

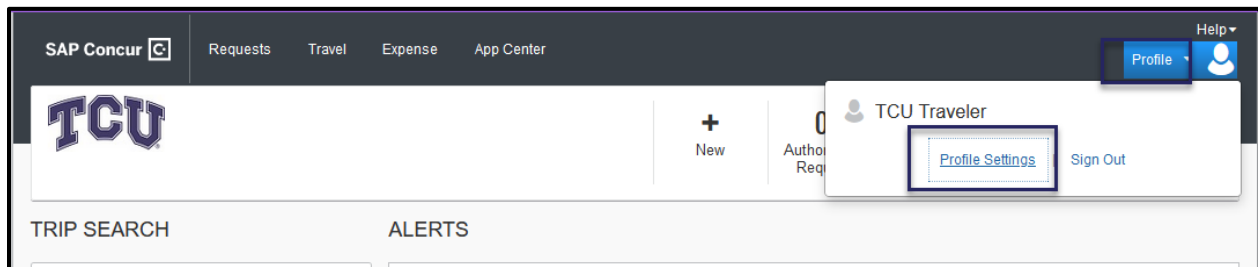


Concur Travel and Expense Quick Reference Guide

Overview: To leverage Concur's full functionality, we are asking all TCU employees to take a few steps to ensure appropriate set-up and to activate mobile applications associated with the Concur tool. Steps outlined in this document must be completed by the employee.

Step 1 – Access Profile Options

To access **Concur Login** go to <https://tcu.okta.com>, select **SAP Concur** and log in with the SSO link. From the Concur Home Page, select **Profile** and **Profile Settings**.



Step 2 – Validate Name and Work Phone

From **Profile Options**, select **Personal Information**. Validate that the first, middle, and last name populated from SAP matches the name on the government issued identification you use for travel. If changes are necessary in the greyed-out section, contact Human Resources (HR) and request a name change/correction. Concur does not have the ability to change this – it comes direct from HR. Scroll to **Contact Information** and enter work phone and alternate phone number. Select **Save** to save your changes.

Please note: Additional profile data such as phone number and TSA information may be required to save within your profile for the first time.

My Profile - Personal Information

Jump To:

Personal Information

Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

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 [Required]	Middle Name [Required]	Preferred Name	Last Name [Required]	Suffix
<div></div>	<div>TCU</div>	<div></div>	<div></div>	<div>Traveler</div>	<div></div>
	<div><input type="checkbox"/> No Middle Name</div>				

Step 3 – Verify Email

From **Personal Information**, scroll down to **Email Addresses**. Your TCU email address will be preloaded. Select **Verify**. Log into the email account entered to retrieve the verification code. If you don't see the verification code in your Email be sure and check your spam files/folder. Enter the verification code and select OK. Once your email is verified you may send receipts to receipts@expenseit.com and travel itineraries booked outside of Concur to plans@tripit.com. Once receipts and travel itineraries are received and processed by Concur, they will be available for use in Concur. A validated email address is also required for login to the mobile app.

Email Address	Verify	Contact?	Actions
Email 1 toutraveler@tcu.edu	Not Verified Verify	Yes	

Step 4 – Activate E-receipts

From the **Profile Options** page, select **E-Receipt Activation**. Select Enable from the E-Receipt Activation page and then I Agree to the E-Receipt Activation terms.

Please Note: Opting into e-receipts is not required however, having e-receipts eliminates the need to upload additional supporting documentation for many travel expenses.

E-Receipt Activation

Save time on your expense reports. When you enable e-receipt syncing, receipts from participating suppliers will be added to your SAP Concur account and used to pre-populate expenses for you. [Enable](#)

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator.

Step 5 – Travel Preferences

From the **Profile Options**, on the left side menu, under **Travel Settings**, select **Travel Preferences**. Here you can indicate your travel preferences, such as seat preference, preferred car/hotel type, you may also enter your frequent traveler program details.

Please note: Travel preferences will also be sent Anthony Travel for use when booking travel directly with a travel agent.

Travel Preferences
Go to top

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

Don't Care
Don't Care
☐ Foam pillows
☐ Rollaway bed
☐ Crib

Message to Hotel Vendor

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

Any Car Class
Don't Care
Automatic

Message to Car Rental Vendor

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs
Add a Program

No programs defined

Step 6 – TSA Secure Flight and International Travel Documents

From Profile Options, on the left side menu, under **Travel Settings**, select **International Travel**. Here you can enter your TSA Secure Flight details including TSA Precheck and Redress information. If you plan on travelling internationally you can also enter your Passport and Visa information. Select **Save** to save your changes.

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

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

Save

Step 7 – Credit Card (TCU issued Travel Card only)

From **Profile Options**, select the **Credit Card** Information link. Select **Add a Credit Card** then enter your **TCU Travel Card** details and card billing address. Select **Save**.

Add a Credit Card

* Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) *

Your name as it appears on this card *

TCU Traveler

Card Type *

Credit Card Number *

Expiration Date *

10

2022

Use this card as the default card for:

☐ Car Rentals ☐ Hotel Reservations

Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate.

Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street *

Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City *

State *

Zip/Postal Code *

None Selected

Country/Region *

United States of America

Cancel

Reset


Save

Step 8 – Download and Access the Concur Mobile App

8.1 From the Apple or Google Play app store (search “SAP Concur”) or select Concur Mobile Registration from the Profile Options page to access links to the appropriate app store.


DOWNLOAD THE APP

Email a link to download the app on a mobile device



Download on the
App Store


[View on App Store](#)




GET IT ON
Google Play

[View on Google Play](#)

8.2 Open the App and sign in with your TCU credentials or via the SSO link.



Sign In



[tcutraveler@tcu.edu](#)

[Sign in with your password](#)

Step 9 – TripIt Mobile App – Encouraged for all Travelers


TCU agreement with Concur includes access to TripIt Pro. TripIt Pro makes it easy to organize your travel plans. You can also use it to import travel booked outside of Concur into Concur.

From the Concur Home Page, select the **App Center** tab along the top of the screen. On the App Center page, select the **TripIt app** icon and then Connect.

App Center

[Need Help?](#)

[Back to App Center](#)



TripIt

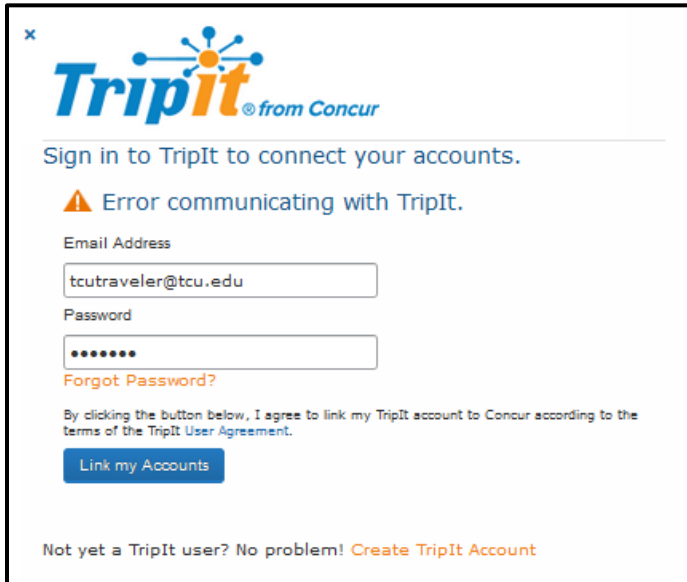
An easier trip, every time

Connect to TripIt, the world's highest-rated travel-organizing app, to access every trip in one place. Plus, TripIt Pro helps you stay one step ahead, from planning to landing.

Whether it's a week-long conference or a weekend away, TripIt will create a comprehensive itinerary for every trip. As soon as you book a flight, hotel, car, or other reservation, simply forward it to plans@tripit.com, and we'll automatically add it to your trip. Plus, bookings made with Concur Travel or TripLink travel partners will be

If you already have a TripIt account enter your credentials and select **Link My Accounts**. **For existing users please ensure your TCU email address is the primary address in your TripIt account.**

If you are new to TripIt select the Create TripIt Account and register with your TCU email address.

A screenshot of the TripIt login interface. At the top is the TripIt logo with the tagline "from Concur". Below the logo, it says "Sign in to TripIt to connect your accounts." There is an orange warning triangle icon followed by the text "Error communicating with TripIt." Below this, there are input fields for "Email Address" (containing "tcutraveler@tcu.edu") and "Password" (displayed as dots). A "Forgot Password?" link is below the password field. A blue button labeled "Link my Accounts" is at the bottom. At the very bottom, it says "Not yet a TripIt user? No problem! Create TripIt Account".

In the app stores there are two versions of TripIt, (TripIt: Travel Planner and TripIt Pro (1 Year)). Be sure to download the **“TripIt : Travel Planner”** app (not TripIt Pro 1 Year). Activating your TripIt account from within Concur upgrades your TripIt experience to TripIt Pro at no charge.

Step 10 (Optional) – Add Expense and Request Delegates

If you wish to authorize someone else to create and submit expense reports or travel requests on your behalf, you can designate delegates.

To set an expense/request delegate, from the Profile Options page select Expense Delegates.

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

Change your password.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

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

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration

Set up access to Concur on your mobile device

From the Expense Delegates screen select Add, then search, and locate your delegate. Selecting the user from the list adds them to your delegate list.

The last step is to assign privileges to your delegate(s). Check the boxes for the tasks you wish your delegate to perform on your behalf. To complete the process select Save.

Delegates are generally assigned to either create and submit reports or requests on your behalf, or to approve on your behalf.

Note: Expense users are expected and required to do the actual submitting of all expense reports. Delegates are able to prepare and attempt submission of the expense report(s) to ensure that the report is complete and ready.

The example below shows the typical settings for a delegate to create and submit reports/requests on your behalf.

Expense Delegates

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 Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> ALIAS TEST, Financial/Budget Approver (AA1) AA1@tcu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The example below shows the typical settings for a delegate to act as an approver on your behalf.

Expense Delegates

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 Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> ALIAS TEST, Financial/Budget Approver (AA1) AA1@tcu.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The individual options explained.

Can Prepare - If selected (enabled), the delegate can create expense reports and requests on behalf of another employee.

Can Book Travel – If selected (enabled), the delegate can arrange travel on your behalf.

Can Submit Reports - If selected (enabled), the delegate can submit cash advances and expense reports on behalf of another employee. This doesn't allow actual submission but allows a delegate to review and resolve any policy related warnings and violations.

Can Submit Requests - If selected (enabled), the delegate can submit requests on behalf of another employee.

Can View Receipts - If selected (enabled), the delegate can view receipt images on behalf of another employee.

Can Use Reporting - If selected (enabled), the delegate can use Intelligence reporting) on behalf of another employee.

Receives Emails – If selected (enabled) the delegates will receive the following emails

- Workflow status change notifications
- Email reminders
- Image received notification
- New company card transactions notification

Can Approve - If selected (enabled), the delegate can approve reports/requests on behalf of another employee. There is no time period associated with this action.

Can Approve Temporary - If selected (enabled), the delegate can approve reports/requests on behalf of another employee for a specified period of time. The user making the delegate assignment is required to enter the start and end dates for the delegation.

Can Preview For Approver - If selected (enabled), the delegate can preview expense reports and requests on behalf of another employee.

Receives Approval Emails - If selected (enabled), the delegate will receive the following emails.

- New report/request/cash advance pending your approval notifications
- Email reminders to the approver

Note to approvers: To assign the Can Approve function to allow a delegate to approve on your behalf your selected delegate must also be designated as an approver via the TCU HR feed.

Questions? Visit our new travel site for training documents and resources or email concur@tcu.edu.