



Updating Your Concur Travel Profile

Overview

Before using the Concur Travel booking tool for the first time, you **MUST** update your Travel Profile. The required fields will be notated in **red** in Concur.

Concur can be accessed through TCU SSO <https://tcu.okta.com>.

1. From the Concur Home Page select **Profile > Profile Settings**.
2. The **Profile Options** page appears.
3. You can navigate to specific sections of your profile from the links on this page.
4. Selecting **Personal Information** will take you to the beginning of the profile page. From there, you may scroll down and update the individual sections on one long webform. Be sure to save your settings when you are done with your updates.

The screenshot displays the SAP Concur user interface. At the top, there's a navigation bar with 'SAP Concur' logo and links for 'Requests', 'Travel', 'Expense', and 'App Center'. A 'Help' dropdown is on the right. Below this is a sub-navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Concur Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and includes a sub-header 'Select one of the following to customize your user profile.' A red box highlights the 'Personal Information' link in the left sidebar. The sidebar also lists other sections like 'Your Information', 'Travel Settings', 'Request Settings', 'Expense Settings', and 'Other Settings'. The main content area lists various settings sections such as 'Personal Information', 'Company Information', 'Credit Card Information', 'Travel Vacation Reassignment', 'Request Preferences', 'Change Password', 'System Settings', 'Contact Information', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'.

Section One:

The top of the profile contains a *Jump To*: dropdown for easy navigation to specific profile sections.

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

TCU Traveler

☐ No Middle Name

- Verify that the First, Middle, and Last name fields are identical to those on the photo identification that you will be presenting at the airport.

Section Two:

The Company Information section contains:

- Manager
- Employee Position/Title
- Marriott Athletics VIP Card Expiration Date

Company Information

Manager Employee Position/Title

TCU Approver

If you have a Marriott Athletic VIP Card, please enter the expiration date here:

Save

Section Three:

The Work Address section contains:

- Company Name
- Assigned Location
- Address

Work Address

Company Name: Texas Christian University

Assigned Location: TCU Campus (Fort Worth, TX)

Street: 2800 South University Drive

☒ Address same as assigned location

City: Fort Worth

State/Province: TX

Postal Code: 76129

Country/Region: United States of America

Save

Section Four:

The Home Address section contains:

- Home Address

Home Address

Street:

City:

State/Province:

Postal Code:

Country/Region: United States of America

Save

Section Five:

The Contact Information section contains:

- Work Phone
- Home Phone
- Mobile Phone

Note: You must enter a Work or Home Phone and you are encouraged to enter your cell phone. These numbers will be used to communicate flight changes or disruptions to you.

Contact Information

Work Phone^[Required**]: 817-555-1219

Work Extension:

Work Fax:

2nd Work Phone/Remote Office:

Home Phone^[Required**]: 817-555-1999

Pager:

Other Phone:

Mobile Phone Country/Region:

Mobile Phone:

****You must specify either a home phone or a work phone.**

Save

Section Six:

The Email Addresses section contains:

- Email Addresses – Your TCU Email Address should already be populated in this area. You will need to **Verify** it. You may also + **Add an Email Address** to receive additional notifications.

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](#)

Email Address	Verify	Contact?	Actions
Email 1 toutraveler@tcu.edu	<input checked="" type="checkbox"/> Check email for code	Yes	Resend Cancel

Enter Code

[+ Add an email address](#)

1. **Verifying your TCU Email** address allows Concur to match information (receipts, itineraries) forwarded from that Email address to your Concur account.
 - a. Select **Verify**.
 - b. Check your email for a verification message from Concur.
 - c. **Copy the code** from the email and **paste into the Enter Code field** next to the email address back in the Concur profile – email addresses section.
 - d. Select **OK** to submit the code and complete verification. Your email will now show as verified in green.

Note: With your verified email you can also forward receipt emails to receipts@concur.com. Once Concur receives and processes your emails receipts will be available in the Concur Receipt Store.

Section Seven:

The Emergency Contact section contains:

- Emergency Details – The individual you list here will be contacted in the event of an emergency if you cannot be reached.

Emergency Contact Go to top

Name Relationship

Street ☒ Address same as employee

City State/Province Postal Code

Country/Region Phone Alternate Phone

Section Eight:

The Travel Preferences section contains:

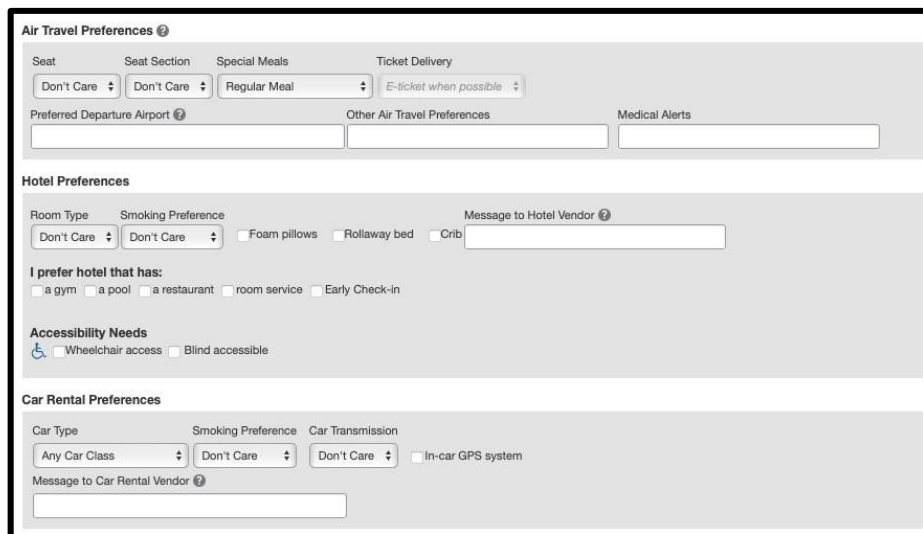
- Eligible Discount Rate/Fare Classes – By checking the rates you are eligible for; Concur Travel will display available discount rates/fare classes when booking travel. You must have proof of eligibility at travel/check-in, otherwise your booking may be canceled.



The screenshot shows a form titled "Travel Preferences". Below the title, it says "Eligible for the following discount travel rates/fare classes". There are four checkboxes: "AAA/CAA", "Government", "Military", and "Senior/AARP".

- Air, Hotel, and Car Rental Preferences – Concur Travel will automatically apply saved preferences to your bookings and reservations.

Note: Concur collects your preferences and provides them to airlines or travel agencies but cannot guarantee these preferences will be honored for every reservation.



The screenshot shows three sections of preferences:





















- Air Travel Preferences**: Includes fields for Seat, Seat Section, Special Meals, Ticket Delivery, Preferred Departure Airport, Other Air Travel Preferences, and Medical Alerts.
- Hotel Preferences**: Includes fields for Room Type, Smoking Preference, Message to Hotel Vendor, and checkboxes for "I prefer hotel that has:" (a gym, a pool, a restaurant, room service, Early Check-in) and "Accessibility Needs" (Wheelchair access, Blind accessible).
- Car Rental Preferences**: Includes fields for Car Type, Smoking Preference, Car Transmission, and Message to Car Rental Vendor.

- Frequent Traveler Programs –
 - Select [+] Add a Program
 - Select the vendor and enter your rewards number or ID (can enter up to five travel vendors at a time). o Select Save o Repeat as needed.

Note: To ensure you receive proper frequent traveler credit, ensure the name on your reward program matches your photo ID as well as the name saved in Concur.

Frequent-Traveler Programs

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

	American Airlines AA Advantage	Search this vendor			
	Delta SkyMiles	Search this vendor			
	Southwest Rapid Rewards	Search this vendor			
	Hertz Hertz Gold Plus Rewards	Search this vendor			
	Hilton (All) (EH) Hilton HHonors	Search this vendor			

- Unused Tickets – Credits for unused flights booked in Concur Travel are automatically saved and appear here and will be available when booking future flights on Concur Travel.
- Southwest Ticket Credits – May be manually added in your profile for use when booking Southwest on Concur Travel.

Unused Tickets




Southwest Ticket Credits

+ Add Ticket Credit

- TSA Secure Flight – contains TSA required and optional PreCheck information. Make sure these items match the government issued ID you will use when traveling.
 - Gender
 - Date of Birth
 - DHS Redress No (Having a value for this field is rare. You will know if you have one.)
 - TSA Pre-Check, Known Traveler Number, or Global Entry Pass ID – if applicable

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

Section Nine:

The International Travel: Passports and Visas section contains:

- Passports and Visas – Securely store your passport and visa information. This will allow Concur to automatically include the information in your international reservations. Alerts will prompt you when your passport or visa is about to expire.
 - Select [+] **Add a Passport** or [+] **Add a Visa**
 - Enter the information.

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

Section Ten:








The Credit Cards section contains:

- **Credit Cards** – In this section you will add and securely store the card information used to purchase or reserve travel arrangements.

Credit Cards
Go to top

You currently have the following credit cards saved with your profile.

+ Add a Credit Card

Card Type	E-Receipt Enabled	Display Name	Sponsored Card	Credit Card Number	Expiration Date	Default	Update/Delete
		Personal Amex		***0000	Exp: 10/2025		 
		TCU Pard		***1111	Exp: 10/2026		 

Save

To add a card:

1. Select Add a Credit Card
2. Fill out the required fields noted with a red asterisk (*).
3. Billing Address: For TCU P-Cards this is most likely your office address.
4. Select Save
 - a. Notice all but the last 4 digits of the saved card number are masked for security purposes.
 - b. You can edit or delete a credit card by selecting on the pencil or trashcan icon.

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

Section Eleven:

You should now be to the bottom of the **My Profile – Personal Information** page.

1. Select the blue Save button at the bottom of the screen under the Credit Cards section.



2. Make sure you see the Profile Saved message



Section Twelve:

Delegates

If you wish to authorize someone else to assist with creating expense reports or travel requests on your behalf, you can designate delegates.

To set an expense/request delegate, from the Profile 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 screen showing the 'Add' button and search results for 'Traveler, TCU' and 'Traveler TEST'.

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

Traveler, TCU
tcutraveler@tcu.edu
User ID: tcutraveler1
Logon ID: tcutraveler@tcu.edu

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

Submit	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails

Records 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.

Expense 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.

<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
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.

<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.

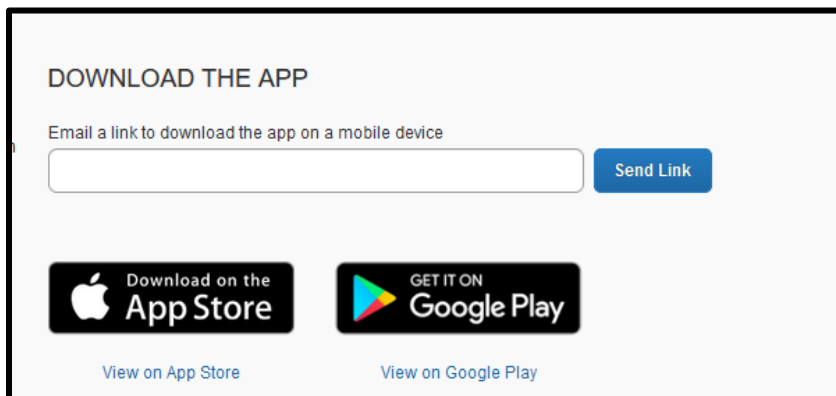
- New report/request/cash advance pending your approval notifications
- Email reminders to the approver

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.

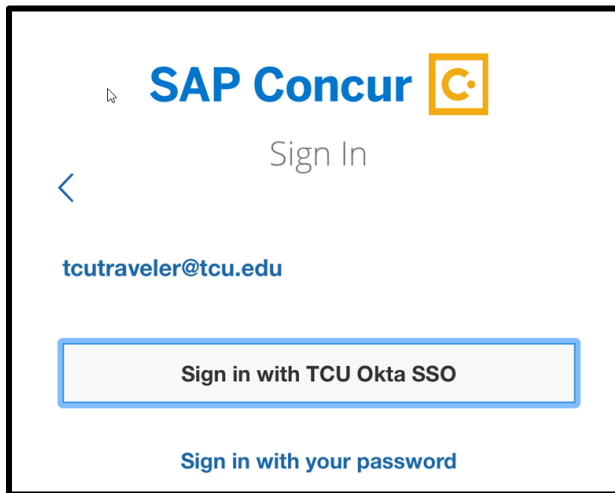
Section Thirteen

Concur Mobile Registration and App

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.



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

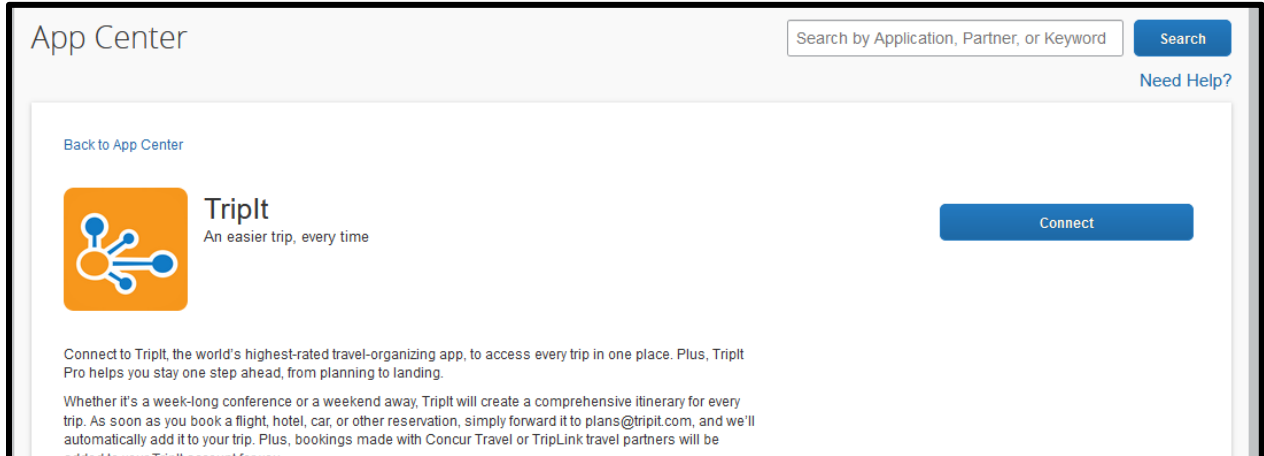


Section Thirteen

TripIt Pro Mobile App


TripIt helps organize your travel plans no matter where you book them. Simply forward your plans to plans@tripit.com and TripIt will organize your trips and make business trip segments available in Concur Travel and Expense.

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

x



TripIt® from Concur

Sign in to TripIt to connect your accounts.

 Error communicating with TripIt.

Email Address

Password

[Forgot Password?](#)

By clicking the button below, I agree to link my TripIt account to Concur according to the terms of the [TripIt User Agreement](#).

Link my Accounts

Not yet a TripIt user? No problem! [Create TripIt Account](#)

Be sure to download the TripIt app from your preferred app store.