

Quick Guide: Concur Profile Setup

Guide Overview

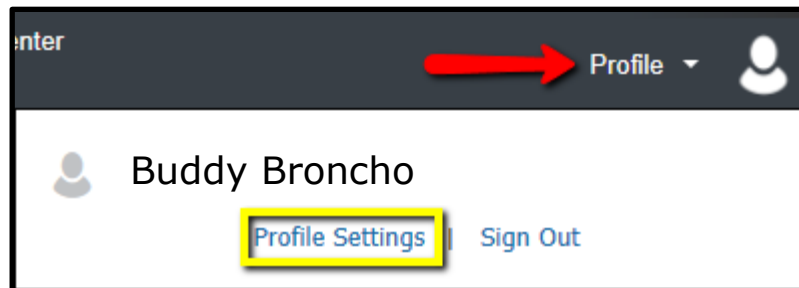
This Guide will provide you instructions on how to setup your **Profile** in Concur. Upon initial access to Concur, setting up your **Profile** is the first step to take.

Accessing Concur

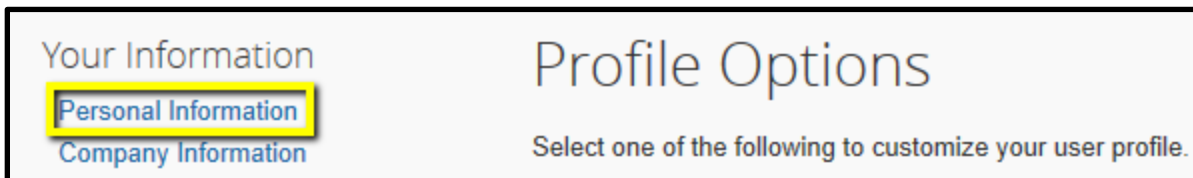
Go to bronchotravel.uco.edu and Login with your UCO credentials.

Profile

1. Select your **Profile** menu in the upper right corner of your screen and click **Profile Settings**.



2. Click **Personal Information** from the left-side menu.



3. Your **Name** will default from HR. Please verify it matches your government issued ID that you present at the time of travel. If it does not match your travel ID please contact HR.
4. Your **Work Location** will auto populate.
5. Your **Home Location** may be entered if desired. Click **Save**.
6. **Contact Information** should be entered. This is the information that the contracted travel agency will use to contact you in the event of a travel disruption. Please note that only a **Work Phone** *or* a **Home Phone** (this can be a **Cell Phone**) is **Required**. Click **Save**.

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7. The **Email Addresses** section will display your UCO email account and must be verified.
 - a. To verify your email address, click the **Verify** hyperlink. A pop-up will appear notifying you that a verification email has been sent to the account listed.
 - b. You should soon receive an email from Concur with a **Verification Code**.
 - c. **Copy the code** and paste it in the **Enter Code** box. Click **OK**.
 - d. A pop-up will appear notifying you that the email address has been verified and that you can now send receipts directly to Concur by emailing them from the verified email to Receipts@Concur.com and trip information by emailing details to Plans@Concur.com.

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

+ Add an email address

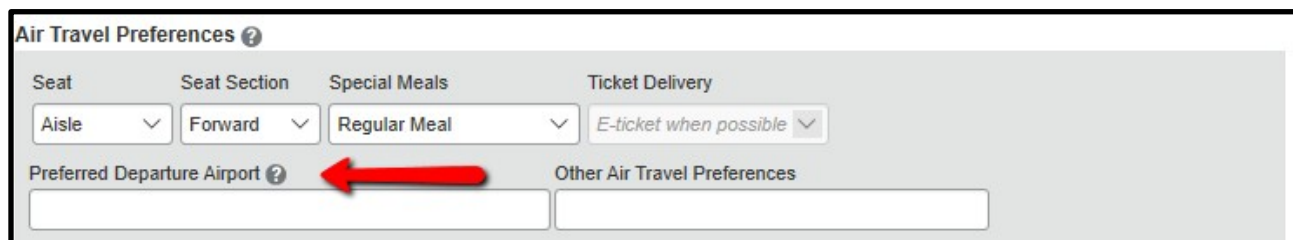
Email Address	Verify	Contact?	Actions
Email 1 bbroncho@uco.edu	 Check email for code Resend Cancel	Yes	

Enter Code

8. The **Emergency Contact** section should be completed. This is the information that the contracted travel agency will use to contact you in the event of a travel emergency. Please note that the system will only accept letters when entering in a name. Do not enter in dashes, quotation marks, slashes, etc. as this may cause your profile to generate errors when using the travel section of Concur. Click **Save**.


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9. The **Travel Preferences** section can be completed or left blank. Entering in the **Preferred Departure Airport** will reduce the time required to search for flights.



Air Travel Preferences ?

Seat	Seat Section	Special Meals	Ticket Delivery
Aisle	Forward	Regular Meal	E-ticket when possible

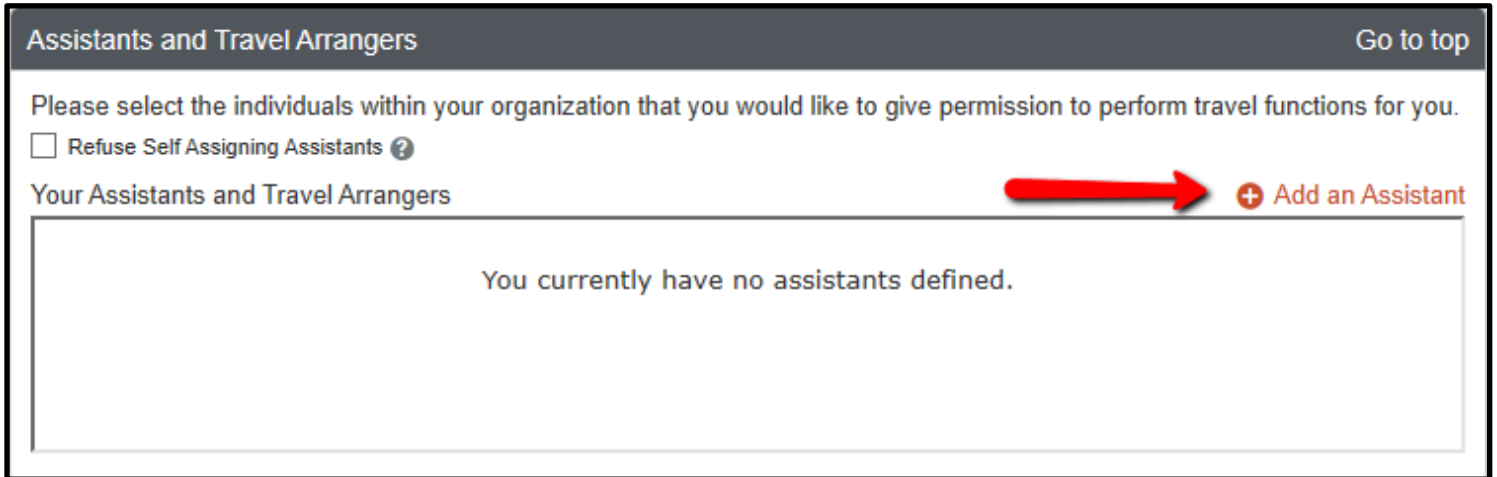
Preferred Departure Airport ?  Other Air Travel Preferences

10. The **Frequent Traveler Program** information can be entered, noting that the State Travel Reimbursement Act 74 O.S. § 500-15 says **“no travel claim shall be awarded if the filer of the claim has benefited from the personal receipt of frequent travel miles unless those miles are used to offset future claims against the state.”**
- Click on **+ Add a Program** and a pop-up menu will appear. Select the **program type** by clicking on the Airplane, Rail or Car icons   , select the **company name** from the dropdown list and then enter in the appropriate **program number**. Click **Save** when complete.
 - The paragraph below the **Frequent Traveler Program** section allows you to connect reward programs. If you have entered in rewards information, click either **I Agree** or **No Thanks**.
11. In the **TSA Secure Flight** section, please enter your **Gender** and **Date of Birth**. If you have a **TSA Precheck Number**, that information can be entered in this section.
12. The **International Travel** information section can be completed if you have a **Passport** or **Visa**.
- For a **Passport**, click the **+ Add a Passport** link. Enter in your **Passport Nationality**, **Passport Number**, **Date Issued** and **Place Issued (City, State)**. When entering **Place Issued (City, State)**, enter **USA** or the country of authority listed on your passport. Enter in your **Country Issued** and **Passport Expiration** date. Click **Save** when complete.
 - For a **Visa**, click the **+ Add a Visa** link. Enter in your **Visa Nationality**, **Visa Type**, **Visa Number** and **Visa Expiration** date. Click **Save** when complete.

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13. Assistants and Travel Arrangers are employees who are allowed to book travel within Concur on behalf of other employees. The assistant and travel arrangers must be set up separately from the Request & Expense Delegates.

- a. To set up an assistant/travel arranger click on **Add an Assistant**.



Assistants and Travel Arrangers Go to top

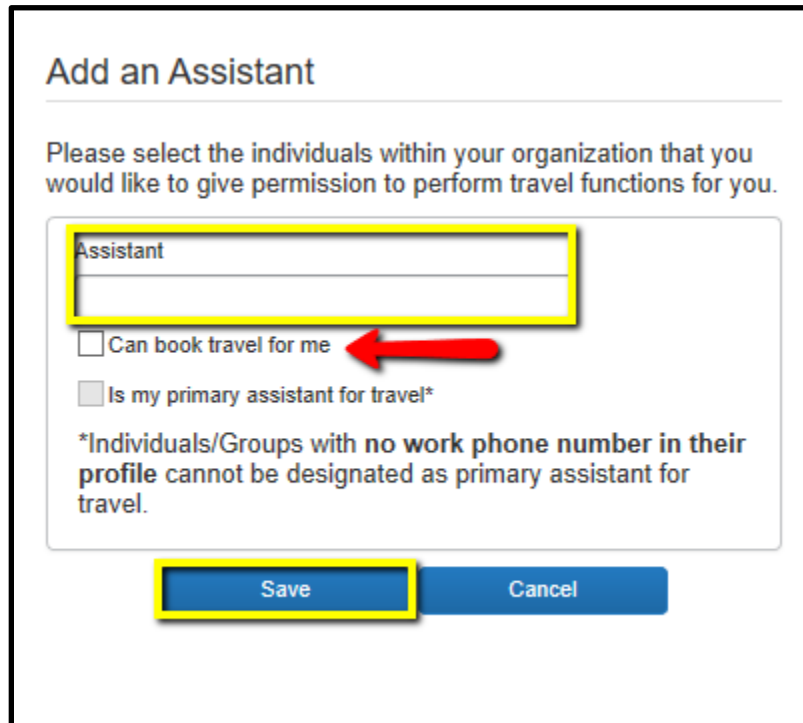
Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers ➕ Add an Assistant

You currently have no assistants defined.

- b. In the pop-up search for the individual by name, check the appropriate box and click **Save**.



Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.


Save Cancel

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- 14.** The **Credit Cards** section information is where your **Individual Travel Card number** can be listed. Please note that a credit card is required to complete an online booking but is not required otherwise.
- Click on **+ Add a Credit Card** to enter card information and a pop-up menu will appear. Please note that when entering in your **card information**, you can choose to give a card a **Display Name**. When entering your **Individual Travel Card number**, please make sure that the **billing address** listed is the address used on the **Individual Travel Card application**, not your home address, which is the billing address that will automatically populate. If you included a building name/room number on your **Individual Travel Card application**, first enter in the **street address**, click **Enter** and then enter in the **building name/room number** on the second line.

Credit Cards Go to top

You currently have the following credit cards saved with your profile.

 [+ Add a Credit Card](#)

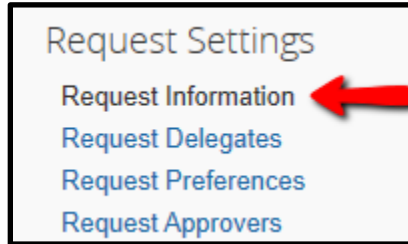
You currently have no credit cards saved.

[Save](#)

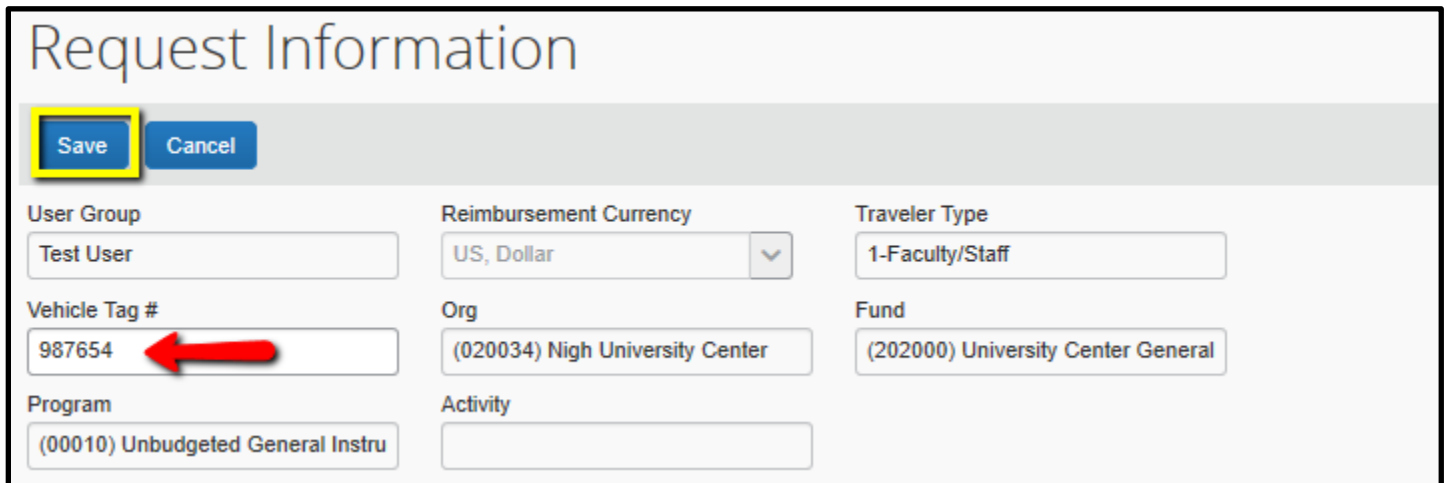
- 15.** Once all required information has been entered in the **Personal Information** section, click on any of the **Save** buttons on the screen.

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16. Next, click on **Request Information** from the left-side menu.



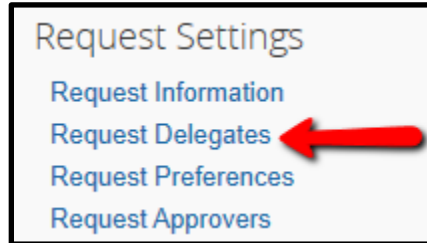
17. Enter in your **Personal License Plate Number**. This information is required for any **Mileage** expenses and will automatically populate for those expenses once entered in your **Profile**. Click **Save**.

A screenshot of the "Request Information" form. At the top left, there are "Save" and "Cancel" buttons. The form contains several input fields: "User Group" (Test User), "Reimbursement Currency" (US, Dollar), "Traveler Type" (1-Faculty/Staff), "Vehicle Tag #" (987654), "Org" ((020034) Nigh University Center), "Fund" ((202000) University Center General), "Program" ((00010) Unbudgeted General Instru), and "Activity" (empty). A red arrow points to the "Vehicle Tag #" field.

- a. Please note the **default chart field**, this information in the **Org, Fund, Program,** and **Activity** subclass sections will auto populate from the Payroll Org. If needed, the Org from which you travel can be changed in the **Request** module.

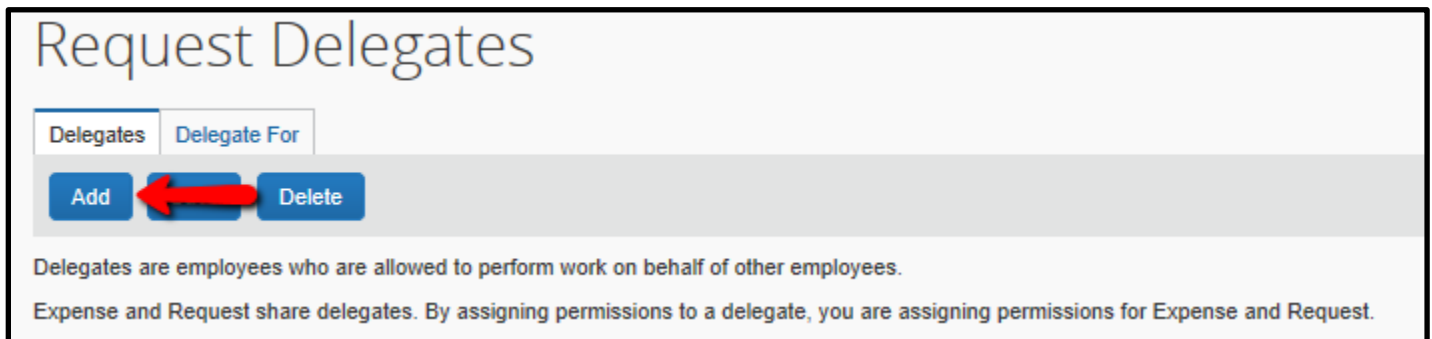
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18. Next, click on **Request Delegates** from the left-side menu.

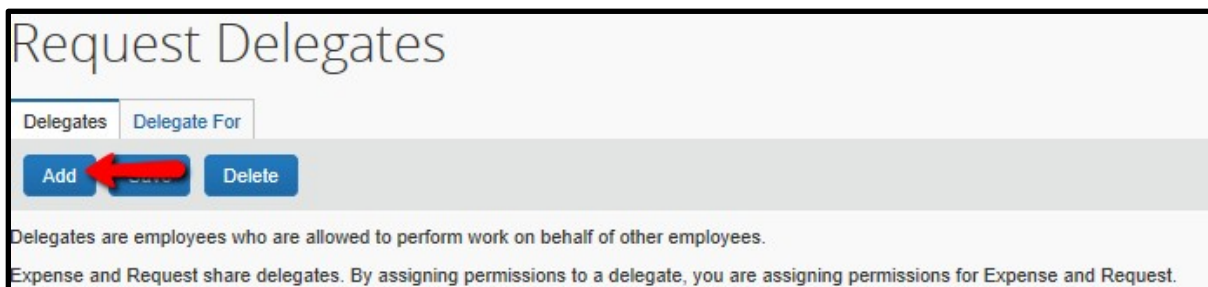


19. Delegates are employees who are allowed to perform Concur tasks on behalf of other employees. If you have an individual that you want to assign as a Delegate, click **Add**.

- a. Please note **Request** and **Expense** share delegates. By assigning permissions to a delegate, you are assigning permissions for **Request** and **Expense**.




20. Search for the individual by name and when the correct individual appears, click **Add**.



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- 21.** Select the appropriate **access boxes** based on what you want the individual to be able to assist with.
- a. Can Prepare.** This option allows a Delegate to prepare a request on your behalf.
 - b. Can Submit Request.** This option allows a Delegate to submit a Request on your behalf. Requests are required for any Out of State or International expense reports. In State requests are required when the traveler is in overnight travel status.
 - c. Can View Receipts.** This option allows a Delegate to view any Receipts that have been uploaded to your Available Receipts through the Concur Mobile app.
 - d. Receives Emails.** This option allows a Delegate to receive emails associated with your requests. These could be request approvals, pending Travel Card transactions, expiring notifications, etc.
 - e. Can Approve.** If you grant a Delegate access to approve, they will have the ability to approve all requests that you have access to.
 - f. Can Approve Temporary.** This option is available for a Delegate to have access to approve on a temporary basis. Use the calendar options to select a temporary approval date range.
 - g. Can Preview for Approver.** This option is available for a Delegate to preview request in the approver's approval queue. Please note that a Delegate who is given the Preview option is not allowed to approve.
 - h. Receives Approval Emails.** This option is available for a Delegate to receive the same approval notification emails as an approver.

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Broncho, Buddy bbroncho@uco.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>

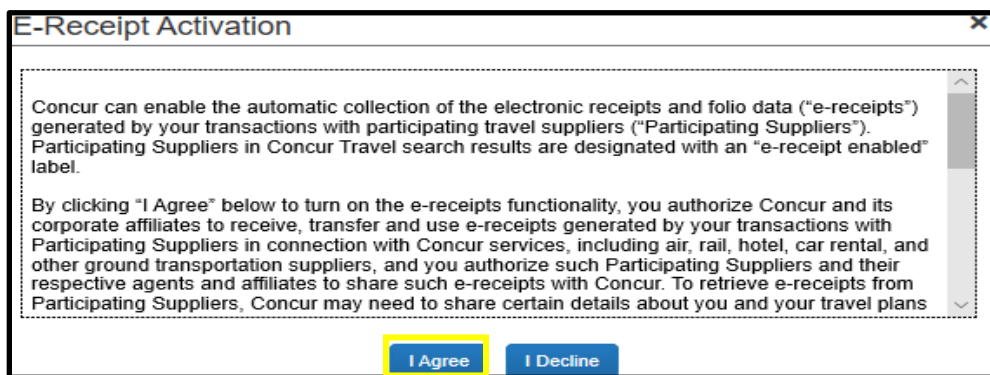
- 22.** Once the appropriate selections have been made, click **Save**.
- 23.** If a Delegate ever needs to be deleted from your **Profile**, select the box to the left of their name and click the **Delete** button.

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24. Next, select **E-Receipt Activation** on the left-side menu.

- a. This section will allow you to active **E-Receipts** which are electronic receipts automatically imported into Concur by some merchants that will substitute for an actual receipt.

25. Click on the **E-Receipts** hyperlink and then **I Agree** to activate this function.



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Concur Mobile

26. Next, select **Concur Mobile Registration** on the left-side menu.
- This section will allow you to enter your email address. Then Concur will send a link to download the **Concur Mobile** app.
 - Or, For the first time to sign in to the Concur app, simply tap on **Company Code Sign In** after downloading the Concur Mobile app and enter your company code: **KPGYN9**.
 - Follow the instructions for: **Single Sign On**. Click **Save**.


Concur Mobile

Manage your expenses and business travel on your mobile device.

To get started, enter your email address below and we will send you a link to download the app.

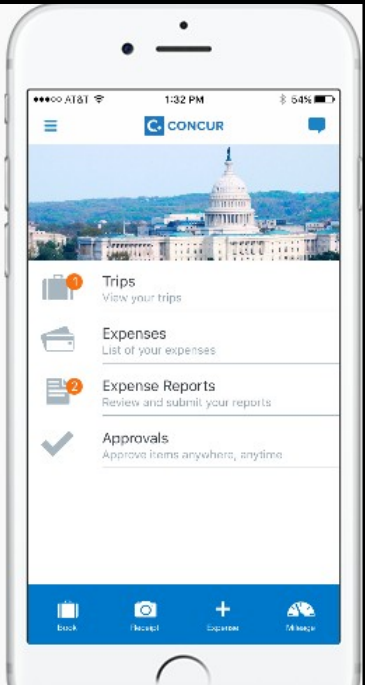
Or, review your sign-in details:

To sign in to the Concur Mobile app, simply tap on "Company Code Sign In" after downloading the Concur Mobile app and enter your company code. Then follow the instructions per your company procedure for single sign on.

Company Code: **KPGYN9** 

Alternatively, you can use your Concur username and a Concur Mobile PIN.
Click Forgot Concur Mobile PIN in the left hand menu to reset your existing Concur Mobile PIN.

Concur Username:

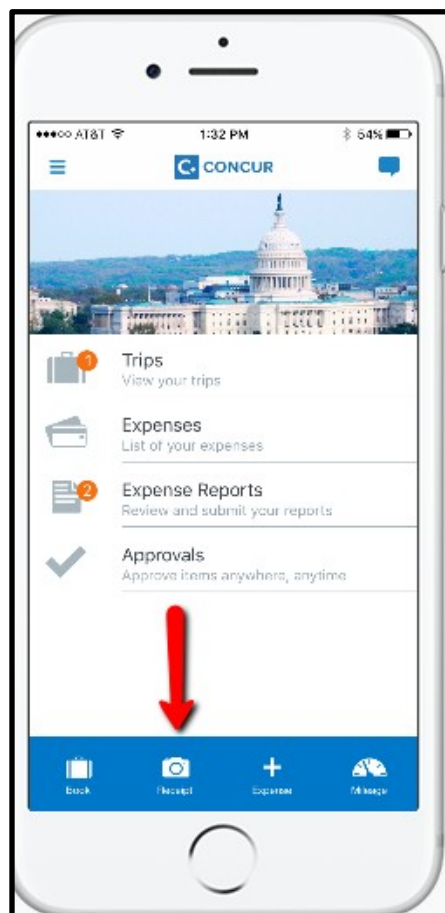


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Apps

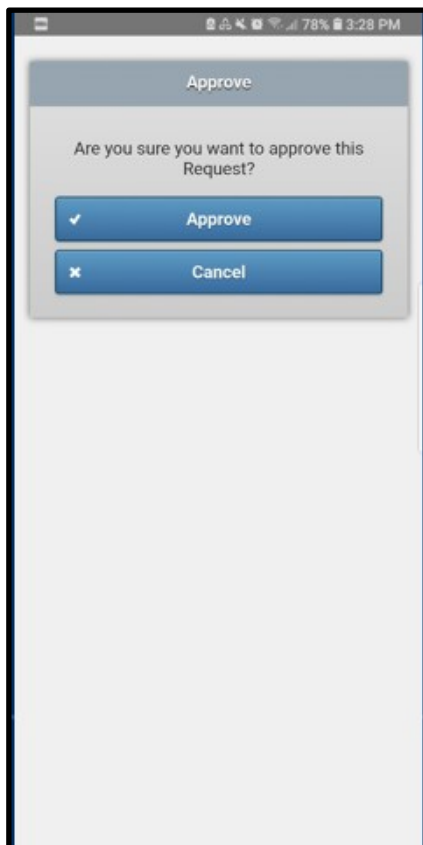
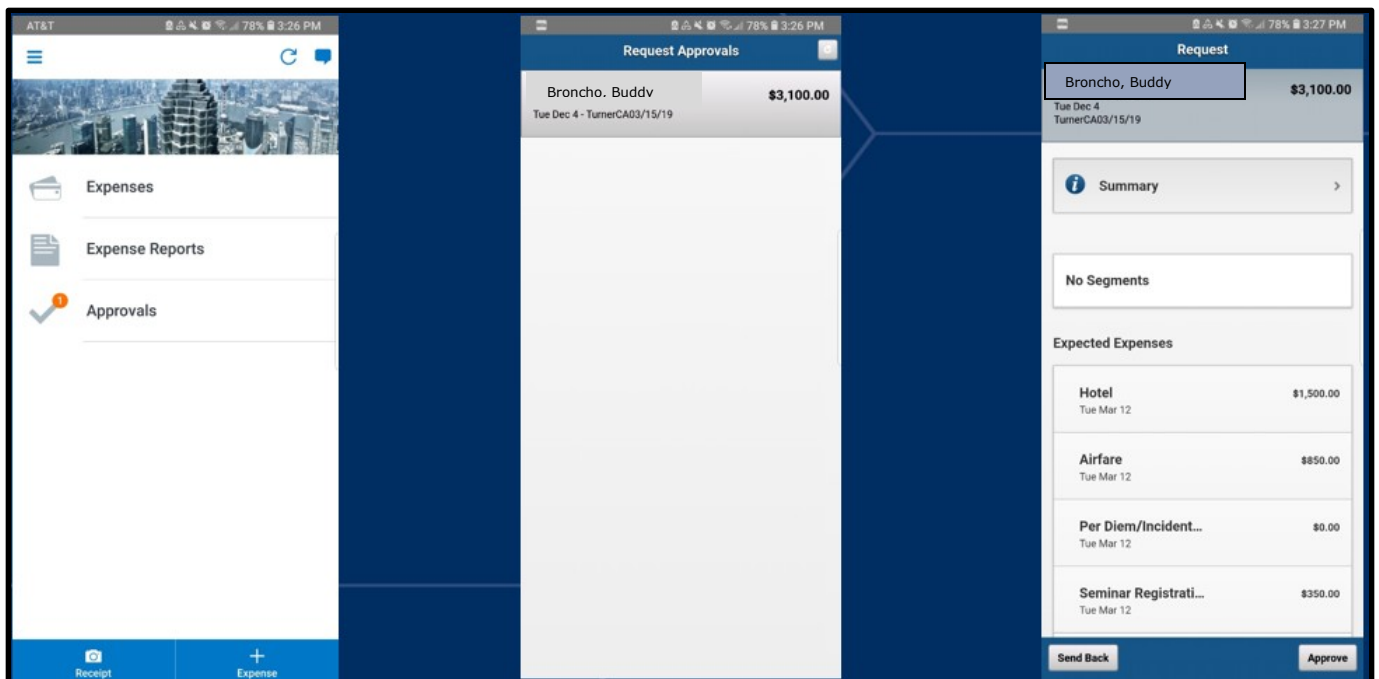
Concur is linked with several different companies that provide **Apps** for travel related services like Uber, Lyft, Airbnb, etc. The two most popular Apps available through Concur are **Concur Mobile** and **TripIt**. Each mobile device will have specific download instructions but the basic steps to utilize the most popular **Apps** are listed below.

- a. **Concur Mobile**. This is the mobile version of Concur. This **App** will allow you to take pictures of receipts and automatically upload them to Concur. This **App** also incorporates Optical Character Recognition technology to read receipt details like vendor name, dates and amounts so that those details do not have to be entered manually.



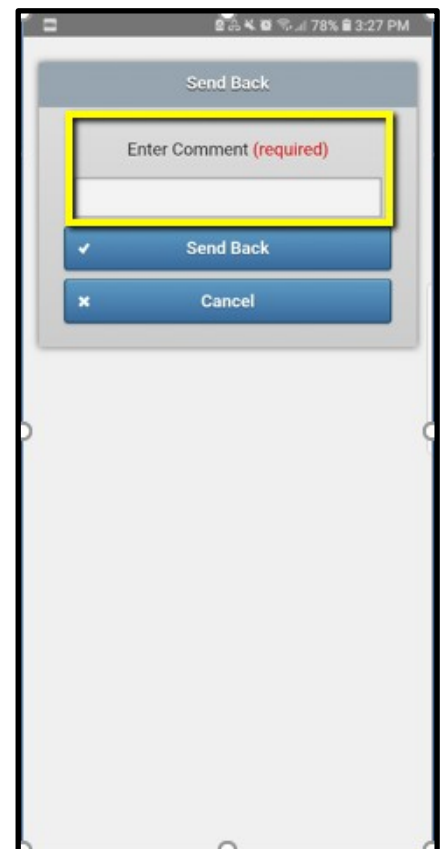
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This **App** is also useful for Approvers to keep up with their approval process.



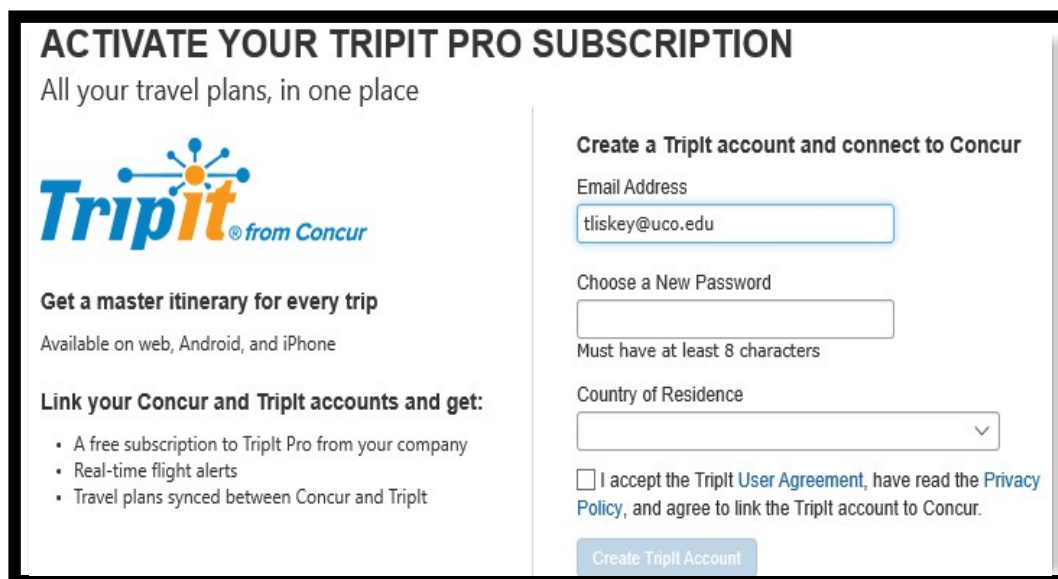
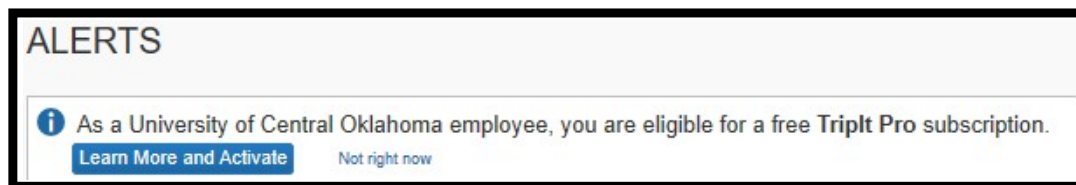
Approvers can either Approve or Return to the Traveler.

If returning to the Traveler, a comment is required.



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b. TripIt Pro. This **App** will act as your personal travel assistant by organizing your travel plans, updating you on flight alerts and allow you to share your plans with others. Download the **free** version of **TripIt**. When registering, use your **UCO email address** and create a unique **password** that is not your UCO password. Once the free version is downloaded, go to **bronchotravel.uco.edu** and login with your UCO credentials. At the top of the **Alerts** section, you will see a notification about activating the **TripIt Pro** subscription. Click **Learn More and Activate**. In the pop-up screen, enter in your **UCO email address** and the **unique password** that you created for **TripIt**. Click **Sign Up**. **TripIt** will send a verification email to your UCO email account. **Open** the email, **verify** your account by clicking on the link in the email and you will be upgraded to the **TripIt Pro** version of the **App**.



The screenshot shows a form titled "ACTIVATE YOUR TRIPIT PRO SUBSCRIPTION" with the subtitle "All your travel plans, in one place". On the left side, there is the TripIt logo with the text "from Concur". Below the logo, it says "Get a master itinerary for every trip" and "Available on web, Android, and iPhone". Underneath, it says "Link your Concur and TripIt accounts and get:" followed by a bulleted list: "A free subscription to TripIt Pro from your company", "Real-time flight alerts", and "Travel plans synced between Concur and TripIt". On the right side, there is a section titled "Create a TripIt account and connect to Concur" with the following fields: "Email Address" (with the value "tiskey@uco.edu"), "Choose a New Password" (with a note "Must have at least 8 characters"), and "Country of Residence" (a dropdown menu). At the bottom of this section, there is a checkbox for "I accept the TripIt User Agreement, have read the Privacy Policy, and agree to link the TripIt account to Concur." and a blue button labeled "Create TripIt Account".

For more information on other **Apps** connected with Concur, click the **App Center** from the main menu.