

## Quick Guide: Profile Setup

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### Guide

This **Guide** will provide you instructions on how to setup your **Profile** in Concur. Upon initial access to Concur, setting up your **Profile** is the first step to take.

### Accessing Concur

1. Go to **Travel.ouhsc.edu**.
2. Login with your HSC credentials.
3. Please note that you will either need to be on campus or going through a secure VPN connection to access Concur.




### Profile

4. Select your **Profile** menu in the upper right corner of your screen and click **Profile Settings**.
5. Click **Personal Information** from the left-side menu.
6. Your **First** and **Last Name** will default from HR but your **Middle Name** may need to be entered or filled in if only the initial is listed. If you do not have a middle name, click the **No Middle Name** box below **Middle Name**. Your name should reflect your photo ID used for TSA travel.
7. You can enter a **Nickname** that will display after your HR name, if desired.
8. Your **Work Location** and **Home Location** should also populate from HR information. If these need to be adjusted, please make the change in Self-Service.
9. **Contact Information** should be entered. This is the information that the contracted travel agency will use to contact you in the event of a travel disruption. Please note that only a **Work Phone** **or** a **Home Phone** is required, although both **Work Phone** and **Home Phone** appear to be required fields.
10. The **Email Addresses** section will display any email accounts that are available to be verified or have already been verified with Concur. To verify your email address, click the **Verify** hyperlink. A pop-up will appear notifying you that a verification email has been sent to the account listed. You should soon receive an email from Concur with a Verification Code. **Copy the code** and paste it in the **Enter Code** box. Click **OK**. A pop-up will appear notifying you that the email address has been verified and that you can

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now send receipts directly to Concur by emailing them to [Receipts@Concur.com](mailto:Receipts@Concur.com) and trip information by emailing details to [Plans@Concur.com](mailto:Plans@Concur.com).

11. The **Emergency Contact** section should be completed. This the information that the contracted travel agency will use to contact you in the event of a travel emergency. Please note that the system will only accept letters when entering in a name. Do not enter in dashes, quotation marks, slashes, etc. as this may cause your profile to generate errors when using the travel section of Concur.
12. The **Travel Preferences** section can be completed or left blank. Entering in the **Preferred Departure Airport** will reduce the time required to search for flights.
13. **Frequent Traveler Program** information can be entered, noting that the State Travel Reimbursement Act 74 O.S. § 500-15 says “no travel claim shall be awarded if the filer of the claim has benefited from the personal receipt of frequent travel miles unless those miles are used to offset future claims against the state.” Click on **+ Add a Program** and a pop-up menu will appear. Select the **program type** by clicking on the Airplane, Rail or Car icons   , select the **company name** from the dropdown list and then enter in the appropriate **program number**. Click **Save** when complete.
14. The paragraph below the **Frequent Traveler Program** section allows you to connect reward programs. If you have entered in rewards information, click either **I Agree** or **No Thanks**.
15. The **Advance Programs** section can be completed if you have an Amtrack program number. Click on **+ Add a Program** and a pop-up menu will appear. Use the first dropdown menu to select **Amtrack** and use the second dropdown menu to select the **program**. Enter in the **Advance Program Number** and **Expiration Date**. Click **Save** when complete.
16. In the **TSA Secure Flight** section, your **Gender** and **Date of Birth** have automatically been entered from HR records. Please contact HR if this information is incorrect. If you have a **TSA Precheck Number**, that information can be entered in this section.
17. The **International Travel** information section can be completed if you have a **Passport** or **Visa**.
  - a. For a **Passport**, click the **+ Add a Passport** link. Enter in your **Passport Nationality, Passport Number, Date Issued** and **Place Issued (City, State)**. When entering **Place Issued (City, State)**, enter **USA** or the country of authority

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listed on your passport. Enter in your **Country Issued** and **Passport Expiration** date. Click **Save** when complete.

- b. For a **Visa**, click the **+ Add a Visa** link. Enter in your **Visa Nationality**, **Visa Type**, **Visa Number** and **Visa Expiration** date. Click **Save** when complete.

18. The **Credit Cards** section information is where your **Travel Card number**, **Personal Card number** or both can be listed. Please note that a credit card is required to complete an online booking but is not required otherwise. Click on **+ Add a Credit Card** to enter card information and a pop-up menu will appear. Please note that when entering in your **card information**, you can choose to give a card a **Display Name**. If you are entering in both a **Travel** and **Personal** card, please make sure that the **Display Name** for each card identifies the cards easily. If entering your **Travel Card number**, please make sure that the **billing address** listed is the address used on the **Travel Card application**, not your home address, which is the billing address that will automatically populate. If you included a building name/room number on your **Travel Card application**, first enter in the **street address**, click **Enter** and then enter in the **building name/room number** on the second line.
19. Once all required information has been entered in the **Personal Information** section, click on any of the **Save** buttons on the screen.
20. Next, click on **Expense Information** from the left-side menu.
21. Enter in your **Personal License Plate Number**. This information is required for any **Mileage** expenses and will automatically populate for those expenses once entered in your **Profile**.
22. If you have a **default chart field spread**, enter this information in the Fund, Org, Project, Program and Subclass sections. Please note that this information can also be entered or changed on an expense report. If you are unaware of what information to put in this section, please consult with someone in your area that handles financial duties. When entering the Fund, Org and Project, you will select from options in the drop down menu. When selecting Program and Subclass, you will need to enter in the full code, wait for the correct code to appear below the list and then select it.
23. Next, click on **Expense Delegates** from the left-side menu.
24. Delegates are employees who are allowed to perform Concur tasks on behalf of other employees. If you have an individual that you want to assign as a Delegate, click **Add**.

25. Search for the individual by name and when the correct individual appears, click **Add**.
26. Select the appropriate **access boxes** based on what you want the individual to be able to assist with.
- a. **Can Prepare.** This option allows a Delegate to prepare an expense report on your behalf.
  - b. **Can Book Travel.** This option allows a Delegate to book travel on your behalf. The Delegate can arrange travel on your behalf and have the expenses charged to a credit card in your profile.
  - c. **Can Submit Reports.** This option allows a Delegate to check for any errors on an expense report. It does not allow them to submit the report on behalf of a claimant. All claimants must submit their own reports.
  - d. **Can Submit Request.** This option allows a Delegate to submit a Request on your behalf. Requests are required for any Out of State or International expense reports.
  - e. **Can View Receipts.** This option allows a Delegate to view any Receipts that have been uploaded to your Available Receipts through the Concur Mobile app.
  - f. **Can Use Reporting.** This option allows a Delegate to view any reports that you have access to.
  - g. **Receives Emails.** This option allows a Delegate to receive emails associated with your expenses. These could be request approvals, pending Travel Card transactions, expiring notifications, etc.
  - h. **Can Approve.** This option is only available for Delegates who are either approvers in the TAL system or Cost Transfer module. If you grant a Delegate access to approve, they will gain the ability to approve all requests/expenses that you have access to. This option overrides all other financial system restrictions.
  - i. **Can Approve Temporary.** This option is available for a Delegate to have access to approve on a temporary basis. Use the calendar options to select a temporary approval date range.
  - j. **Can Preview for Approver.** This option is available for a Delegate to preview report/request in the approver's approval queue. The Delegate cannot approve the expense report but rather ensures that the expense report is ready for approval.

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Please note that a Delegate who is given the Preview option is not allowed to approve.

- k. **Receives Approval Emails.** This option is available for a Delegate to receive the same approval notification emails as an approver.
- 27. Once the appropriate selections have been made, click **Save**.
- 28. If a Delegate ever needs to be deleted from your **Profile**, select the box to the left of their name and click the **Delete** button.
- 29. Next, select **E-Receipt Activation** on the left-side menu.
- 30. This section will allow you to active **E-Receipts** which are electronic receipts automatically imported into Concur by some merchants that will substitute for an actual receipt.
- 31. Click on the **E-Receipts** hyperlink and then **I Accept** to activate this function.
- 32. Next, select **Concur Mobile Registration** on the left-side menu.
- 33. This section will allow you to create a PIN which will be used if you want to download the **Concur Mobile** app.
- 34. Review your email address, which should be your FirstName-LastName@ouhsc.edu.
- 35. Click the hyperlink that says **create a Concur Mobile PIN**.
- 36. Type in a **PIN** that is at least 4 characters. The **PIN** can consist of letters, number or special characters.
- 37. Click **Set PIN**.

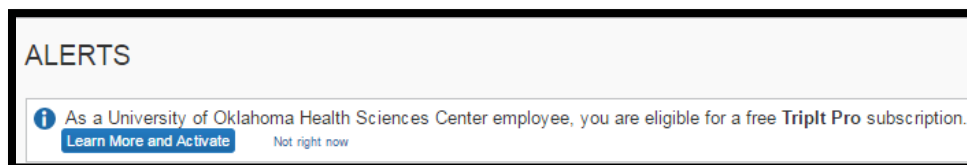
### Apps

- 38. Concur is linked with several different companies that provide **Apps** for travel related services like Uber, Lyft, Airbnb, etc. The two most popular Apps available through Concur are **Concur Mobile** and **TripIt**.
- 39. Each mobile device will have specific download instructions but the basic steps to utilize the most popular **Apps** are listed below.
  - a. **Concur Mobile.** This is the mobile version of Concur. This **App** will allow you to take pictures of receipts and automatically upload them to Concur. This **App** also incorporates Optical Character Recognition technology to read receipt details like vendor name, dates and amounts so that those details do not have to be entered manually. This **App** is also useful for Approvers to keep up with their approval

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tasks. Download **Concur Mobile** and when asked to enter in your **Work Email** or **Username**, enter in your **HSC email address**. Click **Next**. When prompted to enter in your password, enter in your **PIN** and then click **Sign in to Concur**.

- b. **TripIt**. This **App** will act as your personal travel assistant by organizing your travel plans, updating you on flight alerts and allow you to share your plans with others. Download the **free** version of **TripIt**. When registering, use your **HSC email address** and create any **password**. Once the free version is downloaded, go to **Travel.ouhsc.edu** and login with your HSC credentials. At the top of the **Alerts** section, you will see a notification about activating the **TripIt** Pro subscription. Click **Learn More and Activate**. In the pop-up screen, enter in your **HSC email address** and the **password** that you created for **TripIt**. Click **Sign Up**. **TripIt** will send a verification email to your HSC email account. **Open** the email, **verify** your account by clicking on the link in the email and you will be upgraded to the Pro version of the **App**.



i.

A screenshot of a web form titled "ACTIVATE YOUR TRIPIT PRO SUBSCRIPTION". Below the title is a subtitle: "You now have TripIt Pro to help you manage all your trip details." The form is divided into two main sections. The left section features the Concur and TripIt logos with a double-headed arrow between them. Below the logos, it says "One Place for All Your Travel Plans" and "Organize trip details into one master itinerary — even if your arrangements are booked on multiple websites." Further down, it says "Get Notifications on the Go" and "Easily get your flight status and refund alerts." The right section is titled "Activate your subscription." and contains two input fields: "Email Address" (with the placeholder "Email-Address1@ouhsc.edu") and "Password" (with a masked password "\*\*\*\*\*"). Below the password field is a link: "Password help: It is best not to use your network or corporate password." At the bottom of the right section is a "Sign Up" button.

ii.

40. For more information on other **Apps** connected with Concur, click the **App Center** from the main menu.