



Quick Reference Card: User Profile Settings

Getting Started

- Login to usd-ctp.com
- Click the tab Login to Torero Travel & Expense.
- Enter your @sandiego email address and USD One password

Review and Complete Your Profile

- From the Concur homepage, click **Profile**, then **Profile Settings**.
- Complete the following Information.

Personal Information

Name: **Required**

- First and Last Name will be populated from your HR record.
- Add Middle Name and, if applicable, Suffix to **match your government issued photo ID which you will present to airport security**.

NOTE: If name information is incorrect, contact Human Resources.

Company Information: **Required** position title

Contact Information: **Required** work and/or home phone number

Verify Your Email Address: **Recommended**

- Click the **Verify** link.
 - A code will be sent from Concur to your @sandiego.edu address.
 - Copy the code from the email message.
- Return to your profile and paste the code you received into the **Enter Code** box, then click **OK**.

NOTE: Your “@sandiego.edu” email address has already populated your profile. Verifying your email address allows you to:

- Email your receipts to receipts@concur.com
- Forward travel plans to plans@concur.com

Emergency Contact:

- Enter the contact information for your emergency contact.
- If your emergency contact’s address is different from your own, **uncheck** “Address same as employee”.
- Click **Save**.

Travel Preferences – optional, **Recommended for Frequent Travelers**

- Enter air, hotel, and car rental preferences.
- If you participate in Frequent Traveler Programs, click **Add a Program**.

TSA Secure Flight

- Gender and Date of Birth will auto populate.
- If you have a TSA Pre-check number, it can be entered.

International Travel: **Passports and Visas – Recommended for International Travelers**

- Entering passport and visa information in Profile, allows it to be available when booking travel.
- Enter passport/visa information and click **Save**.

Credit Cards

- Your USD One Card will be auto-loaded into your Profile. The display name is “USD One Card”.
- A personal credit card can be entered but will not be available to use for airfare purchases.
- Click **Save**.

Request Settings: Optional (infrequently used)

- Information, Delegates, Preferences, and Approvers are shared between **Request** and **Expense Settings**.
- Start with **Request Settings** and the info. will carry through to **Expense Settings**.

Request Information

- A default departmental account number will automatically populate.
- If you want a Reference number to be part of the default number, it must be added here.

Request Delegates

- Click **Add**, then begin typing the individual's name and select their record from the dropdown list.
- Check off the functions you would like your expense delegate to perform on your behalf
 - Typically this includes prepare, book travel, submit requests, view receipts, receive emails.
- Click **Save**.

NOTE: Expense delegates can prepare, but cannot submit expense reports on behalf of the traveler. It is the responsibility of the traveler to add/delete delegates.

Favorite Attendees: optional

- Frequent attendees of Group Business Meals can be setup in the system ahead of time.
- Click New Attendee, enter required information, click **Save**.

Other Settings

E-Receipt Activation: **Highly Recommended**

Enables the auto collection of electronic receipts into the Concur application, from participating suppliers.

- Click **E-Receipt Activation** link.
- Accept E-Receipt Activation and Use Agreement.
- You will receive a confirmation that E-Receipts has been activated.

Connected Apps – **Highly Recommended**

TripIt Mobile App

- Locate **TripIt Pro** eligibility message on Concur home page, under Alerts.
- Click **Get It** link.
- Enter your @sandiego.edu email address, USD One password, and click **sign up**.
- **TripIt** will send a verification email to your @sandiego.edu email address. Click the link in the email to verify the account.

Concur for Mobile

Setup the traveler's mobile phone to capture receipts, submit expense reports, etc.

- Create a PIN, and click **Set PIN**.
- Download the Concur application to the traveler's phone, using the provided link, or by going to the App Store on the traveler's phone.
- Login to Concur via the phone, using the traveler's @sandiego.edu email and PIN as the password.
- Click **OK**, to allow Concur to send Notifications.

Your Concur Profile Setup is Complete!

Questions?

Contact Torero Travel and Expense:

Phone – 619.260.4197

Email – usdtravel@sandiego.edu

Website: <https://www.usd-ctp.com>