

Travel: Self-Registration

Travel Service Guide

Last Revised: September 17, 2019

Applies to Concur Travel:

- ☒ Professional/Premium edition
 - ☒ TMC Partners
 - ☒ Direct Customers
- ☒ Standard edition
 - ☒ TMC Partners
 - ☒ Direct Customers

Contents

Self-Registration	1
Section 1: IMPORTANT – About this Guide	1
Section 2: Overview.....	1
Professional and Standard Travel.....	2
Section 3: End-User Experience	2
Section 4: Self-Registration Approver Experience	2
Professional Edition.....	2
Standard Edition	3
Section 5: Configuration	4
Configuration – Professional Travel	4
Step #1: Activate the Feature	4
Step #2: Configure the Self-Registration Page	6
Step #3: Define the Travel Classes for Users to Select	9
Configuration – Standard Travel	10
Step #1: Create the Unique Registration Code and Email.....	10
Step #2: Configure the Self-Registration Page	11
Section 6: Self-Registration URLs	14
Add Language.....	14
Branding	15
Language and Branding Together	15
Section 7: Security	15
Section 8: Email Notifications.....	16
What the Admin Sees.....	16
What the User Sees	17
Section 9: FAQ.....	18
Questions	18

Revision History

Date	Revision Notes/Comments
July 25, 2023	Updated <i>Overview</i> section with note on SAP Concur UI themes; no other changes
January 14, 2022	Updated the copyright year; no other changes; cover date not updated
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
February 14, 2020	Updated the copyright; no other changes; cover date not updated
September 17, 2019	Updated: <ul style="list-style-type: none"> Self-registration is available only to Travel-only customers Approval is required for all self-registrations Screenshots for <i>Configuration – Professional Travel</i>, <i>Configuration – Professional Travel</i> and <i>Email Notifications</i> sections
June 20, 2019	Removed "Concur" from the cover; no other changes; cover date not updated
March 10, 2019	Updated the copyright; no other changes; cover date not updated
January 2, 2018	Updated the copyright; no other changes; cover date not updated
December 17, 2017	Added information about Self-Registration approvals
August 25, 2017	Added: <ul style="list-style-type: none"> The URL for clients using the EMEA data center The information for Standard Travel
June 26, 2014	Activation now completed by clients – not Concur – using Company Settings
April 2, 2014	General updates; moved to the new format

Self-Registration

Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur (if SAP Concur provides their support).

Section 2: Overview

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Self-Registration is a feature of Concur Travel that allows a client or TMC to use a client-specific URL that captures initial user information to create a new login (User Account) on the Concur Travel client site. This is an alternative to having an admin create a login on the site directly or using the Concur Travel Data Import tool to create new users. In other words, users create their own logins, within company-defined parameters.

! IMPORTANT: This feature is available **only** to Concur Travel-only clients.

TYPICAL USE CASE

Assume that an archaeological dig is organized, where several graduate students are expected to attend. The associated university may decide to use self-registration due

to the large number of students who may need access to the system. Self-registration would relieve the headache of managing the volume of requests.

Professional and Standard Travel

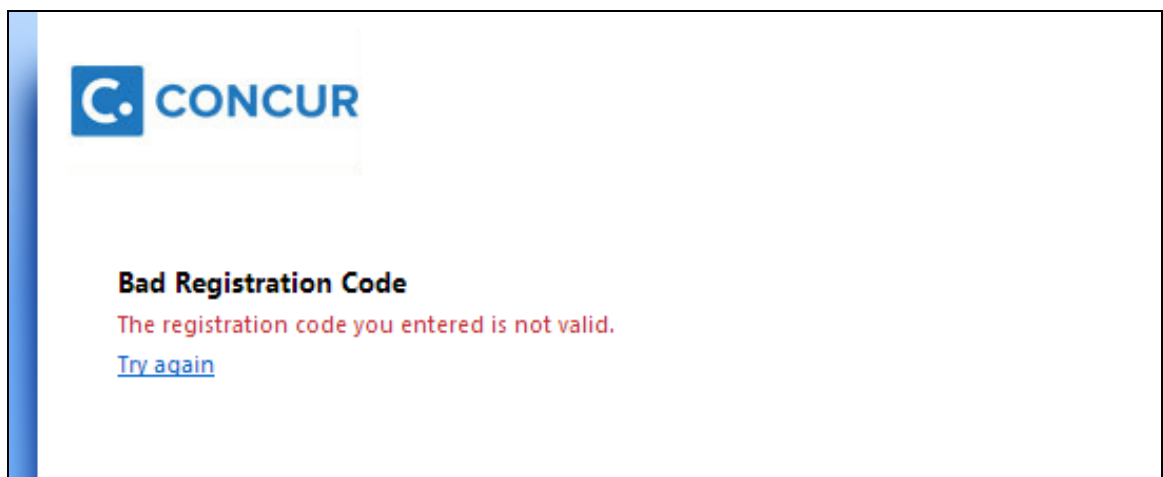
This feature is available to Professional and Standard Travel. The user experience is the same; the configuration steps differ between Professional and Standard.

Section 3: End-User Experience

Once configured, when the user enters the client-specific URL into a browser, the user sees the self-registration page.

The user completes self-registration page as instructed by their company. When they click **Submit**, this confirmation appears.

The user sees this message if the registration code they entered is incorrect:



Section 4: Self-Registration Approver Experience

The admin must review all registrations.

NOTE: Be aware that no registrant data is incorporated into Concur Travel until the registration is approved. If the registration is rejected, all registrant data is discarded.

Professional Edition

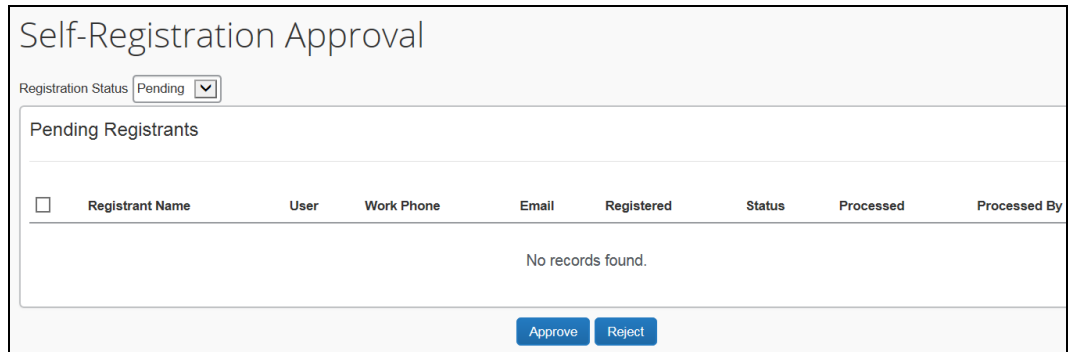
The approver must have the Self-Registration Approver (stand-alone) permission or the User Admin permission.

► **To review self-registrations:**

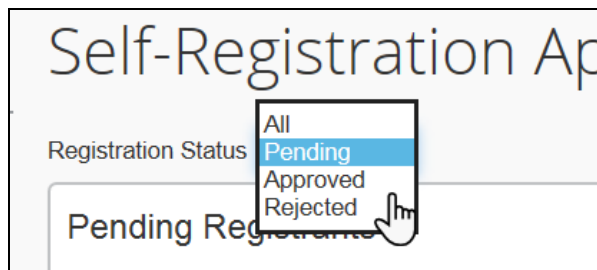
1. Click **Administration > Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. In the **User Administration** section of the left menu, click **Self-Registration Approval**. This page appears.



3. Pending requests appear by default. Use the **Registration Status** list to view all, approved, or rejected registrations.



4. Review the pending registrations and:
 - ◆ To accept one or more registrations, select the desired registration(s) and click **Approve**.
 - ◆ To reject one or more registrations, select the desired registration(s) and click **Reject**.

Standard Edition

The admin must review all registrations.

► **To review self-registrations:**

1. In the Travel Setup Wizard, click the **Site Customization** setup step.
2. Click the **Self-Registration Approval** tab.

3. Pending requests appear by default. Use the **Registration Status** list to view all, approved, or rejected registrations.

4. Review the pending registrations and:
 - ♦ To accept one or more registrations, select the desired registration(s) and click **Approve**.
 - ♦ To reject one or more registrations, select the desired registration(s) and click **Reject**.

Section 5: Configuration

Configuration – Professional Travel

Step #1: Activate the Feature

► **To activate Self-Registration:**

1. Click **Administration > Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. In the **Company Admin** section of the left menu, click **Company Settings**.
3. In the **Property Config** list, select *Company Wide*.

4. Complete these fields:

Purge inactive profiles, days	-1
Self-Registration Admin Emails	<input type="text"/>
Self-Registration Code	<input type="text"/>
Self-Registration Group	<input type="text"/>
Session Idle Time, [0 disable][15-60 enable] minutes	Disable Timeout <input type="button" value="v"/>

Field	Description
Self-Registration Admin Emails	Enter the email address of the admin who will receive a copy of the registration email. For multiple addresses, separate with commas.
Self-Registration Code	Enter a unique code. Generally, this is the name of the client or partial name of the client shortened to 5-10 characters. For example, SAP Concur may be CON1234.
Self-Registration Group	Indicate if there is a specific group to which the Self-Registration feature should be associated; otherwise, associate it with the ALL group.

5. When you type in a field, the **Save Changes** link appears. You must click **Save Changes** to confirm.

Self-Registration Group	<input type="text"/>	Save Changes
-------------------------	----------------------	------------------------------

Note the following:

- SAP Concur will verify that the registration code is unique. If the code is already being used, the admin will see a message asking them to choose something different.

The self-registration code you entered is already in use. Please enter a new code, as this must be unique.

- All changes will be tracked and can be viewed via the **Track Changes** link.
- Once these settings have been set, the administrator can proceed to the **Self-Registration Setup** for further configuration.

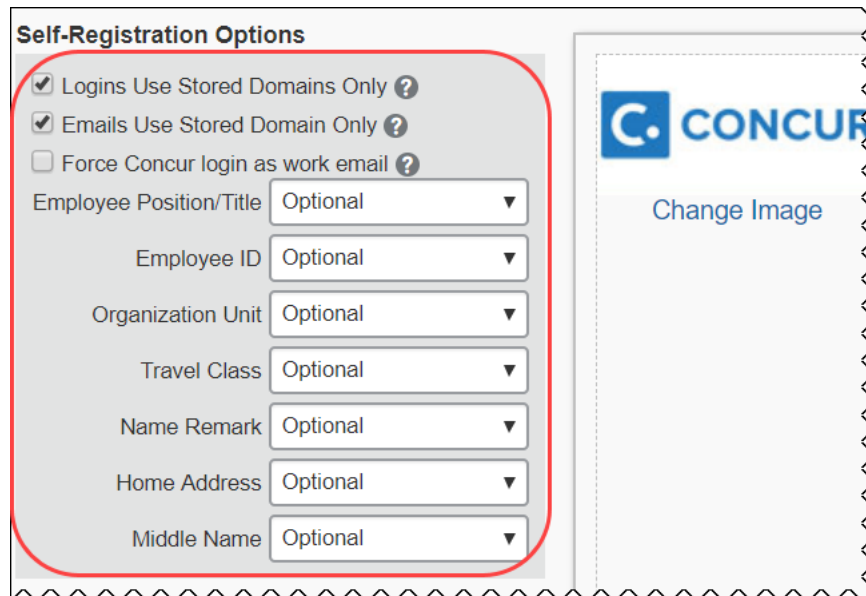
Step #2: Configure the Self-Registration Page

► To configure the Self-Registration page:

1. Click **Administration > Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. In the **User Administration** section of the left menu, click **Self-Registration Setup**. This page appears.



3. In the first section, complete the following fields.

Field	Description
Logins Use Stored Domains Only	<p>Select (enable) this check box to limit a registrant's choice of email addresses (in the Concur Login field on the self-registration page) to those in the company's domain. If selected (enabled), registrants will see the Concur Login field with either:</p> <ul style="list-style-type: none">• The company's domain appended – or –• If the company is set up to allows multiple login domains, a dropdown list of company domains from which to choose <p>If this check box is cleared (disabled), registrants can use any domain in the Concur Login field.</p>

Field	Description
Emails Use Stored Domains Only	<p>Select (enable) this check box to limit a registrant's choice of email addresses (in the Work Email Address field on the self-registration page) to those in the company's domain. If selected (enabled), registrants will see the Work Email Address field with either:</p> <ul style="list-style-type: none"> The company's domain appended – or – If the company is set up to allow multiple login domains, a dropdown list of company domains from which to choose <p>If this check box is cleared (disabled), registrants can use any domain in the Work Email Address field.</p>
Force Concur login as work email	<p>Select (enable) this check box to hide the Work Email Address field, in which case, the work email will be the same as the Concur login.</p>
Employee Position/Title Employee ID Manager Organization Unit Travel Class Name Remark Home Address Middle Name	<p>Define whether any or all of these fields will be visible, optional, or required for the registrant.</p> <p>For each of these, select:</p> <ul style="list-style-type: none"> Don't Show Optional Required

4. Scroll to the right for the next section.

The screenshot shows the Concur self-registration interface. On the left is a sidebar with navigation links. The main content area is titled "Welcome to Concur!" and contains the following text:

Registering for your account is quick and easy. Please fill in the information requested below to continue.

Your account will be created under the Outtask, Inc. account. If this is incorrect, please contact your administrator for the correct registration URL.

Below this text are two links: "Change Image" and "Edit Header Text".

At the bottom of the main content area, there is a red-bordered box containing the text: "Please fill out all fields. Typically, your Concur Login should be the same as the first part of your email address (before the '@')." Below this text is a link: "Add/Edit Text".

The footer of the page is labeled "Account Information".

5. Complete the following fields.

Field	Description
Change Image	To customize the logo that appears on your self-registration page: <ol style="list-style-type: none"> 1. Click this link. 2. Enter the URL for the new logo. 3. Click OK.
Edit Header Text Add/Edit Text	To change the text that appears in the header or instructions for filling in fields: <ol style="list-style-type: none"> 1. Click either link; the fields will then become editable. 2. After you make changes, do one of these: <ul style="list-style-type: none"> ♦ Click OK to save the change. ♦ Cancel to go back. ♦ Restore Default to return to the default text. <p>In order to modify the appearance of the text, you must use HTML tags.</p>

6. Scroll down to the next section. This is the information the user will see.

Account Information

Concur Login @ randomverbs.com

Contact Information

Your Name and Airport Security: Please make certain that the first and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

First Name*:

Last Name*:

Middle Name:

Work Email Address*: @ randomverbs.com

Work Phone*:

Home Phone:

Home Address

(no p.o. boxes please)

Street Address 1::

Street Address 2::

City:

Country:

State/Province::

Postal Code:

Configuration Settings

Time Zone*:

Date Format*:

* marked fields are compulsory

7. Scroll down to the next section.

Please remember to review and update your travel profile before attempting to arrange travel. This can be done by clicking on **My Travel Profile** from the Travel Home page.

If you have any difficulties registering, please contact Customer Support at 888-662-6248 for assistance.

[Edit Footer Text](#)

Save Cancel

8. Edit the footer text the same way as the header text (described above).
9. Click **Save**.


Step #3: Define the Travel Classes for Users to Select




Define whether users will be able to select a travel rule class during the self-registration process or if users will be assigned to a default travel class.

► To define the travel classes:

1. Click **Administration > Company** (on the sub-menu) > **Company Admin**.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. In the **Travel Administration** section of the left menu, click **Travel Admin**.
3. On the **Travel Policy** tab, click **Edit Classes**.
4. Click the pencil  icon to the left of the desired class.
5. Check (enable) the check box in the **Self-Reg** column to allow the travel class to be an option for users.

Options	Travel Class Name	Travel Config	Property Config	Default	Self-Reg	Air Upgr
Save	 Default Travel Class	RandomVerbs.com	Default Configuration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
 	Default Travel Class_Copy1	RandomVerbs.com	Default Configuration			

- ◆ If you select the check box for only one rule class, then all users will default to that one class.
- ◆ If you select multiple check boxes, then the user will see an option to choose one during the self-registration process.

NOTE: The name of the travel class will appear to the user, so make sure the names are recognizable or familiar to them.

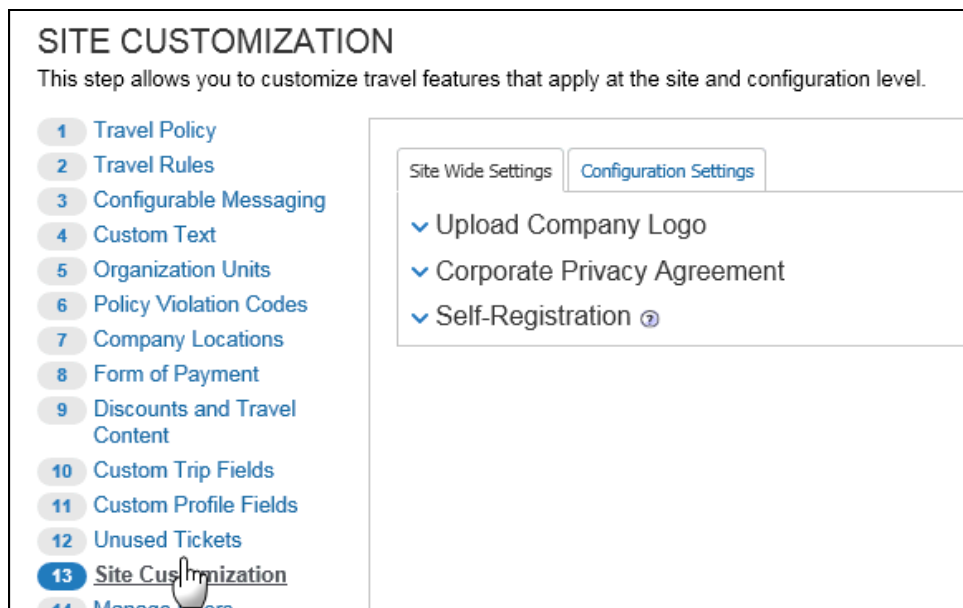
6. Save your changes.

Configuration – Standard Travel

Step #1: Create the Unique Registration Code and Email

► ***To create the unique registration code and email:***

1. In the Travel Setup Wizard, click the **Site Customization** setup step.



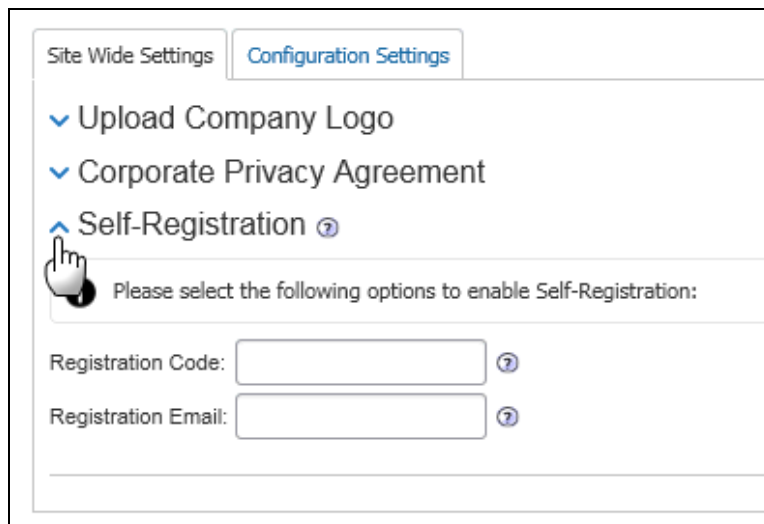
SITE CUSTOMIZATION
This step allows you to customize travel features that apply at the site and configuration level.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization**
- 14 Manage Users

Site Wide Settings | Configuration Settings

- ▼ Upload Company Logo
- ▼ Corporate Privacy Agreement
- ▼ Self-Registration ?

2. Expand the **Self-Registration** section.



Site Wide Settings | Configuration Settings

- ▼ Upload Company Logo
- ▼ Corporate Privacy Agreement
- ▲ Self-Registration ?

Please select the following options to enable Self-Registration:

Registration Code: ?

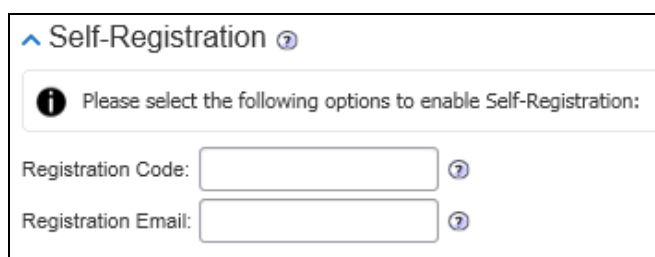
Registration Email: ?

NOTE: If Expense is enabled, the **Self-Registration** section will be hidden.

3. Make the appropriate choices as described in the following table.

Field	Description/Action
Registration Code	Enter a unique code. Generally, this is the name of the client or partial name of the client shortened to 5-10 characters. For example, SAP Concur may be CON1234. IMPORTANT: If this field is left blank, the Self-Registration Setup tab – which is required for configuration – will not appear.
Registration Email	Enter the email address of the admin who will receive a copy of the registration email. For multiple addresses, separate with commas.

4. As you begin entering data into the field, a **Save Changes** link appears. You must click **Save Changes** to save the data.

A screenshot of a web form titled "Self-Registration" with a help icon. Below the title is an information icon and the text "Please select the following options to enable Self-Registration:". There are two input fields: "Registration Code:" and "Registration Email:", each followed by a help icon.

NOTE: Concur will verify that the registration code is unique. If the code is already being used, the admin will see a message asking them to choose something different.

The **Self-Registration Setup** tab appears.

Step #2: Configure the Self-Registration Page

► To configure the self-registration page:

1. Click the **Self-Registration Setup** tab.

Site Wide Settings
Configuration Settings
Self-Registration Setup
Self-Registration Approval

Self-Registration Options

☐ Emails Use Stored Domain Only ?
☐ Logins Use Stored Domains Only ?

☐ Force Concur login as work email ?

Employee Position/Title
Don't Show ▼
Employee ID
Don't Show ▼

Manager
Don't Show ▼
Organization Unit
Don't Show ▼

Travel Class
Don't Show ▼
Name Remark
Don't Show ▼

Home Address
Optional ▼
Middle Name
Optional ▼

Change Image
/static/images/brand/logo-5

2. Make the appropriate choices as described in the following table.

Field	Description/Action
Logins Use Stored Domains Only	<p>Select (enable) this check box to limit a registrant's choice of email addresses (in the Concur Login field on the self-registration page) to those in the company's domain. If selected (enabled), registrants will see the Concur Login field with either:</p> <ul style="list-style-type: none"> The company's domain appended – or – If the company is set up to allows multiple login domains, a dropdown list of company domains from which to choose <p>If this check box is cleared (disabled), registrants can use any domain in the Concur Login field.</p>
Emails Use Stored Domains Only	<p>Select (enable) this check box to limit a registrant's choice of email addresses (in the Work Email Address field on the self-registration page) to those in the company's domain. If selected (enabled), registrants will see the Work Email Address field with either:</p> <ul style="list-style-type: none"> The company's domain appended – or – If the company is set up to allows multiple login domains, a dropdown list of company domains from which to choose <p>If this check box is cleared (disabled), registrants can use any domain in the Work Email Address field.</p>
Force Concur login as work email	<p>Select (enable) this check box to hide the Work Email Address field, in which case, the work email will be the same as the Concur login.</p>

Field	Description/Action
Employee Position/Title Employee ID Manager Organization Unit Travel Class Name Remark Home Address Middle Name	Define whether any or all of these fields will be visible, optional, or required for the registrant. For each of these, select: <ul style="list-style-type: none"> • Don't Show • Optional • Required

3. Scroll down to the next section.

Edit Header Text

Welcome to Concur
<p>Registering for your account is quick and easy. Please fill in the information requested below to continue.</p><p>Your account will be created under the Outtask, Inc. account. If this is incorrect, please contact your administrator for the correct registration URL.</div>

Add/Edit Text

Please fill out all fields. Typically, your Concur Login should be the same as the first part of your email address (before the ""@"").</div>

Edit Footer Text

Please remember to review and update your travel profile before attempting to arrange travel. This can be done by clicking on My Travel Profile from the Travel Home page.

If you have any difficulties registering, please contact Customer Support at 888-662-6248 for assistance.</div>

Field	Description/Action
Edit Header Text Add/Edit Text Edit Footer Text	Change the text as desired. In order to modify the appearance of the text, you must use HTML tags.

4. Click **Save**.

5. Click **Self-Registration Page Preview**. The preview appears, showing the registration page as the user sees it.

► **Best Practice:** Concur recommends administrators use the preview to ensure the page meets the customer's needs.

Travel: Self-Registration Travel Service Guide
Last Revised: September 17, 2019
© 2004 - 2024 SAP Concur All rights reserved.

13

Section 6: Self-Registration URLs

The default registration URL differs depending on the datacenter used by the customer:

North America Data Center:

https://www.concursolutions.com/registration/register_form.asp?regcode=XXXX

EMEA Data Center:

https://eu1.concursolutions.com/registration/register_form.asp?regcode=XYZ123

In either case – the XXXX or XYZ123 is the Registration Code identified at the beginning of the process.

There are several ways to modify the URL to accommodate different language requirements and agency branding.

Add Language

Amend the URL above with the following syntax:

Language	Syntax
Dutch	&lang=nl
English (AUS)	&lang=en-au
English (UK)	&lang=en-gb
French	&lang=fr
French Canadian	&lang=fr-ca
German	&lang=de
Italian	&lang=it
Portuguese	&lang=pt
Spanish	&lang=es

For example, if you would like the self-registration page to appear in French Canadian, the URL would look like this:

https://www.concursolutions.com/registration/register_form.asp?regcode=XXXX&lang=fr-ca

NOTE: Any custom text that is added must be translated in self-registration setup. The only items that are translated with the Language settings are the standard fields on the form.

Branding

Amend the URL above with the following syntax:

&host=hoststring

So the full URL would look like this:

https://www.concursolutions.com/registration/register_form.asp?regcode=XXXX&host=hoststring

The host string would be the same value in Host String in the Company Configuration.

NOTE: The TMC branding will not show on the self-registration page but will be included in the URL shown to the user at login, on both the self-registration confirmation page (when user is allowed to choose their password) and in the email that is sent to the user (when user is **not** allowed to choose their password).

Language and Branding Together

To set both TMC branding and language, the URL should be configured like this:

https://www.concursolutions.com/registration/register_form.asp?regcode=XXXX&lang=fr-ca&host=hoststring

Section 7: Security

To increase security, an admin can require that **only** email addresses that match the customer domain are permitted.

In addition, SAP Concur recommends that all clients confirm or improve the following controls:

- Remove all publicly-available information that describes the steps for self-registration of Concur Travel.
- Discontinue the use of default, global, and easily identifiable passwords.
- Lock or remove accounts for employees who do not travel.
- Increase password complexity; decrease password expiration time.

Section 8: Email Notifications

What the Admin Sees

The following is an example of the email Concur Travel sends to the administrator when a new user self-registers (received from Concur User Registration <support@concursolutions.com>):

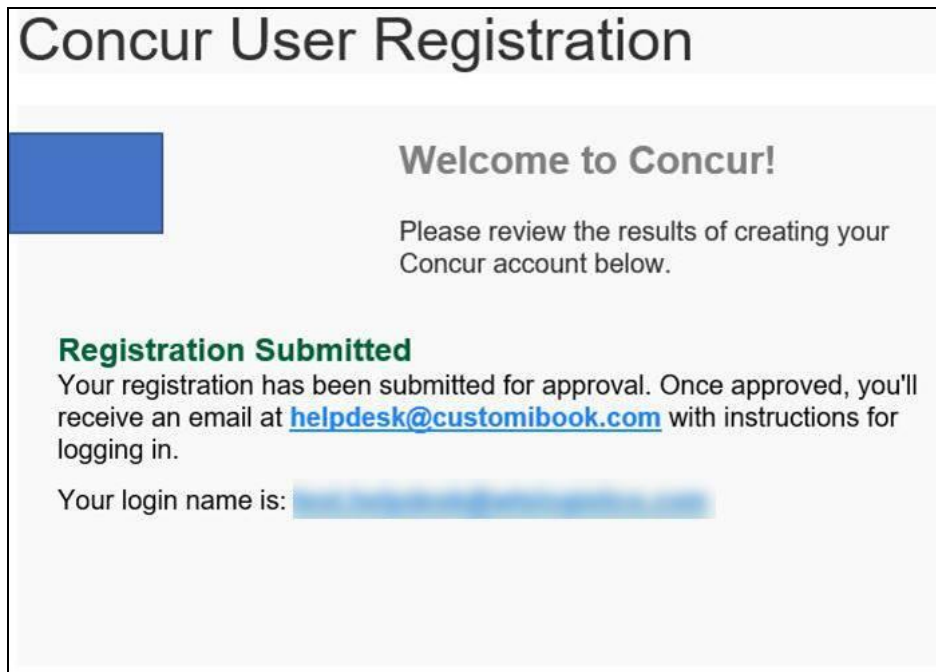
The following user registered for Concur Travel.

Concur Login: test@testcom
Company Name: Test Site
First Name: William
Middle Name:
Last Name: Never
Work Email Address: test@yahoo.com
Employee Position/Title:
Work Phone: 555-1212
Home Phone:
Street Address 1::
Street Address 2::
City:
State/Province/Region:
Postal Code:

Please approve or reject this request through Self-Registration Approval.

What the User Sees

The following is an example of the email Concur Travel sends to the user upon completion of login creation:



Hello Test User,

To reset the password associated with Login ID test@test.com, please click on the following link:

<https://www.concursolutions.com/v.asp?x=1&d=1&u=55474484&t=14032821&h=%2BGBZ6GWUxG3O%2FYwXhfwHyYk6PGk%3D>

This is a one-time only link that will expire in 24 hours.

Note: If the link above is split into multiple lines, you'll need to copy/paste the entire link into the Address field of your browser. If you are experiencing difficulty with this link and require assistance, please contact your program administrator at your company.

Kind Regards,
Customer Support
Concur Technologies, Inc.

Section 9: FAQ

Questions

Q. Is it possible to show custom fields on the self-registration page?

A. No.

Q. Does the password policy set for the site apply to self-registration?

A. Yes.

Q. Is there a way to change the link on the welcome page that appears after self-registration is complete?

A. No.

Q. Can I enable self-registration for an integrated Travel and Expense site?

A. No.

