SAP Concur Travel: Updating Your Profile

Use this guide to help you update your profile via Concur Travel.

Accounts Payable & Travel

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Overview

The SAP Concur Travel online booking tool delivers the broadest selection of travel content through an intuitive and easy-to-use online travel booking experience. Corporate Travel Planners (CTP) is the preferred vendor for airfare purchases. When creating a travel booking in the SAP Concur system, the reservation and invoice is processed through CTP. Please note, Travel Assistants will be referred to as Travel Arrangers in SAP Concur Travel and Proxys in SAP Concur Expense.

For employees of Texas State University, the traveler profile will be pre-populated with the basic data to book travel. However, you will need to do a one-time entry of: Profile Information, Traveler Preferences, TSA Secure Flight Data and Travel Assistant/Arranger.

Upon your first login to SAP Concur, employees of Texas State University will need to complete their travel profile before booking for themselves or booking on behalf of others. The “Required” fields in the profile are the priority items to complete, which include contact information and TSA Secure Flight data. The SAP Concur profile houses your personal travel preferences and travel reward program numbers. Once information is entered and saved, the data will automatically be added to your bookings whether reserved through SAP Concur or a CTP agent. These instructions are for required and optional fields, you do not have to enter any additional information if you choose not to.

Profile Information

1. Select Profile then Profile Settings from the top header on the right side of the SAP Concur Home Page.

2. Select Personal Information.

3. Complete each section of your profile, then select the Save button at the end of the My Profile – Personal Information (after Credit Card field).
a. If only completing a certain section of the profile, use the **Jump To** drop down to maneuver through the fields.

### Name

Verify that this information appears as it does on your government issued photo ID. If the ID information does not match the ticket information exactly, the traveler may be delayed or be turned away at the gate. First, Last and Middle names are required fields. If there is no middle name to enter, check the box **No Middle Name**.

### Work Address

The work address fields are optional. The Company Name will be populated.
Home Address

The home address fields are optional.

Contact Information

You must specify at least one Phone Number, either Work or Home Phone.

Email Addresses

This field allows you to add an email address (as many as you want) to receive copies of your travel itineraries at alternate email addresses.

**NOTE:** All itineraries booked through SAP Concur Travel (CTP) will be automatically forwarded to On Call International (On Call) for duty of care services and foreign insurance coverage for the university.
Emergency Contact

The emergency contact fields are optional. If you complete this, remember to enter the same information you input in the Duty of Care provider system (On Call International). This information may be helpful during an emergency, as the person listed can be contacted if the traveler can’t be reached. Choose someone who can answer questions or possibly has alternatives for reaching the traveler.

Traveler Preferences

If you have travel reward programs or specific travel preferences, you can include these in your profile. This information is used for preferences such as frequent flyer programs, hotel points, airlines (e.g., window, aisle, no exit row, etc.), hotel (e.g., high floor, not by elevator, king bed, etc.), vehicle (e.g., no red or silver cars). These preferences can be modified at any time. If you use preferences, you will have less data to enter when completing future bookings.

**NOTE:** Early Bird Check-In, or Preferred Seating requires Cabinet Officer approval. The President’s approval is required if the traveler is a Cabinet Officer.

Discount Programs

1. Select any of the applicable discount programs you are a member of.
2. Select your flight preferences from the dropdown menu for: **SEAT, SEAT SECTION, SPECIAL MEALS** (long flights only).

![Air Travel Preferences dropdown menus](image)

**NOTE:** If you travel on flights providing meals, you can complete the Special Meals preference.

![Special Meals options](image)

3. Enter your **Preferred Departure Airport.** Begin typing the city name or airport’s three-digit code in the text box and the system will search the airport that matches the typed information. Select the correct airport once it is listed.
3. Enter any other information/preferences to be communicated to the CTP agent in **Other Air Travel Preferences**.

4. Enter any medical allergies or special instruction in **the Medical Alerts** box.

5. Select your hotel preferences from the dropdown menus for: **Room Type, Smoking Preference, Message to Vendor** (can input requests such as “high floor,” “not by ice machine,” etc.).

6. If applicable, click the boxes under the **Accessibility Needs** area.
Car Rental Preferences

7. Select your Car Rental Preferences from the dropdown menu for each of the following options: Car Type, Smoking Preference, Car Transmission In-Car GPS (Note: if you have this in your preference you will receive this feature every time you rent a vehicle and be billed for the service). You also can input data in Message to Car Rental Vendor such as “no red car”, etc.

Frequent-Traveler Program

If you have a frequent-traveler program membership(s), you can include these in your profile. You can add as many programs as you want but can only enter five programs at a time. Then you must SAVE and start over to add additional programs. Once you have added frequent traveler information in your profile, these numbers will be automatically added to all bookings made in SAP Concur Travel or with a CTP agent.

NOTE: When entering program numbers exclude any spaces and/or special characters.

8. Select Add a Program.

9. Select the program type(air/car/hotel), select the vendor. Enter your program number for each program type.
   b. AIRLINES: Select the plane icon, then the carrier from the dropdown box. The super carriers are highlighted at the top of the dropdown list. You may have to scroll down to find your carrier.
Next, enter your **Frequent Flyer Number** in the field on the right of the screen. Click **Save** when complete or **Cancel** to exit selection. Repeat if you have more than five programs.

**Add Travel Programs**

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

- **HOTELS**: Select the bed icon, then the hotel from the dropdown box. The large chains are highlighted at the top of the drop-down list. You may have to scroll down to find your hotel. Next, enter your **Frequent Guest Number** in the field on the right of the screen. Click **Save** when complete or **Cancel** to exit selection. Repeat if you have more than five programs.
c. **CAR RENTAL:** NOTE: This option may be available in the future but can be ignored at this time. You cannot complete car rentals through CTP unless you plan to pay for it personally at the time of pickup. Continue to book vehicles through the SAP Portal.

**Advantage Programs**

If you have any advantage program membership(s), you can include these in your profile. You can add as many programs as you want but can only enter five programs at a time. Then you must **SAVE** and start over to add additional programs. Once you have added advantage program memberships in your profile, these numbers will be automatically added to all bookings made in SAP Concur Travel or with a CTP agent. **NOTE:** When entering program numbers exclude any spaces and/or special characters.

10. Select **Add a Program**
11. Select the program type (air/car/hotel), select the vendor. Enter your program number for each program type.
   
   a. The following screen will appear. Select a carrier, select the Advantage Program, enter the number excluding any spaces and/or special characters, and expiration date. Click **Save** when complete or **Cancel** to exit selection. Repeat if you have more than five programs.
Unused Tickets and Southwest Ticket Credits

SAP Concur Travel will list any ticket credit that may be used by the traveler in the **Unused Tickets and Southwest Ticket Credits**. Information will be located within the profile if any unused tickets from previous bookings are available. You can apply unused ticket credits in your profile to your next booking.

<table>
<thead>
<tr>
<th>Carrier</th>
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<th>Notes</th>
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<td>12/30/2019</td>
<td>UA</td>
</tr>
</tbody>
</table>

TSA Secure Flight Data

Information required by TSA will need to be entered in **TSA Secure Flight** and will need to reflect exactly what is listed on the traveler’s government issued photo ID. Gender and Date of Birth are both required elements for this section and for airfare reservations. Once you enter your Date of Birth, it will be masked with asterisk symbols (ex. **/**/****) for security purposes. If you have a Redress # or TSA Pre-check (Known Traveler Number), please add it here. If the identification information does not match the ticket information exactly, the traveler may be delayed or be turned away at the gate.

Assistants and Travel Arrangers

The Travel Assistant role is an employee, authorized to perform all travel activities required to create, change and save travel itineraries, requests and expenses on the employee/traveler’s behalf. A Travel Assistant is also referenced as a Travel Arranger in SAP Concur Travel and a Proxy in SAP Concur Expense. It is possible to have more than one Travel Assistant listed.

1. You can assign a Travel Assistant/Arranger [Proxy] by selecting +Add an Assistant. A pop up will appear.
NOTE: For each assistant you wish to assign, repeat the steps.

2. Begin typing the assistant’s name in the Assistant field. Once the name is located, click on it to select it.
   
   NOTE: The Travel Assistant’s name will display additional information so you can ensure you are selecting the correct person (i.e., multiple staff with the same name).

3. Select Can book travel for me and/or Is my primary assistant for travel.
   
   NOTE: You can only have one primary assistant. The primary assistant will receive all travel communication (emails) regardless of who booked the reservation (i.e., a different department books travel for the employee, the primary assistant will receive a reservation email).

4. Verify the Assistant’s name listed and select Save.
5. Name selected will be listed under Assistants and Travel Arrangers. Select Save to complete the process.

Credit Cards
SAP Concur Travel is for business use only and personal credit cards cannot be added. If you wish to book a personal trip, you will need to contact a CTP agent directly and provide your payment information.
Once you have added all traveler information in your profile click **Save** to finalize all entered data, **Cancel** to delete any unsaved data or **Go to top** to review all profile entries. These numbers and information will be automatically added to all bookings made in SAP Concur Travel or with an agent.