

Objective: This section will cover the steps for creating a sponsored guest account.

A *Sponsored Guest* is a term used in the Concur Travel System to refer to visiting guests or individuals who are relocating.

1. From the Concur home page, **go** to *Profile > Profile Settings > Sponsored Guest Users*.



2. Click [+] Add a Sponsored Guest User.

Sponsored Guest Users Go to					o top	
Below are the non-staff/non-employee users you are sponsoring						
our Sponsorod Us	ors		Г		Sponsored Gues	t Lle
our sponsored ose	615			Huu a 3	porisoreu dues	51 05
User Name	Non-Employee User Type	Start Date	End Date	Hud a 3	ponsored dues	st US
User Name Coleman,Aaron	Non-Employee User Type Invitational Traveler	Start Date 11/13/2018	End Date 11/14/2018	Expired	View Profile	_



3. You will be directed to a page for creating a Sponsored Guest profile. **Fill out** the form as completely as possible, ensuring that all required fields marked with an asterisk or highlighted in red are completed. **Pay attention** to the following special rules:

- a. Role(s): Check the box labeled "Expense User" and select "Visitor/Non-Employee."
- b. **CTE Login Name**: Create a Concur login for the Sponsored Guest. Follow the format <u>firstlastSG@Slac.Stanford.Edu</u>
 - a. Note: This should NOT be the actual email address of the Sponsored Guest.
- c. Password: Create a generic password for the user.
- d. Account Termination Date: Leave this field blank.
- e. Employee ID: Input sponsored guest's name in the following format: FirstLast.
- f. Email Address: Enter the Sponsored Guest's actual email address in this field.
- g. Non-Employee User Type: Select the appropriate response.
- h. **Sponsor Name**: This should be the name of the admin creating the account for the guest.
- i. **Sponsorship Start and End Date**: Enter the dates as stated on the invitation letter and click Save.
- j. Message to Hotel Vendor: Unless you have a specific message, write "N/A."

	Save Save and Notify New	User Cancel	
Request Approver Employee Group Configuration: *Global	Expense User	C Expense	Approver
F	Password*	Verify	Password*
	Create generic password for use	er 🗍 🗌	Create generic password for user
First Name*	Middle Name	Preferred Name	Last Name*
First			Last
ist User)		Account Terr Email Addre Enter	nination Date ss sponsored guest actual email address
Sponsor Name*	Sponsorship Start Date*	Sponsorship End Da	ate*
	Request Approver Employee Group Configuration: *Global First Name* First st User) Sponsor Name*	Sove and roduly new	Save Save and round roun



4. In the Expense and Invoice Settings, fill out the following fields as indicated below:

- a. Employee Group: Select Visitor/Non-Employee
- b. Country of Residence: Select UNITED STATES

Note: The Concur system requires that the country of residence to listed as the United States since all reimbursements are issued in US dollars. Always select UNITED STATES.

- c. Ledger: Select PeopleSoft
- d. Reimbursement Currency: Select US, Dollar
- e. Traveler Type: Select Non employee
- f. U.S Citizen/Green Card Holder?: Select correct option

J Is a lest User?		Employee Group		Country of Residence		State/Province		Ledger	
		Visitor/Non-Employee		UNITED STATES	`	Select one	_*	PeopleSoft	_
eimbursement Currency		Traveler Type		Vendor ID		Audit Group		Cash Advance Account Code	
US, Dollar	~	Non Employee	~						
ash Advance Balance		BI Manager		Project		Activity		WBS	
					~		~		~
und		Org		Location		SSN		BUSINESS_TITLE	
	~								
S Citizen/Green Card Holder?		Country of Citizenship		Medical Waiver		Medical Waiver Expiration Date		Paid Outside Concur?	
Yes	~						e		



5. If the Sponsored Guest already has an established account, you'll encounter an error message. In such cases, please reach out to <u>travel@slac.stanford.edu</u> and provide the name of your guest, and request to be added as a sponsor.

Select Expense User	NULLE NAME		FIELEN NAME	×
The Expense system contains user(s) whose and Employee IDs must be unique in Expen this employee will not be granted access to	e Login ID or Employee I se. Select the correct m Expense.	D are the same as the s atch for this user. If you	elected user. Login ID do not select a match)s 1,
Employee ID†≞	Login ID	Last Name	First Name	
		1		
			Select Car	ncel

6. If you do not receive the error message, once the form is complete, double check the form and then **click** *Save and Notify New User*.



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Note: Do <u>not</u> edit the *Email Parameters*. The setup listed is necessary for giving your Sponsored Guest access to Concur.



7. After the form is submitted, an email will be automatically generated and forwarded to the Sponsored Guest (as shown in the example below). This email will contain a link allowing them to reset their password to activate their Sponsored Guest account.

Password Reset Request
Hello test user,
Welcome to Concur. Log in to your world class Concur solution here and begin managing business travel and expenses.
To reset the password associated with Login ID testuser3sg@slac.stanford.edu, please click on the following button:
Reset Your Password
If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser: http://us2.concursolutions.com/nui/signin/reset/password? lang=en&uuid=377FD2FE-167B-494F- B57B-6A979CCC3AA9&token=dd-2ozoed13a1a20pm32g8odpn2ii9sdv
This link will expire in 24 hours.
Your administrator sent you this message: .
If you are experiencing difficulty with this link and require assistance, please contact your program administrator at your company.
ind Regards, Customer Support Concur Technologies, Inc.

8. If the Sponsored Guest fails to access the link and cannot log in and change their password within one week the link will expire. please reach out to <u>travel@slac.stanford.edu</u> and provide the name of your guest, and request a password reset.