

Concur Initial Login Checklist

This checklist is designed to help you with your Concur housekeeping so you can be on your way to automated travel and expense in no time! NOTE: Some of the information is uploaded from Colleague and can't be changed and some will be entered by you.

1. Log in to using "Sign in with SJECCD Secure Login" option, not "password" option.

< Sign In

[judyanwessler@sjeccd.edu](#)

Sign in with SJECCD Secure Login

[Sign in with your password](#)

2. Click on the Profile tab, then Profile Settings. Follow the menu on the left-hand side.

Personal Information:

- **Confirm that the spelling of your name matches your government issued ID.**
- Enter or Confirm Home Address and Contact Information.
- **Enter or Confirm Work or Home phone. *Required if using Concur Travel.***
- Email Addresses - must use work email as primary to receive notifications.
 - **Select VERIFY to enable your Concur account to receive receipts sent from your work email address. *Highly Recommended.***
- Enter emergency contact information for emergencies during travel.
- Enter Travel Preferences which will integrate with Concur Travel Store.
- **Enter Passport and Visa information or check I Do Not Have a Passport. *Required if using Concur Travel.***
- **No need to add Travel Arrangers – they are already authorized.**
- **DO NOT enter credit cards information.** Personal credit cards are not allowed for booking through Concur Travel Store.

Expense Settings:

- **Expense Information:** User Group and GL are uploaded from Colleague and can't be changed. If this information is wrong, contact your Business Services office.
- **Expense Delegates:** Add delegates who can act on your behalf to enter Requests, Expense Reports or preview Approvals. Usually your Administrative Assistant or Department Admin. *Be sure to check the boxes for granting permission. Eg: Can Prepare, Receives emails.*
- **Managers:** for vacations, you can set up a temporary Approver here. **Expense Preferences:** Set email preferences. DO NOT select Prompt for an approver...
- **Approvers:** Confirm your uploaded BI Manager and Expense Report and Request Approvers. *If these are incorrect, notify your Business Services office.*
- **Favorite Attendees:** Attendees are not used at SJECCD.

Other Settings: Optional, but some are useful.

- **Activate E-Receipts:** Allows vendors to email receipts directly to your Concur account.
- **System Settings:** Additional email preferences
- **Connected Apps:** Mobile App, vendor apps for e-receipts, such as Uber or airlines.
- **Change Password**
- **Concur Mobile Registration** – to use Mobile app for approvals, expenses and receipts while on trips or out of office. *Highly Recommended for Travelers.*