settings menu on the left side of the page, click Expense Delegates.
» On the Expense Delegate page, click Add
» In the search by employee name, email address or logon ID field, type the last name of the delegate you wish to add.
» From the list of matches, select the appropriate person. Click Add.
» Check the boxes for the responsibilities you wish this delegate to perform on your behalf.
» Click Save.

### Delete an Expense Delegate

» At the top right of the Concur home page, click Profile and then Profile Settings.
» On the Expense Settings menu on the left side of the page, click Expense Delegates.
» Click on the box to the left of the name of the Delegate you would like to delete.
» Click Delete
» Click Save.

### Setting Up Email Notifications

From the Concur home page, click on the Profile option. Select the System Settings link.

» Set or change your email notifications as follows:
   o Email Notifications
      ▪ For approvals, select the desired check boxes:
         • Send an email every time something is put in or removed from my approval queue
         • Send a daily summary of items in my queue
         • Let me know when one of my requests is approved or denied
      ▪ For other emails, select the desired check boxes:
Note: Unchecking (clearing) any of these check boxes will not stop emails to your assistant or arranger if you use one.
         • Send Confirmation Emails (any time you book travel)
         • Send Trip-on Hold Reminder Emails (any time you place a trip on hold)
         • Send Ticketed Travel Reminder Email (when a trip you have booked is ticketed)
» After all email preferences are set, Click Save.


Contact the Travel Hotline at (470)578-4394 or submit a service request via service.kennesaw.edu/ofs with any questions.