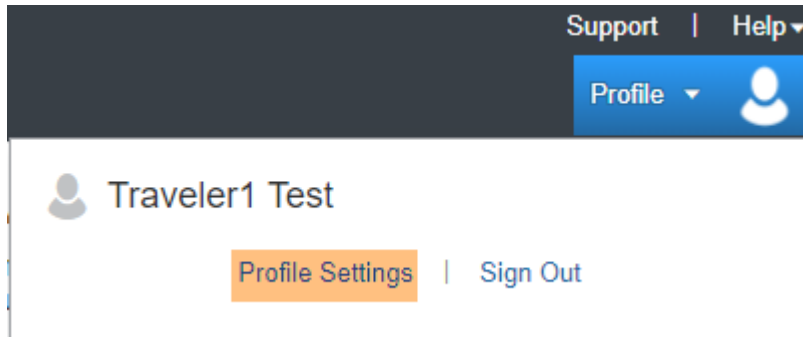# Concur Getting Started –
Review and Complete User Profile Settings

Process: Before creating any travel requests or expense reports, Concur Travel and Expense users should review and update their user profile to ensure the accuracy of the data.

Procedures

Login to SAP Concur	• Login to MyUK • Click the link for Concur Travel and Expense Management. • From the Concur homepage, click Profile, then Profile Settings. Support | Help▾ Profile ▾ Traveler1 Test Profile Settings | Sign Out • Complete the following Information:

Personal Information	• Name: **Required**
	   o First and Last Name will be populated from your University HR record.
	   o Add Middle Name and, if applicable, Suffix to match your government issued photo ID which you will present to airport security. NOTE: If the name information is incorrect, refer to BPM E-8-8 at the link below:
	   https://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/bpm/E-8-8.pdf.
	
	⚠ Important Note
	Your Name and Airport Security: Please make certain that the first, middle, 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.
	
	Title / First Name / Middle Name[Required] / Nickname / Last Name / Suffix
	Traveler1 / Joseph / Test
	☐ No Middle Name

- Company Information – for emergency alerts, enter the following:
    - o Your department name
    - o Your email address
    - o Your department number

- Address: Optional

- Contact Information:
  - Enter a work and home phone number. **Required**
  - Register your mobile device. **Highly Recommended**
    - In the section under "Mobile Devices", click "Add a new device".
    - Enter a name for your device and select the device type.
    - Ensure the correct country code is selected from the dropdown.
    - Enter your mobile number.
    - Check "Primary Mobile Phone" and "Use for Safety and Business Text Message Alerts".
    - Click OK.
  - NOTE: Registering your mobile devices will allow you to receive text messages from Concur informing you of any cancelled or delayed airline flights in addition to informing you of potential risks in your travel area.

Contact Information

Work Phone [Required**]
859-555-3233

Work Extension

Home Phone [Required**]
859-555-7758

Pager

Other Phone

Concur Mobile Devices

Register and manage your mobile devices here.

Add a new device »

- Verify Your Email Address:
  - Click the Verify link.
    - A code will be sent from Concur to your university email 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 UK 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

Email Addresses

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?

	Email Address		Verify
Email 1	concurexpense@uky.edu	Not Verified	Verify

- 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.

Emergency Contact

Name	Relationship
Traveler2 Test	Other

Street

☑ Address same as employee

City	State/Province	Postal Code

Country/Region	Phone	Alternate Phone
United States of America		

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.

Travel Preferences

ℹ Activate your complimentary TripIt Pro subscription to stay one step ahead while traveling.   **Get TripIt Pro**

Eligible for the following discount travel rates/fare classes

☐ AAA/CAA ☐ Government ☐ Military ☐ Senior/AARP

Air Travel Preferences ❓

Seat	Seat Section	Special Meals	Ticket Delivery
Don't Care ∨	Don't Care ∨	Regular Meal ∨	E-ticket when possible ∨

Preferred Departure Airport ❓   Other Air Travel Preferences   Medical Alerts

Hotel Preferences

Room Type   Smoking Preference Message to Hotel Vendor ❓
Don't Care ∨   Don't Care ∨

I prefer hotel that has:
☐ a gym ☐ a pool ☐ a restaurant ☐ room service ☐ Early Check-in

Accessibility Needs
♿ ☐ Wheelchair access ☐ Blind accessible

Car Rental Preferences

Car Type   Smoking Preference Car Transmission

- 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.

International Travel: Passports and Visas   Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports   ⊕ Add a Passport
☐ I do not have a passport

International Visas   ⊕ Add a Visa

- Assistants and Travel Arrangers – optional
  - Click Add an Assistant to add another user who can act as a proxy for making travel arrangements.

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.
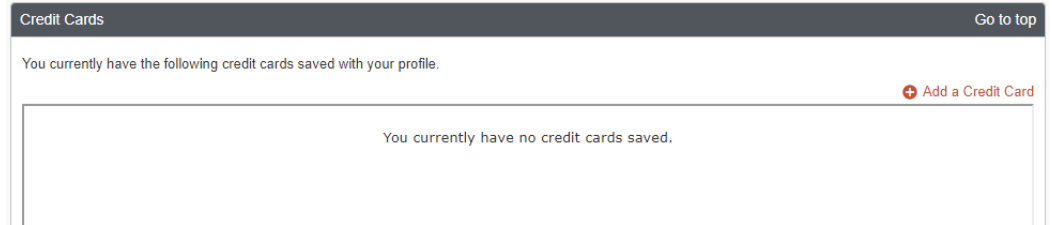☐ Refuse Self Assigning Assistants ❓
Your Assistants and Travel Arrangers   ⊕ Add an Assistant

| Test, Traveler2 | Can book travel? ⊖ | ✏ 🗑 |

- Credit Cards
  - The information for a University of Kentucky procurement card can be entered into your Profile.
  - A UK procurement card is recommended for travel; however, if desired, a personal credit card can be entered into the Profile and will be available for purchasing airfare, or reserving hotel rooms and car rentals.
  - Click Save.

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.

Request Settings

- Information, Delegates, Preferences, and Approvers are shared between Request and Expense Settings.

- Start with Request Settings and the information will carry through to Expense Settings. If changes are made to one section, the other section will automatically update. The only exception is Personal Car settings that must be created in Expense Settings.

- Request Information
  - A default departmental number will automatically populate.
  - A default departmental cost object ID will automatically populate.

Request Information

Save   Cancel

User Group	Reimbursement Currency	Dept Number
Test Users	US, Dollar	7H500

Company Code	Cost Object Type	Cost Object ID
(UK00) Company Code	(CC) Cost Center	(1013195050) CLN - DEPT

- 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.

Request Delegates

Delegates | Delegate For

Add | Save | Delete

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.

	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
☐	Test, Traveler2 concurexpense@uky.edu	☑	☑	☐	☐

- Request Preferences: Skip

- Request Approver
  - Your default approver will automatically display.

Request Approvers

Save | Cancel

Default approver for your Requests

concurexpense@uky.edu - Default Approver Test

7

	• Favorite Attendees: optional
	o Frequent attendees of Group Business Meals can be setup in the system ahead of time.
	o Click New Attendee, enter required information, click Save
	 Favorite Attendees **Attendees** Attendee Groups Find every attendee where Last Name ▾ Begins With ▾ * [Go] [New Attendee] Edit Delete <table><tr><th>☐</th><th>Attendee Name ▲</th><th>Attendee Title</th><th>Institution/Company</th><th>Attendee Type</th></tr><tr><td>☐</td><td>Test, Admin</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, COA1</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, COA2</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, IT Admin</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, Processor</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, Traveler1</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, Traveler1</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, Traveler2</td><td></td><td></td><td>Faculty/Staff</td></tr><tr><td>☐</td><td>Test, Traveler3</td><td></td><td></td><td>Faculty/Staff</td></tr></table>

Expense Settings	• Personal Car
	    o Register the personal cars that will be used
	        ▪ Click New
	        ▪ Enter the Vehicle ID as one of the following:
	            • Fed rate = personal car using normal federal mileage rate
	            • State rate = personal car using state mileage rate
	            • Reduced fed rate = personal car using the reduced federal mileage rate
	        ▪ Enter the Vehicle Type based on the Vehicle ID chosen in the previous step
	        ▪ Click Save
	    o Repeat the registration if you may need multiple mileage rates based on source of travel funds (i.e. state grant, federal grant, etc).
	    o Check with your business officer if unsure which mileage rates to use.

Other Settings	**Personal Car Registration**
	This page displays all the personal cars that have been registered. Click **New** to register another car.
	Reimbursement Method: Personal Car - Variable Rates

New   Remove

☐ Vehicle ID	Vehicle Type
☐ Federal Rate	Federal Rate

- E-Receipt Activation: **Highly Recommended** – Enables the auto collection of electronic receipts into the Concur application, from participating suppliers.
  - o Click E-Receipt Activation link.
  - o Accept E-Receipt Activation and User Agreement.
  - o You will receive a confirmation that E-Receipts has been activated

E-Receipt Activation

Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more, click here.

Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator.

- System Settings – Skip

- Connected Apps – **Highly Recommended**
  - o Tripit Pro
    - ▪ Locate Tripit Pro eligibility message on Concur home page, under Alerts.
    - ▪ Click Get It link.
    - ▪ Enter your UK email address, and a password, and click sign up.
    - ▪ Tripit will send a verification email to your UK email address. Click the link in the email to verify the account.

Connected Apps

Link your Concur account with the following partners

TripIt   When you enable TripIt integration, Concur Travel will automatically send your trips to TripIt.   Connect to TripIt

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  o 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 UK email and PIN as the password.

    ▪ Click OK, to allow Concur to send Notifications.

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.

traveler1@uky.edu   **Get Started**

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Your Concur Profile Setup is Complete!

</td>
<td>

- Questions Contact Customer Service:
  - Email – concurexpense@uky.edu
  - <mark>Web Inquiry</mark> –

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