Step-by-Step Guide:
Logging into Concur for the First Time

This document is will guide you through the necessary steps when accessing your Concur profile for the first time. Included are logging in, reviewing and updating your profile information, activating e-receipts, adding travel rewards programs, credit cards, assigning travel arrangers and expense delegates, and more.

Accessing Your Concur Portal

Concur is a web-based software platform, available to access on your desktop, laptop, smartphone, or tablet. When signing in for the first time, it is recommended to use a full browser on a desktop computer or laptop. Please note that Concur performs best when accessed through the latest version of the Microsoft Internet Explorer web browser, but should operate on most browsers. If site functionality appears to be an issue, first try upgrading your browser to the latest version.

1. Navigate to www.concursolutions.com

2. Login using your TU e-mail address as your User Name and your Trinity Employee ID number (full seven digits—including any leading zeros) as your password. If it does not work with leading zero(s), try without.

3. You will then be prompted to update your password.

4. You will be brought to the Home Screen and are now ready to first review and update your profile information and settings. Ignore any alerts for now.
Concur Profile Information and Settings

Why update your Concur Profile?

Your profile within the Concur system securely stores your personal information, some of which is required by the federal Transportation Security Administration (TSA) to fly. Your Concur profile information will be referenced when you book a trip through Concur Travel or directly with a Corporate Travel Planners (CTP) travel agent.

Who can update your Concur Profile?

Ultimately, you are in charge of your Concur Profile. Some information will be pre-populated for your review. Most of the required information can be updated by yourself, your delegate, or your travel arranger. Please note that the exception to this is your first and last name. Please review these, and if a correction needs to be made to match your government-issued ID, please contact the Financial Services Center to have it updated. Some of the additional information can only be updated by yourself or your travel arranger—not by your delegate (note: delegates and travel arrangers must first be assigned by the user in profile settings - the process will be outlined in this document as well).

Accessing Your Concur Profile

1. Click the Profile drop-down menu in the upper-right corner of the Home Screen and select Profile Settings.

2. Click Personal Information (toward the top-left of the screen)

Reviewing/Updating Your Concur Profile

In order from the top of the screen scrolling through to the bottom of the page. Required information will be indicated in Red font.

1. Name: Review your first and last name. If a correction needs to be made to match your government issued ID, contact the Financial Services Center. Add your middle name to match your ID. If no middle name, check the “no middle name” box.
Reviewing/Updating Your Concur Profile, Continued.

2. Company Information

- **Employee ID**

- **Manager**: This should be your immediate supervisor or the person responsible for travel management within your department. Please contact the Financial Services Center if your Manager should be updated.

- **Employee Position/Title**.

- **Department**: Drop-down menu.

3. Work Address

4. Home Address

5. Contact Information

- **Phone Number**: You are required to specify one phone number in either the Work or Home Phone field. The number you provide will be the number an airline will attempt to contact you at in the case of an emergency. As such, it is highly recommended you enter your mobile number in the Work Phone field instead of in the actual Mobile Phone field.
Reviewing/Updating Your Concur Profile, Continued.

6. Email Addresses: Your Trinity Email address should already be populated in this area. You will need to verify it, and you can also add additional Email addresses if you wish.

- In verifying your Trinity Email address you are giving Concur the ability to associate information forwarded from that Email address, the Concur mobile apps, or the apps of Concur partners (such as Starbucks, Uber, AirBnB, etc.) to your account. Simply click Verify and the system will send a Verification Code to this Email address. Copy the code from the Email and paste it into the Enter Code field back on the Concur page.

7. Emergency Contact: The individual you list here will be contacted in the event of an emergency.

8. Travel Preferences

- Eligible Discount Classes: Trinity employees are not eligible for Government or Military fares when traveling for University business.

- Air, Hotel, and Car Rental Preferences: Please note that any preferences you list here will limit your search results accordingly when booking travel reservations. For example, if you choose Aisle under Seat preference, your search results would not return any flights where an aisle seat is not available. Likewise, if you choose Compact Car as your Car Type preference, your car rental search results will be limited to only cars in that class. Therefore, it is recommended as a best practice to leave these fields blank in order to choose from the most robust and accurate list of options currently available at the time of your search.
Reviewing/Updating Your Concur Profile, Continued.

8. Travel Preferences, Continued

- **Frequent Traveler Programs:** One benefit with Concur is that you are still eligible to accrue your own rewards points on your accounts with various air, hotel, and car travel vendors’ rewards programs. Simply click [+ Add a Program and you can enter your rewards number or ID for up to five travel vendors at a time. You will then need to opt-in by clicking the blue I Agree button once your programs are added.

- **Unused Tickets and Southwest Ticket Credits:** If you have any unused tickets or credits, they will automatically appear here and you may review them at any time in these sections.

- **TSA Secure Flight**
  - Gender
  - Date of Birth
  - DHS Redress No. and TSA Pre-Check Known Traveler Number

9. International Travel—Passports and Visas: Click [+ Add a Passport or [+ Add a Visa and enter the information. Providing this will allow Concur to automatically include the information in your international reservations.

10. Assistants and Travel Arrangers: In this section, you may select other Concur-profiled Trinity employees that you would like to give permission to perform travel functions for you such as booking travel or updating your travel profile. Note: if you check “Refuse Self Assigning Assistants,” a Concur administrator in the Financial Services Center will not be able to proxy into your account and assist you with travel functions.

   1. Click [+ Add an Assistant
   2. Begin entering your assistant’s name in the Assistant field, and select it from the list of choices that pops up.
   3. Check the “can book travel for me” box.
   4. Note: Primary assistants will receive all the same travel Emails the traveler does.
Reviewing/Updating Your Concur Profile, Continued.

11. Credit Cards: In this section you will securely store the card information you will use to purchase travel arrangements. There are a few important items of note:

1. You must not enter a Trinity Purchasing Card (P-card) in this section. P-cards may no longer be used for travel expenses.

2. With the implementation of Concur, the University enrolled in a Corporate Travel Card program (referred to henceforth as Travel Card) with JP Morgan Chase for procurement and reconciliation of travel expenses only. Submit an application for a Travel Card to the Financial Services Center. Your Travel Card expenses will automatically feed into Concur, allowing you to assign them to expense reports with ease.

3. It is highly recommended to not enter a personal card to pay for travel expenses. Out-of-pocket expenses must be entered manually to your expense reports, and reimbursement for these will be processed only after the conclusion of your trip.

To Add Your Travel Card or (highly discouraged) Personal Card:

1. Click [+ ]Add a Credit Card.

2. Fill out the card information and make applicable selections.

3. Billing: Note, the Billing Address for all Trinity Travel Cards is 1 Trinity Place San Antonio, Texas 78212.

4. Click Save.

You should now have made it to the bottom of the My Profile—Personal Information page. If you have not saved the page throughout, click the blue Save button at the bottom of the screen under the Credit Cards section. Next, you will activate e-receipts in order to automatically receive air, car, and hotel receipts electronically to your Concur Portal.
Activating E-Receipts

Once activated, e-receipts will appear automatically attached to the appropriate Travel Card expenses that feed into your Concur Portal. This means that you will not need to upload receipts manually for those expenses with an e-receipt. In your available expenses, and as you create expense reports, you will see the e-receipt icon - - next to expenses with e-receipts. Click or hover over the icon to view the e-receipt.

1. From the My Profile—Personal Information page, scroll to the top and click Profile from the white menu banner across the top of the screen. Or, from the Concur Home Screen, locate the E-receipt alert, and click Sign up Here.

2. Click E-Receipt Activation

3. The E-Receipt Activation and Use Agreement window appears.

4. Click I Accept

5. A confirmation message appears.

Note: Since you must agree to the Use Agreement, this action cannot be performed by a Travel Arranger/Assistant or a Delegate—The users must do this themselves.
Assigning Delegates

Request and Expense Delegates are shared in the system, meaning that regardless of whether you assign the delegate from the Expense Delegates or Request Delegates page, the delegate will have both the Request and Expense permissions. Delegate permissions are different from those of Travel Arrangers in that they may prepare Travel Requests and prepare Expense Reports on behalf of another user. Travel Arrangers may only book travel and update Travel Profile information. If a user assigns a person as both a Travel Assistant and a Delegate, they will be able to do it all. Just as with Travel Assistants, a Delegate must be a profiled Concur user.

1. From the **Profile Settings** page, click **Expense Delegates** (either from the left-hand vertical menu or from the list of options in the middle of the page).
2. Click the blue **Add** button.
3. Search for your delegate by name, email address, employee ID, or logon ID. Select your Delegate, and click **Add**.
4. Check off the permissions you wish for your delegate to inherit.
5. Click **Save** and you’re finished!

### Expense Delegates

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<th>Delegates</th>
<th>Delegate For</th>
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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

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<th>Can Prepare</th>
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<th>Can Use Reporting</th>
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<th>Can Approve Temporary</th>
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