# 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**.
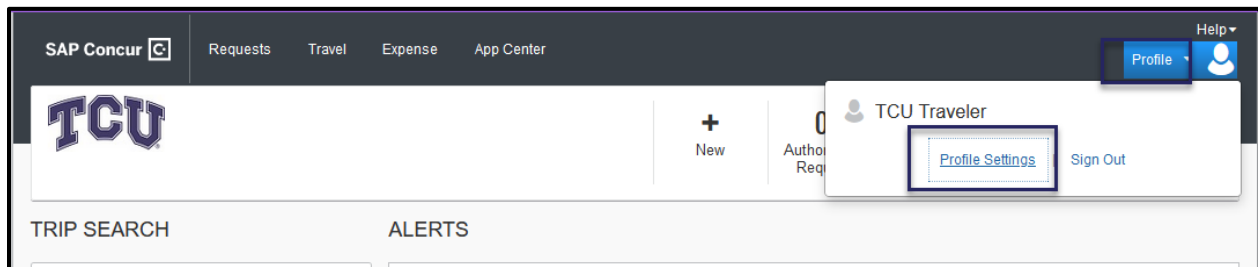
Step 2 – Validate Name and Work Phone

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.

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 Addresses					Go to top
Please add at least one email address.					
▶ How do I add an email address?					
▶ How do I verify my email address?					
▶ Why should I verify my email address?					
▶ Travel Arrangers / Delegates					
					➕ Add an email address
	Email Address		**Verify**	**Contact?**	**Actions**
Email 1	tcutraveler@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 note 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.

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.

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.**

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.

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

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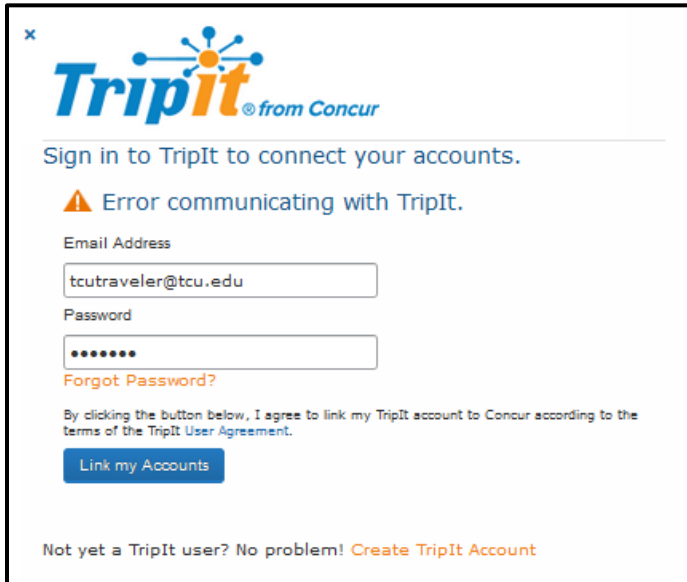
If you already have a TripIt account enter your credentials and select Link My Accounts. For existing users please ensure your <u>TCU email address is the primary address</u> in your TripIt account.

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

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 1Year). 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.

Expense Delegates

| Delegates | Delegate For |

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 login id

tra   Add   Cancel

traveler@tcu.edu - Traveler TEST
traveler@tcu.edu
User ID: TRVLRTEST
Logon ID: traveler@tcu.edu
*Department: Fund Raising

Traveler, TCU
tcutraveler@tcu.edu
User ID: tcutravelel1
Logon ID: tcutraveler@tcu.edu

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

| ...bmit ...sts | Can View Receipts | Can Use Reporting | Receives Emails | Can Approve | Can Approve Temporary | Can Preview For Approver | Receives Approval Emails |

...cords found.

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.

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

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.