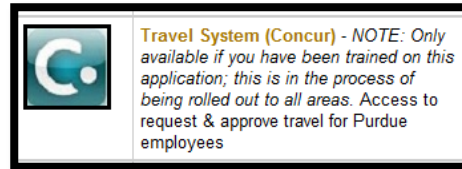


Complete or Edit Your Concur® Travel and Expense Profile

Before you book travel or create expense reports in Concur, you must first ensure that your profile is correct. Master data from SAP populates your Concur profile; however, it is important that your personal information match your I.D. card and passport. Use this QRC to complete or update your Concur profile.

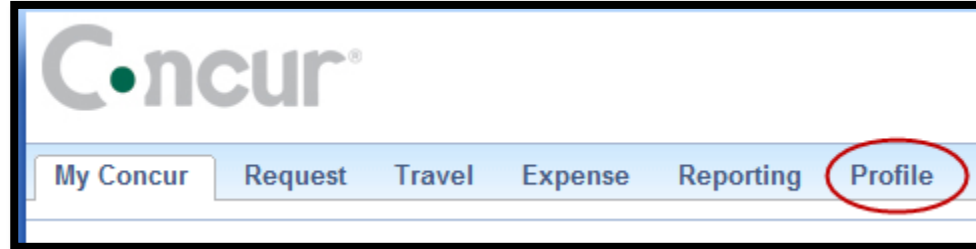
Log in to Concur

1. Go to the [Employee Portal](#) page.
2. Choose **Travel System (Concur)**.
3. Use your Career Account ID and password.
4. Click **Login**.



Update Your Information

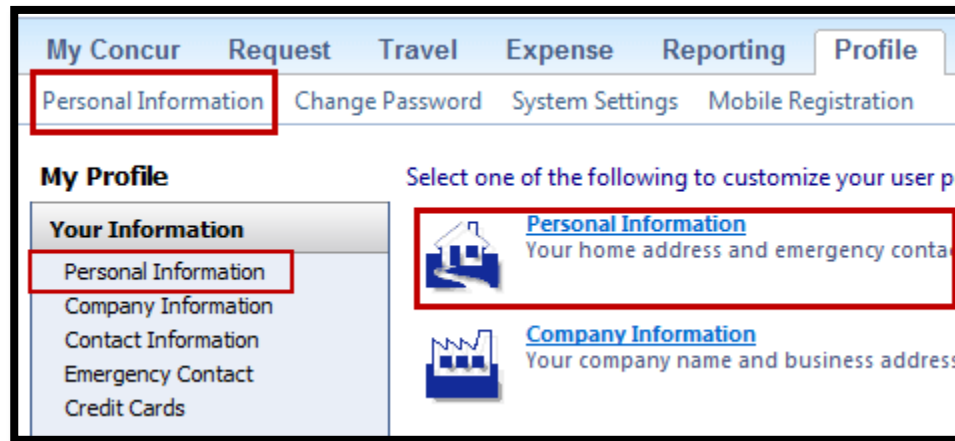
A. At the top of the **My Concur** page, click **Profile** tab.



B. Click **Personal Information**.

Note: Concur gives you four ways to navigate in the profile:

- a) Left navigation
- b) Top navigation
- c) Center icon
- d) Hover over Profile



C. Check the **Personal Information** edit and complete fields required.

Note: Some fields are pre-populated by master data as it appears in HR records of SAP. Please ensure that all information is accurate and matches your state or federal identification (driver's license, state identification card, or passport).

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 [Required] | Middle Name [Required] | Nickname | Last Name [Required] | Suffix |
|-------|-----------------------|------------------------|----------|----------------------|--------|
| Mr | Tracy | Margaret | | Never | |

No Middle Name

D. Continue to edit and complete additional fields including:

- **Work Address**
- **Home Address**
- **Contact Information**
- **Emergency Contact**

Set Travel Preferences

Check discount travel rates/fare classes for which you are eligible.

- A. Select seat preference.
- B. Select row preference.
- C. Indicate special meals preferences.
- D. Enter a city name or the airport code of your preferred airport; select the appropriate airport.
- E. Indicate any medical alerts (*i.e.*, shellfish allergy).
- F. Indicate other air travel preferences.

Complete or Edit Your Concur® Travel and Expense Profile

- A. Select room preference.
- B. Select smoking preference.
- C. Enter an additional message up to 30 characters long.
- D. Check boxes for preferred amenities.
- E. Check accessibility needs.

The screenshot shows the 'Hotel Preferences' section of a Concur profile. It includes dropdown menus for 'Room Type' (set to 'Don't Care') and 'Smoking Preference' (set to 'Non-smoking'). A text box for 'Message to Vendor' is present. Below these are checkboxes for amenities: 'a gym', 'a pool', 'a restaurant', 'room service', and 'Early Check-in'. At the bottom, there are checkboxes for 'Accessibility Needs', specifically 'Wheelchair access' and 'Blind accessible'. Callout boxes A through E point to the Room Type, Smoking Preference, Message to Vendor, amenities checkboxes, and Accessibility Needs checkboxes, respectively.

- A. Enter preferred car type. (economy, compact, intermediate and standard are within Purdue University policy)
- B. Enter smoking preference.
- C. Enter preferred car transmission.
- D. Enter an additional message up to 30 characters long.

The screenshot shows the 'Car Rental Preferences' section. It features dropdown menus for 'Car Type' (set to 'Any Car Class'), 'Smoking Preference' (set to 'Don't Care'), and 'Car Transmission' (set to 'Automatic'). A text box for 'Message to Vendor' is located at the bottom. Callout boxes A through D point to the Car Type, Smoking Preference, Car Transmission, and Message to Vendor fields, respectively.

Add Frequent-Traveler Programs to Profile

Click **Frequent-Traveler Programs** in the left sidebar menu.

The screenshot shows a sidebar menu titled 'Travel Settings'. The menu items are: 'Travel Preferences', 'International Travel', 'Frequent-Traveler Programs' (which is highlighted with a blue arrow), and 'Assistants/Arrangers'.

Click **Add a Program**.

The screenshot shows a button with a plus sign and the text '+ Add a Program'.

Complete or Edit Your Concur® Travel and Expense Profile



- A. Indicate what kind of frequent traveler program you are entering.
- B. Select the carrier, car rental company, or hotel chain from the drop-down menu.
- C. Enter your frequent-traveler/driver/or guest number.
- D. Check the **Search this vendor** checkbox to include the vendor in searches.
- E. Click **Save**.

Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent drop-down menu. Finally, enter the program number (frequent traveler number, etc.).












| | | | | |
|---|--|--|---|--|
| 1 | <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> | Carrier Select a carrier | Frequent Traveler / Driver/ Guest Number | Search this vendor <input checked="" type="checkbox"/> |
| 2 | <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> | Car Rental Company Pick a rental company | Frequent Traveler / Driver/ Guest Number | Search this vendor <input checked="" type="checkbox"/> |
| 3 | <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> | Hotel Choose a hotel chain | Frequent Traveler / Driver/ Guest Number | Search this vendor <input checked="" type="checkbox"/> |
| 4 | <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> | Carrier Select a carrier | Frequent Traveler / Driver/ Guest Number | Search this vendor <input checked="" type="checkbox"/> |
| 5 | <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> | Carrier Select a carrier | Frequent Traveler / Driver/ Guest Number | Search this vendor <input checked="" type="checkbox"/> |

Your frequent-traveler programs are listed.

- A. Click **Add a Program** to add another frequent-traveler program and number.
- B. Click the edit icon () to change program information or number.
- C. Click the delete icon () to remove a program from your profile.

Frequent-Traveler Programs

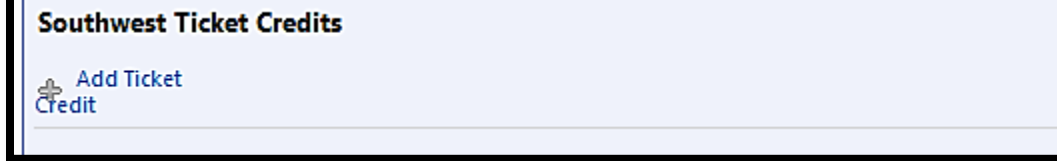
Your Frequent Traveler, Driver, and Hotel Guest Programs

| Program Type | Program Name | Search this vendor | Program Number | Edit | Delete |
|---|---|--------------------|----------------|---|---|
|  |  DELTA Delta SkyMiles | Search this vendor | 12345346 |  |  |
|  |  Enterprise | Search this vendor | 654654 |  |  |
|  |  Crowne Plaza (CP) Priority Club Group | Search this vendor | 654654 |  |  |

Add Southwest Ticket Credits to Profile

Scroll down to **Southwest Ticket Credits**.

Click **Add Ticket Credit**.



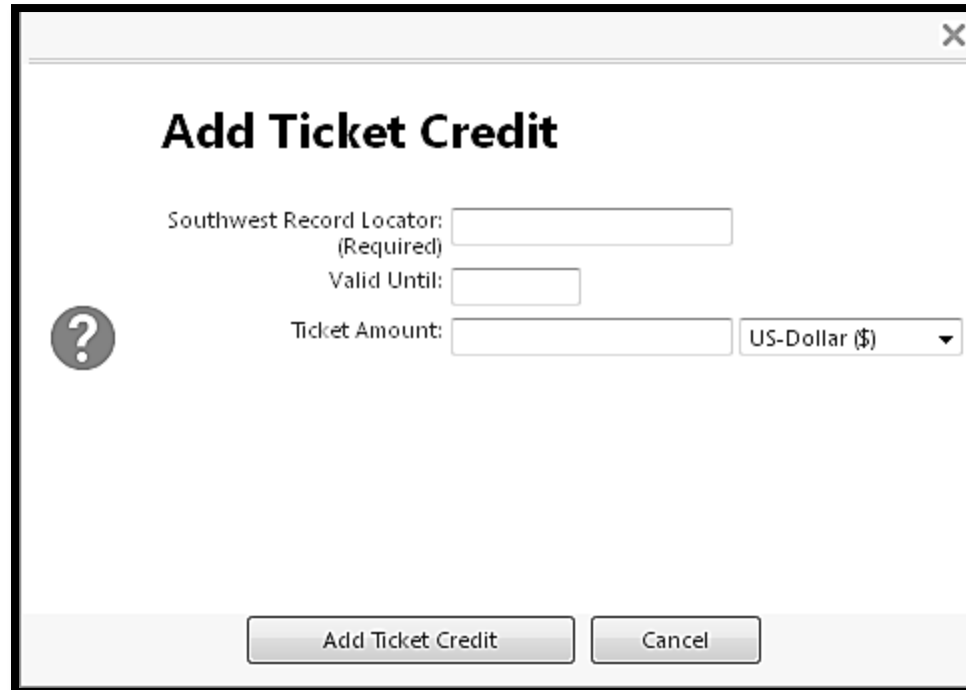
Enter **Southwest Record Locator**.

Enter **Valid Until** date.

Enter **Ticket Amounts**.

Select currency.

Click **Add Ticket Credit**.



Add TSA Secure Flight

If you are a frequent traveler and know your **DHS Redress No.** and/or **Known Traveler Number**, add them here.

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender [Required] Date of Birth (mm/dd/yyyy) [Required] DHS Redress No. TSA Pre✓ Known Traveler Number

Male Female

Add International Travel: Passports and Visas

If you travel internationally, please add your **Passports** or **Visas** numbers to your profile.

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

Passport Nationality Passport Number Passport Date Issued (mm/dd/yyyy)
 Passport Expiration (mm/dd/yyyy) Passport Place Issued (City, State / Country)

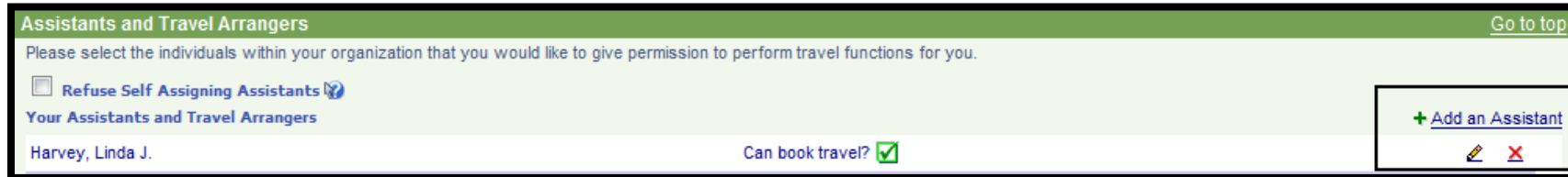
International Visa [+ Add a Visa](#)

Add a Visa

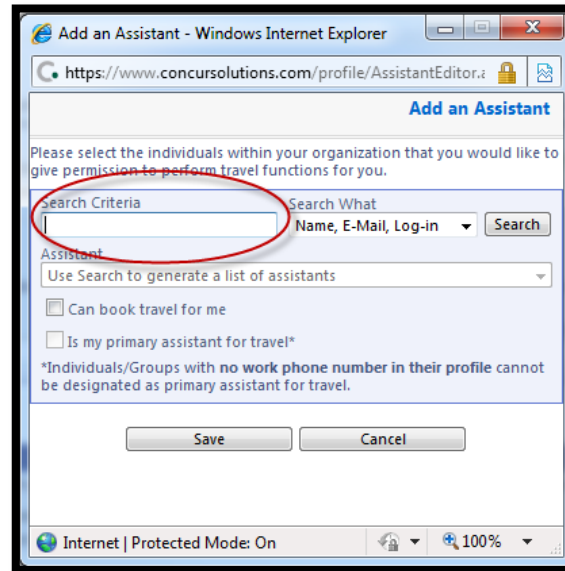
Visa Nationality Visa Number Visa Expiration (mm/dd/yyyy) Visa Type

Add Assistants and Travel Arrangers

1. A travel assistant is pre-populated for you. If you would like to add assistants, click **Add an Assistant** located to the right of the section.

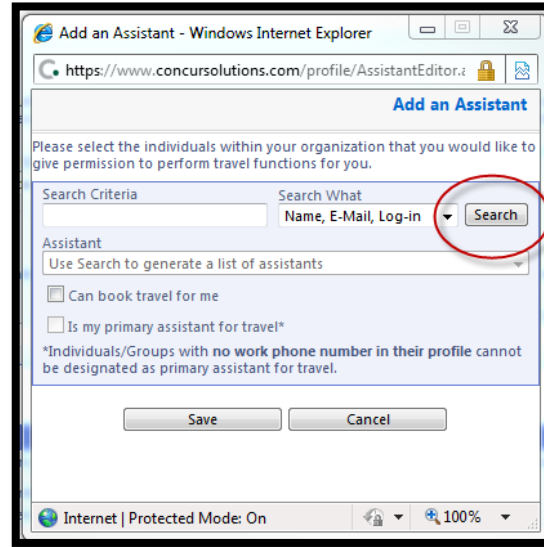


2. In the **Search Criteria** field, type the last name, email address or career account of the person you wish to add as an assistant/travel arranger.

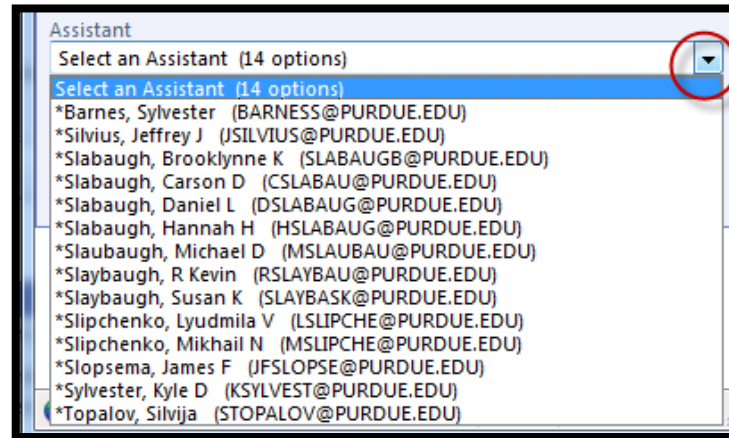


Complete or Edit Your Concur® Travel and Expense Profile

3. Click **Search**.



4. From the **Assistant** dropdown menu, select the appropriate assistant.



Complete or Edit Your Concur® Travel and Expense Profile

5. Select **Can Book Travel for Me**.

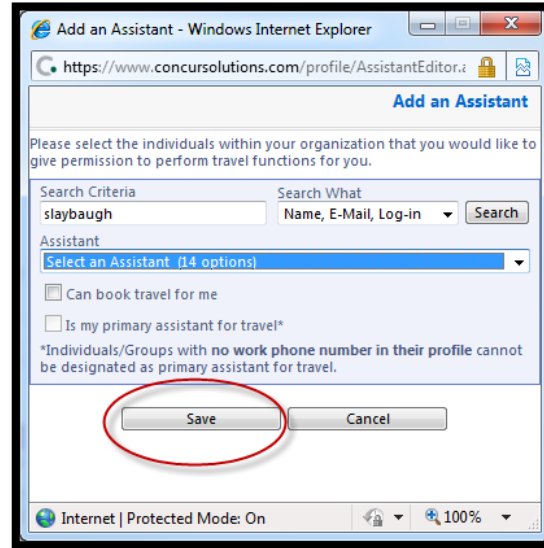
The screenshot shows a web browser window titled "Add an Assistant - Windows Internet Explorer". The address bar shows the URL "https://www.concursolutions.com/profile/AssistantEditor.a". The page title is "Add an Assistant". Below the title, there is a message: "Please select the individuals within your organization that you would like to give permission to perform travel functions for you." There are two input fields: "Search Criteria" with the value "slaybaugh" and "Search What" with a dropdown menu set to "Name, E-Mail, Log-in" and a "Search" button. Below these is a dropdown menu labeled "Assistant" with the text "Select an Assistant (14 options)". Underneath, there are two checkboxes: "Can book travel for me" (which is circled in red) and "Is my primary assistant for travel*". At the bottom of the form are "Save" and "Cancel" buttons. A note at the bottom reads: "*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel." The browser status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

6. Select **Is my primary assistant for travel**, if necessary.

This screenshot is identical to the one above, showing the "Add an Assistant" web form. In this instance, the "Is my primary assistant for travel*" checkbox is circled in red. All other elements, including the search criteria, dropdown menus, and buttons, remain the same as in the previous screenshot.

Complete or Edit Your Concur® Travel and Expense Profile

7. Click **Save**.



The screenshot shows a web browser window titled "Add an Assistant - Windows Internet Explorer" with the URL "https://www.concursolutions.com/profile/AssistantEditor.e". The page content includes a title "Add an Assistant" and a prompt: "Please select the individuals within your organization that you would like to give permission to perform travel functions for you." Below this is a search section with "Search Criteria" containing the text "slaybaugh" and "Search What" set to "Name, E-Mail, Log-in". A dropdown menu for "Assistant" is open, showing "Select an Assistant (14 options)". There are two checkboxes: "Can book travel for me" and "Is my primary assistant for travel*", both of which are unchecked. A note states: "*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel." At the bottom of the form, the "Save" button is circled in red, next to a "Cancel" button. The browser's status bar at the bottom indicates "Internet | Protected Mode: On" and a zoom level of "100%".

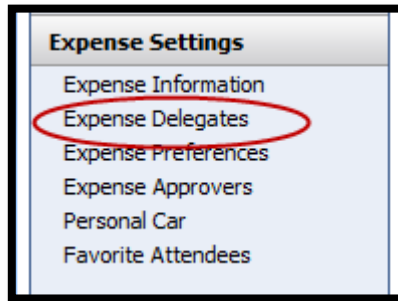
Add an Expense Delegate

Expense Delegates are employees who are allowed to perform work on behalf of other employees. Delegates have permission to prepare travel request, book travel and prepare expense reports on behalf of a traveler.

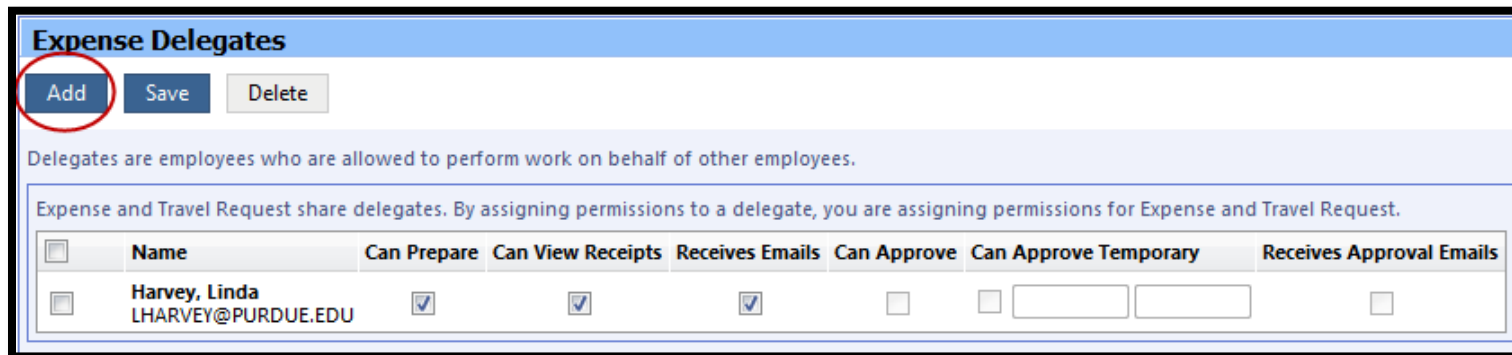
Travelers cannot delegate approvals. Travelers must approve and submit their own travel request and expense reports.

Note: Delegates inherit the traveler’s roles and can only perform the tasks for which they have permission. For example, if given permission delegates may view receipts and receive emails on a traveler’s behalf. Approvers can only delegate approval if their delegate is also an approver in the system.

1. Click **Expense Delegates** in the left navigation.



2. On the **Expense Delegates** page, click **Add**.



Complete or Edit Your Concur® Travel and Expense Profile

3. In the **Search by employee name, email address or logon id** field, type the last name, email address or career account of the delegate you wish to add. The search starts as soon as you enter the first letter.

Expense Delegates

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or logon id

KERRR@PURDUE.EDU - Rhonda Kerr Add Cancel

KERRR@PURDUE.EDU - Rhonda Kerr
KERRR@PURDUE.EDU

permissions to a delegate, you are assigning permissions for Expense and Travel Request.

| | Receipts | Receives Emails | Can Approve | Can Approve Temporary | Receives Approval Emails |
|--|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Harvey, Linda LHARVEY@PURDUE.EDU | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

4. From the list of matches, select the appropriate person.

5. Click **Save**.

Expense Delegates

Add Save Delete

6. Check the responsibilities you wish this delegate to perform on your behalf.

Note: The system does not allow you to add approver roles unless you are designated as an approver in master data.

Expense Delegates

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Travel Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Travel Request.

| <input type="checkbox"/> | Name | Can Prepare | Can View Receipts | Receives Emails | Can Approve | Can Approve Temporary | Receives Approval Emails |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Harvey, Linda LHARVEY@PURDUE.EDU | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Kerr, Rhonda KERRR@PURDUE.EDU | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

7. Click **Save** again to confirm the responsibilities you wish this delegate to perform.

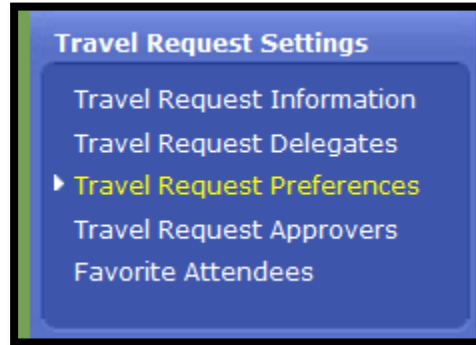
Expense Delegates

Add **Save** Delete

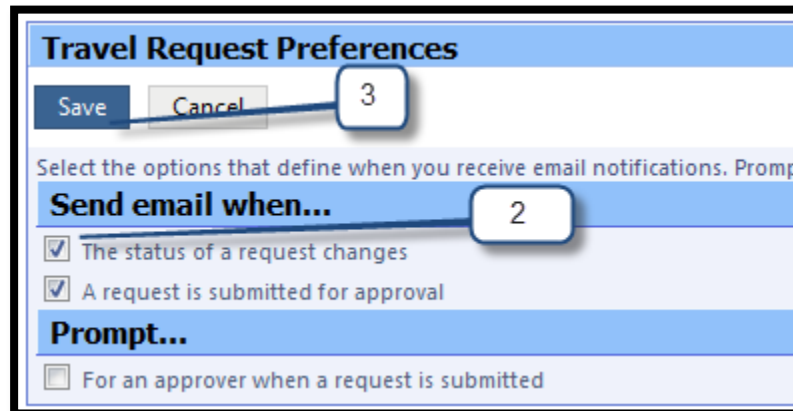
Set Travel Request Preferences

Concur sends automatically generated e-mail notices to users when the status of a request changes, or when requests have been submitted for approval. You can set your email preferences to turn on and off these system-generated notifications.

1. Click **Travel Request Preferences** in the left sidebar menu.

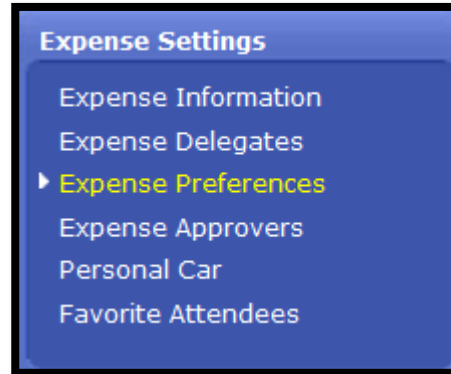


2. Check/uncheck boxes to indicate when you want to receive email notifications.
3. Click **Save**.



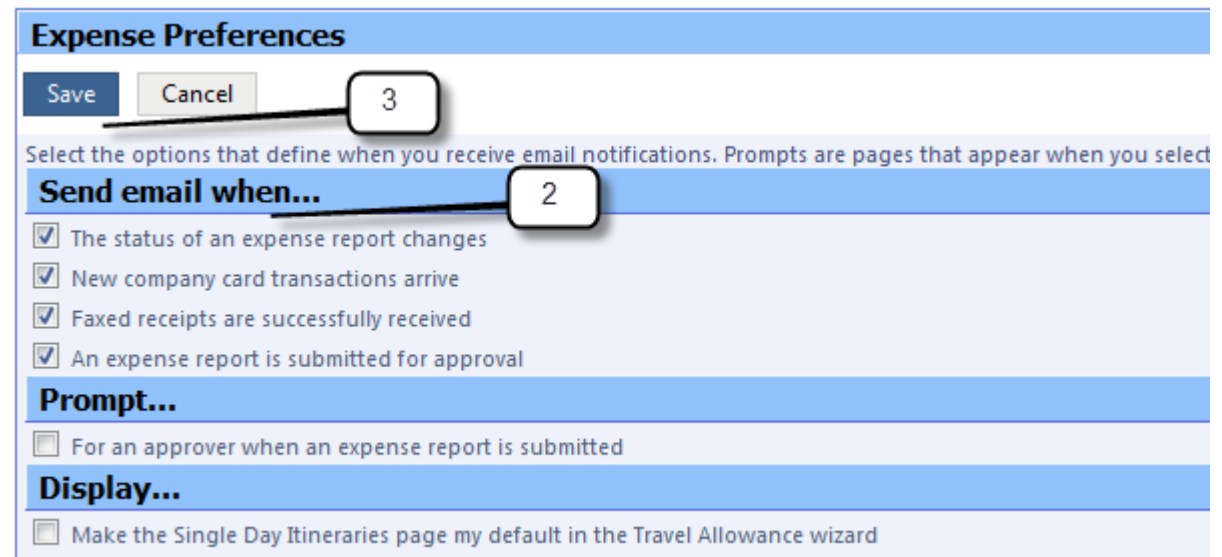
Set Expense Preferences

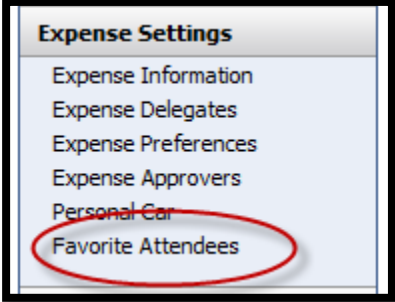
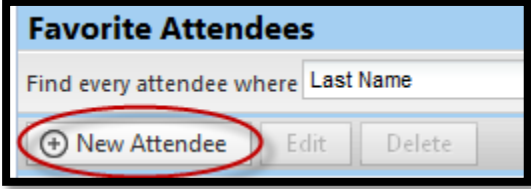
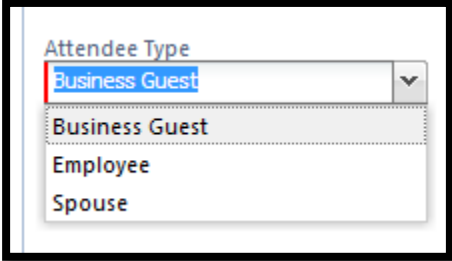
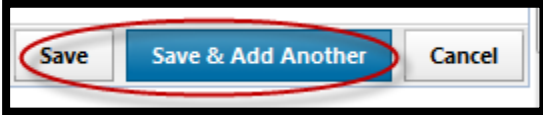
1. Click **Expense Preferences** in the left sidebar menu.

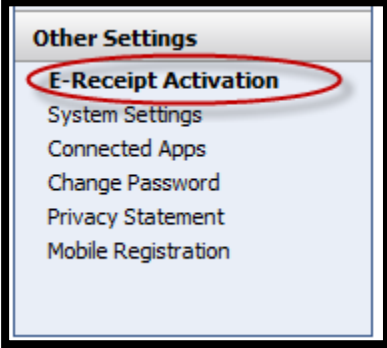
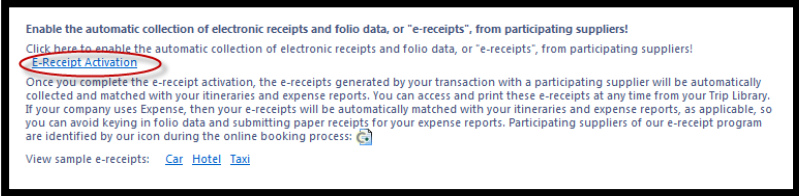



2. Check/uncheck boxes to indicate when you want to receive email notifications.

3. Click **Save**.

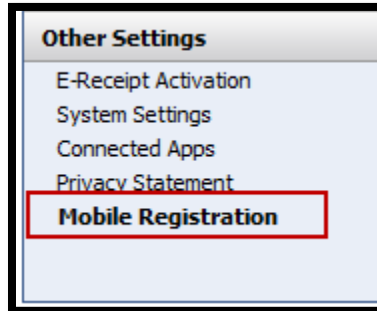


| Add a Favorite Attendee – If you expense meetings with common attendees | |
|--|--|
| 1. On the left menu, under Expense Settings , click Favorite Attendees . |  |
| 2. On the Favorite Attendee page, click New Attendee . |  |
| 3. From the Attendee Type drop-down menu, select the appropriate Attendee Type . |  |
| 4. Fill in the remainder of the fields as required. | |
| 5. Click Save or Save & Add Another . |  |

| Enable E-Receipts | |
|--|---|
| <p>1. On the Left Menu, under Other Settings click E-Receipt Activation.</p> |  |
| <p>2. Read the text and click E-Receipt Activation.</p> |  |
| <p>3. Read the text and click I Accept or I Decline.</p> |  |

Add Mobile Registration

1. Select **Mobile Registration** from **Other Settings**



2. Enter a **Mobile Pin** in text box provided and re-enter the pin in the **Verify Mobile Pin** text box
3. Click **Create/Update Mobile PIN**



| Add the App to your phone | |
|---|--|
| 1. To view what the app has to offer | iPhone: http://itunes.apple.com/app/concur-travel-receipts-expense/id335023774?mt=8 Blackberry: http://appworld.blackberry.com/ Android: http://www.concurtraining.com/customers/tech |
| 2. Load the app on your phone in whatever way you normally add apps | |