CONCUR | NAVIGATION & PROFILE SETUP

OVERVIEW
This document provides an overview for logging in, general homepage screen navigation, and Profile setup.

LOGGING IN
1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.

GENERAL NAVIGATION
Below is the main dashboard you will see when logging into Concur. A brief description of the various sections are listed below.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Concur Ribbon</td>
<td>This ribbon section displays various categories so you can navigate to a desired section, focusing on features exclusive to the selected topic. For example, click Requests from the ribbon to navigate to a view displaying Request specific information.</td>
</tr>
<tr>
<td>Help</td>
<td>This dropdown has links to Concur related reference material.</td>
</tr>
<tr>
<td>Profile</td>
<td>This section stores personal information used for booking travel, streamlining the reservation process, and creating expense reports.</td>
</tr>
<tr>
<td>Quick Task Bar</td>
<td>This section provides Quick Tasks (links) so you can quickly access features such as: start a new report, open reports and requests, and manage available expenses</td>
</tr>
<tr>
<td>Company Notes</td>
<td>This section includes important, up-to-date, UConn travel and expense related information.</td>
</tr>
<tr>
<td>My Tasks</td>
<td>This section shows your available expenses, open reports, and approvals requiring attention.</td>
</tr>
<tr>
<td>Trip Search</td>
<td>This section provides the tools you need to book a trip.</td>
</tr>
<tr>
<td>My Trips</td>
<td>Lists of your upcoming trips.</td>
</tr>
</tbody>
</table>
TRAVELER PROFILE

In Concur, your profile stores personal information used for booking travel, streamlining the reservation process, and creating expense reports. A Traveler’s profile must be updated when logging into Concur for the first time and further updated whenever relevant profile information changes.

Accessing Profile Settings

1. From the Concur homepage, click Profile and then click Profile Settings. The Profile Options view displays.

PERSONAL INFORMATION

The Personal Information section contains information such as Traveler Name, Company Information, Contact Information, and more. Review each field for accuracy and update, as appropriate.

1. On the Profile Options page, click Personal Information.
2. First Name, Last Name, Employee ID, and Company Name will automatically populate.

NOTE: Grayed out fields are not editable. If there are errors in these fields, email travel@uconn.edu for assistance.

Contact Information

1. Complete all Work Address fields.
2. Complete all Home Address fields.
3. Either a Work Phone OR Home Phone is required. Both can be entered, as desired.

NOTE: Fields marked [Required] must be completed before you can save your profile. You do not need to save after each section.

4. Click the Add a new device link to register your mobile device.

NOTE: Use of Mobile apps is optional for travelers, but if desired, registering a mobile device is required for mobile app integration/functionality.

Email Addresses

Your UConn email address will feed to your profile by default.

1. Confirm your UConn email for accuracy.
2. Click the Verify link. This will associate information forwarded from that email address to your Concur account.
3. Click OK to return to the profile.

A Verification Code is sent to your email address.

4. Copy the Verification Code from the email you receive.
5. Paste the Verification Code in the Enter Code field (under the Email Addresses section of your Profile in Concur).
6. Click OK. A confirmation message displays.
7. Click OK again.
8. Additional email accounts you may use to send itineraries, outlook invitations, and/or receipts from, click Add additional Email and then Verify, as necessary.

NOTE: Select Yes for the Contact for Travel Notifications options, as desired.

9. Complete all Emergency Contact fields.
10. Review the Travel Preferences section. Update as desired.
11. Complete **TSA Secure Flight** fields, as desired.

**NOTE:** If applicable, TSA Secure Flight REQUIRES **Gender** and **Date of Birth**.

12. International Travelers should complete **Passport** and **Visa** fields.

**Assistant and Travel Arrangers**

Assistants and Travel Arrangers are designated individuals that can assist you with the travel booking process. Assistants and Travel Arrangers CANNOT assist with Request nor Expense related tasks.

1. To add an Assistant/Travel Arranger, click **Add an Assistant** link.
2. A credit card is required in your profile to allow you to book travel through Concur.

**Credit Cards**

1. Click the **Add a Credit Card** link. *A prompt displays.*
2. Enter your UConn Travel Card information, as applicable.

3. Enter a personal credit card, if a Travel Card is not available.

**NOTE:** If a Travel Card is not available, complete the Travel Card training and apply for a Travel Card.

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**REQUEST SETTINGS**

**Request Information | Account Number**

Each travel and expense report must be associated with at least one account number and respective Account Organizations 1, 2, and 3.

Complete the Account Number (with respective Account Org) fields to reflect the **most frequently used** information for the Traveler’s business travel expenses. You can change the Account related fields for a specific report, as needed.

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1. In the **Account Number** field, enter the account (KFS number) used most frequently for your travel related expenses.
2. Click to make a selection from the list of available account numbers, to validate the appropriate account number.
3. Click the **Account Organization 1** dropdown and select the one available option.
4. Click the **Account Organization 2** dropdown and select the one available option.
5. Click the **Account Organization 3** dropdown and select the one available option.
6. Click the **Sub-Account Number** dropdown. If an option displays, click to confirm the one available option.

**Request Delegates**

Delegates are employees who are allowed to perform work on behalf of other employees. By assigning permissions to a delegate, you are assigning permissions for Expense and Request. Refer to the Delegate reference documents for additional information on **Working as a Delegate** and **Adding a Delegate**.
1. To set up a delegate click **Add**.

2. Search by employee name, email address, or UConn Net ID.

3. Select the desired employee from the drop down list.

4. Select the permissions you are granting for them.

   ✔ **TIP:** A delegate may request travel and submit for the traveler, excluding requests with cash advances.

**NOTE:** For delegates supporting 10 or more travelers, you may contact travel@uconn.edu for additional assistance.

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**Request Preferences**

Request Preferences define email notifications you receive. Modify default options as desired.

**Request Approvers**

The Request Approver section will display your direct supervisor, based on CORE CT.

**Favorite Attendees**

Those that work with larger attendee groups, refer to the Attendee Group tab to predefine large groups for easier selection when preparing Requests and submitting expenses.

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To add individual new attendees:

1. Click **New Attendee**.

2. Complete the required fields, and then click **Save**.

To add groups of attendees:

1. Click the **Attendee Group tab**.

2. Select the attendees from the list of Favorites.

3. **Name the Group** and then click **Save Group**.

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**EXPENSE SETTINGS**

**Expense Preferences**

Expense Preferences define email notifications you will receive. Modify default options as desired.

**Expense Approvers**

The Expense Approver section will display your direct supervisor, based on CORE CT.

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**OTHER SETTINGS**

**E-Receipt Activation**

Enable this setting to allow vendors to send e-receipts directly to your UConn email address.

**System Settings**

System Settings define Regional settings, language and other calendar settings. Modify default options as desired.

**Connected Apps**

See the Mobile app reference document for mobile related instructions.

**Concur Connect**

Once Concur mobile app is setup, the option to revoke access is available from this view.

In the event that a Traveler loses their mobile device, or replaces their device, click the **revoke access** link.

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**ADDITIONAL SUPPORT**

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to https://concurproject.uconn.edu/home/