

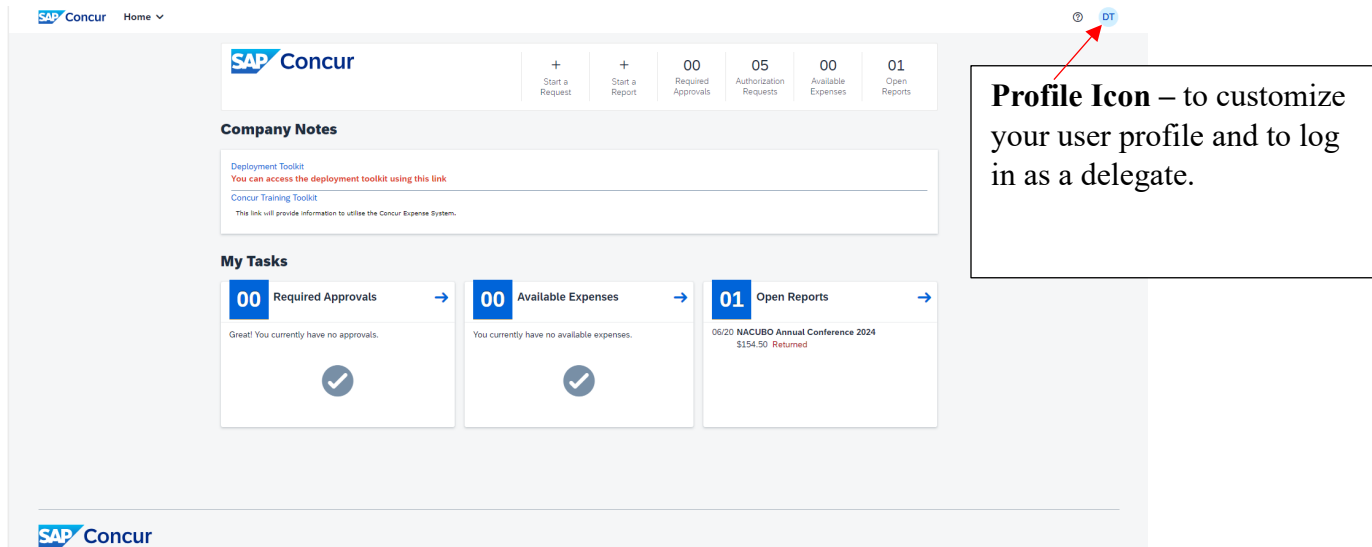
SAP Concur Profile Setup

You may change your profile settings at any time. Once you have made your changes and saved your changes, they are effective immediately.

Expense Profile

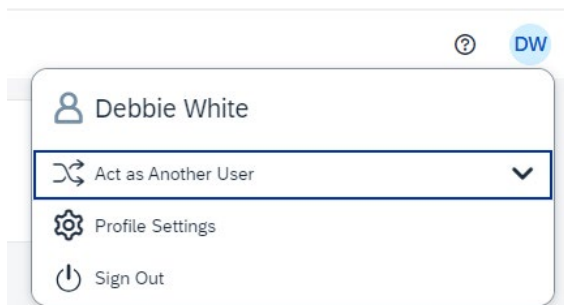
Users may set up or change personal preferences. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information, etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information changes. The profile options include:

- Approvers
- Attendees
- Bank Information
- E-Receipts
- Expense Delegates
- Expense Preferences:
 - Email notifications
 - Prompts



The screenshot shows the SAP Concur home page. In the top right corner, there is a profile icon with the initials 'DW' and a small 'DT' label. A red arrow points from a text box to this icon. The text box contains the following text:

Profile Icon – to customize your user profile and to log in as a delegate.



The screenshot shows the user profile dropdown menu. The user's name is 'Debbie White'. The menu options are:

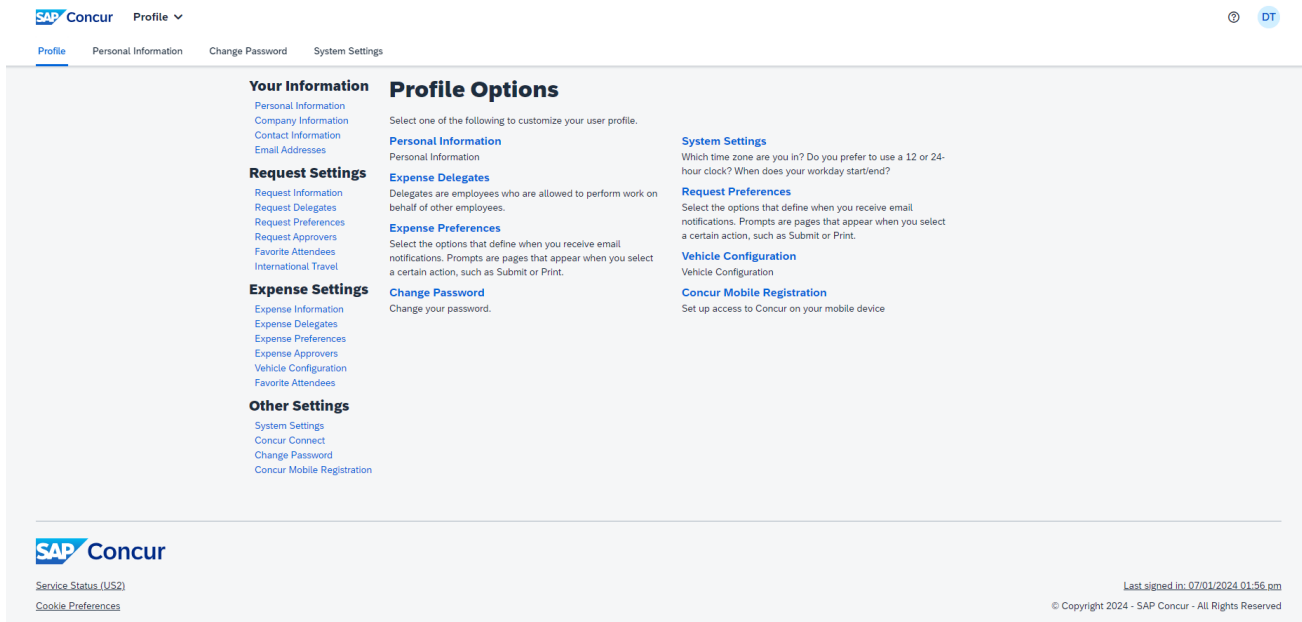
- Act as Another User
- Profile Settings
- Sign Out

Act as Another User – Allows you to log in as a delegate for someone else.

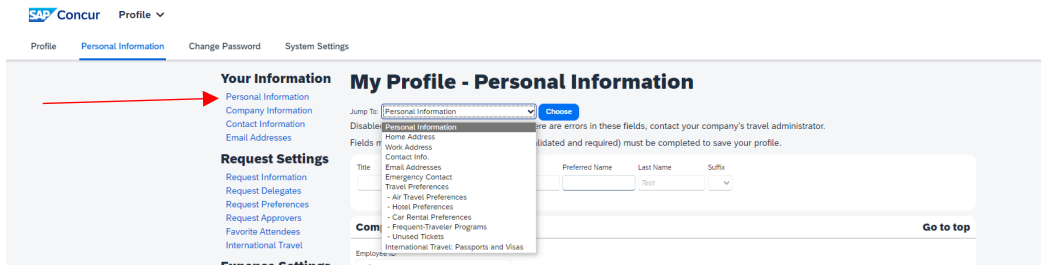
Profile Settings – Click on this option to see the screen below.

Sign Out – To log out of the SAP Concur system.

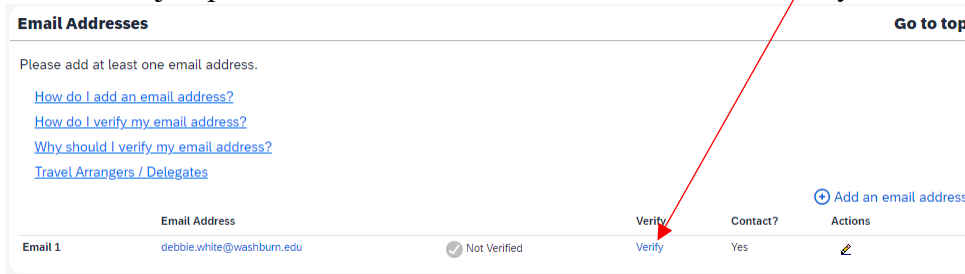
Below is the screen you will see once you select **Profile Settings**.



Click on **Personal Information** to confirm and/or update your work address, home address, contact information, email address, emergency contact information, etc. You may scroll down on the screen OR you may use the drop down arrow by “Jump To” a specific area. Select the area you would like to jump to and click Choose.



To receive the System email messages you will need to verify your email when you begin using the system. Scroll to or jump to “Email Addresses”. Click on the blue “Verify” under the Verify heading.



You will receive the following message.

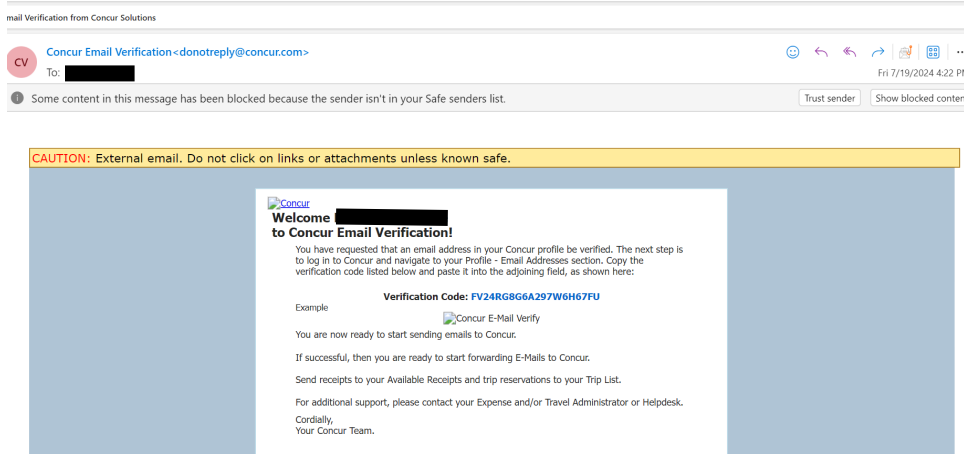
Verification Email Sent



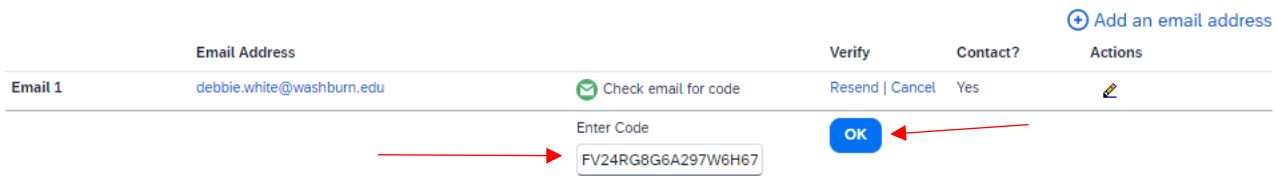
An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.



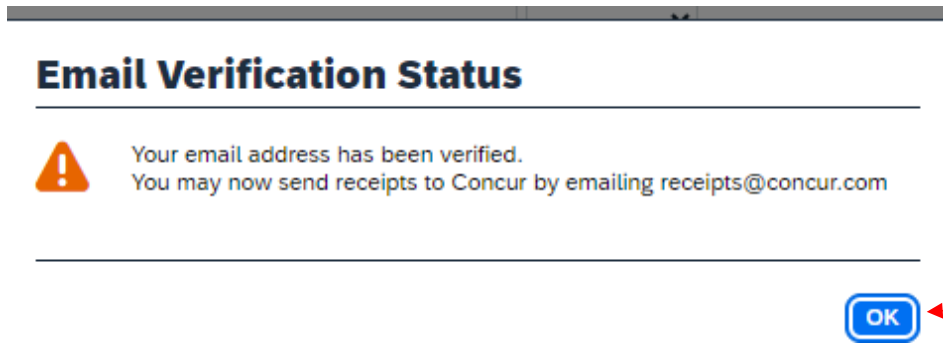
Click OK and go to your email to find the message and code. Below is an example of the message you will receive.



Copy the code and paste Or manually enter the code into the Enter Code Box shown below. Click OK.



You should receive the following message.

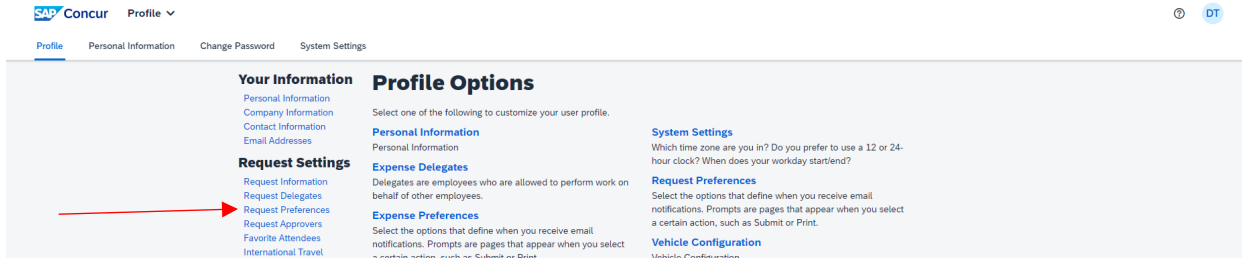


Click OK. Now you will see your email address is showing as Verified.

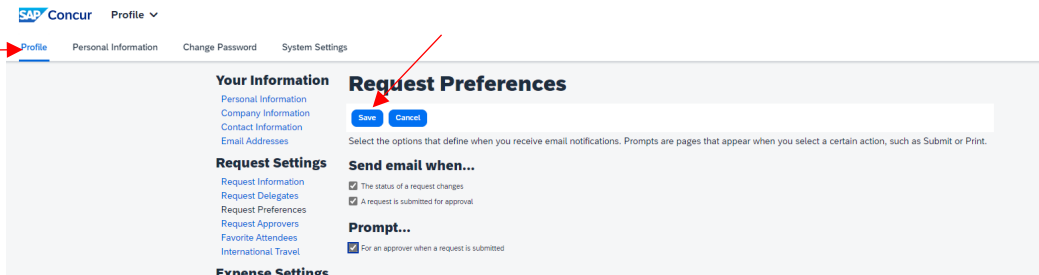


REQUEST PROFILE SETTINGS

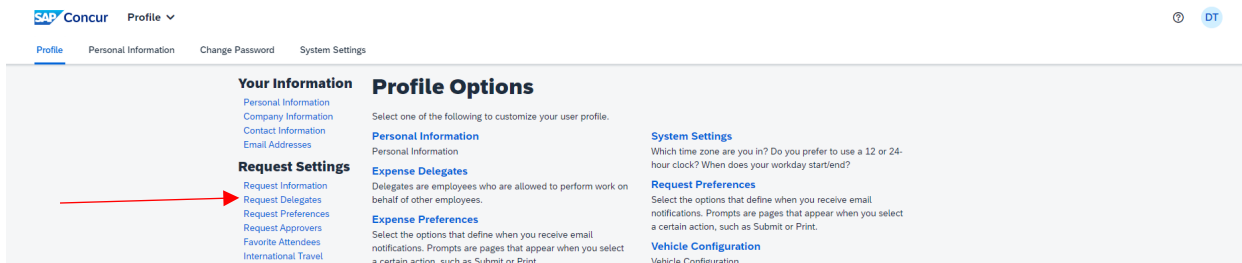
Click on **Request Preference** to define when you want to receive email notifications about your Requests (travel authorizations).



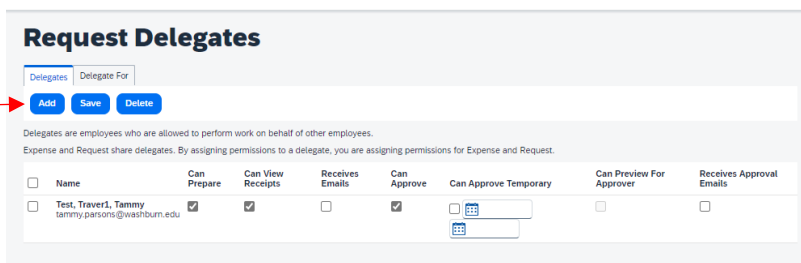
Select or deselect the types of email messages you would like to receive for Requests. Click on Save. Click on Profile at any time when you are in the Profile settings to go back to the main Profile screen.



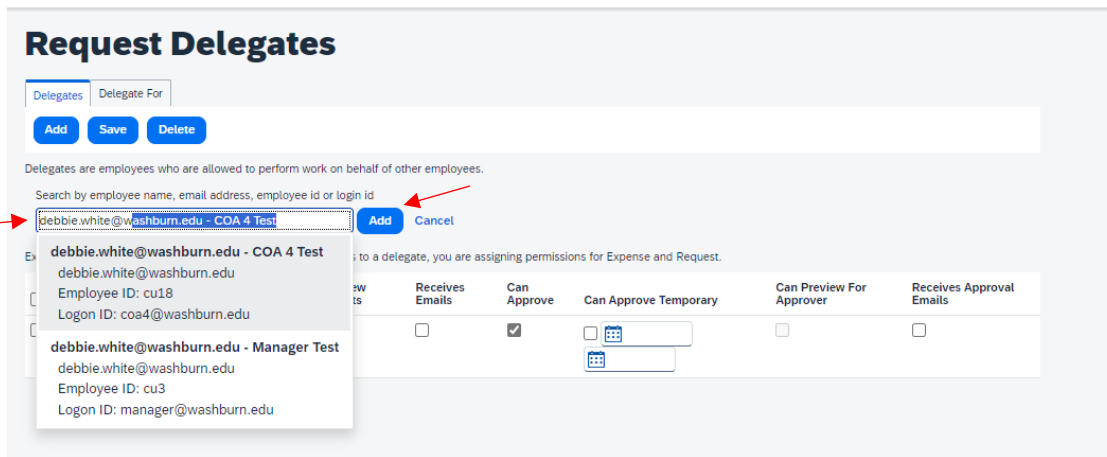
Click on **Request Delegates** to assign others to work on your Requests (travel authorizations). Expense and Request share delegates. By assigning permission to a delegate, you are assigning permission for Expense and Request.



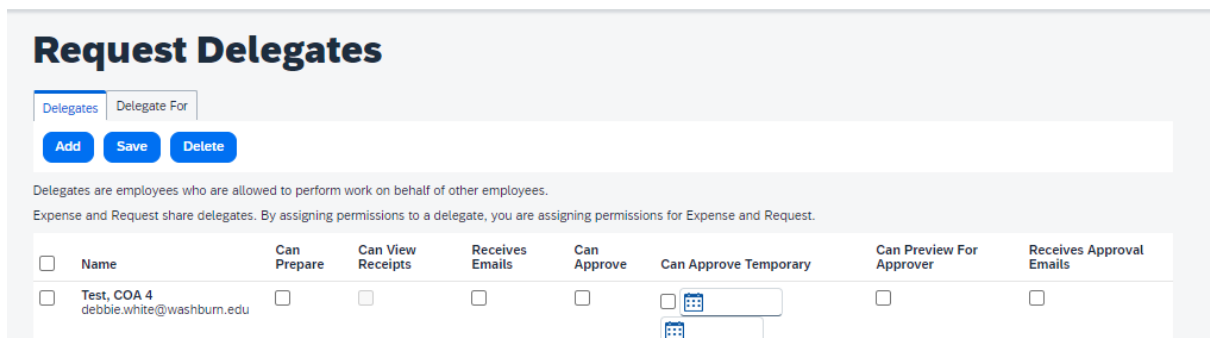
The screen will open on the Delegates tab. Click Add and a search box will appear for you to search for the individual you would like to add as your delegate. Anyone you have already designated as a delegate will appear on the screen as well.



As you type the name, email address, or employee id a listing of matches will appear. Highlight and click on the name you would like to assign as your delegate. Click on Add.



Check the boxes for the permissions you would like to provide to the delegate.



Can Prepare – allows delegate to prepare a travel request or expense report on your behalf.

Can View Receipts – allows delegate to see receipts you have loaded into Concur.

Receives Emails – allows delegate to receive Request and Expense emails from Concur on your behalf.

Not every user will have Approval duties assigned to them. Only those with approval responsibilities will have the ability to delegate these to another.

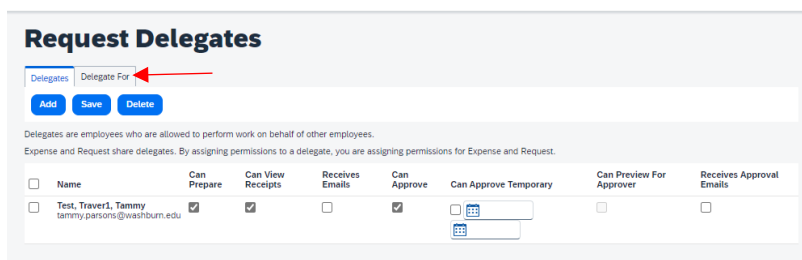
Can Approve – allows the delegate to approve on your behalf.

Can Approve Temporary – allows delegate to only approve during a specified period of time on your behalf.

Can Preview for Approver – allows delegate to preview approvals on your behalf.

Receives Approval Emails – allows delegate to receive approval emails on your behalf.

This screen is also where you can see the list of employees you may act as a Delegate, click on Delegate For.



In the screen below, you will see this employee is not assigned as a Delegate.

Request Delegates

Delegates Delegate For

Delete

This employee may act as a delegate for the listed 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 View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
No records found.								

EXPENSE PROFILE SETTINGS

Click on **Expense Preference** to define when you want to receive email notifications about your Expense reports (cash advances, p-card transactions, travel reimbursement).

SAP Concur Profile

Profile Personal Information Change Password System Settings

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

Personal Information

Personal Information

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.

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?

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.

Vehicle Configuration

Vehicle Configuration

Concur Mobile Registration

Set up access to Concur on your mobile device

Select or deselect the types of email messages you would like to receive for Expenses. Click on Save.

Expense Preferences

Save Cancel

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.

Send email when...

- The status of a cash advance changes
- A cash advance is submitted for approval
- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval
- A card feed import completes

Prompt...

- For an approver when an expense report is submitted

Sign me up for...

- Use Expenselt to create expenses from uploaded receipts on the web
- Use Expenselt to create expenses from receipts emailed to receipts@concur.com

DELEGATES:

Travel Arrangers and Delegates can initiate the verification process on behalf of a user. The user will receive the verification code. Travel Arrangers and Delegates should verify their email address in their own profile.

1. The Expense Delegate should verify email address in own profile
2. The Expense User should verify email address in own profile
3. The Expense Delegate should be listed in the User's list of Expense Delegates

Once these steps are complete, the Delegate can simply send the email to receipts@concur.com, and include the user's verified email address in the Subject line of the email. This will ensure that the receipt is associated to the correct user.

CHANGE PASSWORD

Since the University will use Single Sign On (SSO), do not use this link.