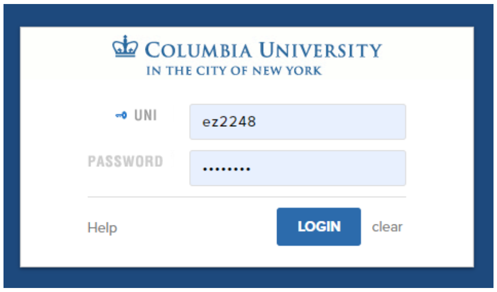
Your Concur Profile stores personal information used for creating expense reports and booking travel. Upon your initial log in to Concur, you should verify and update your Profile. You can update your personal information, departmental information, default ChartFields, and email addresses. In addition, setup travel preferences for air, hotel, or car rental, TSA information, and credit cards. You can name Delegates to prepare Requests and Expense Reports or book travel on your behalf.

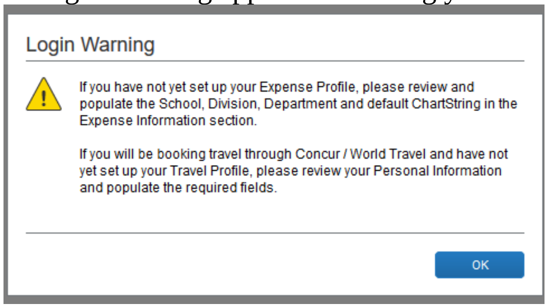
Table of Contents

Logging in to Concur and Accessing Your Profile Settings

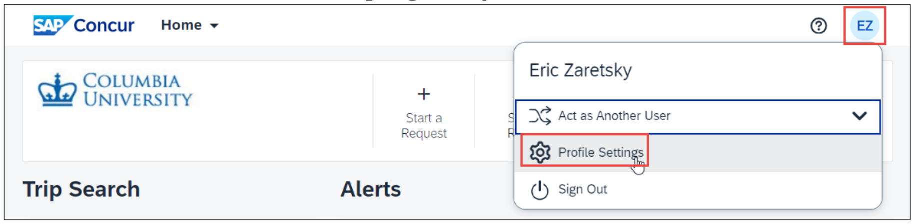
1. Access Concur from the Columbia Travel and Expense Portal.



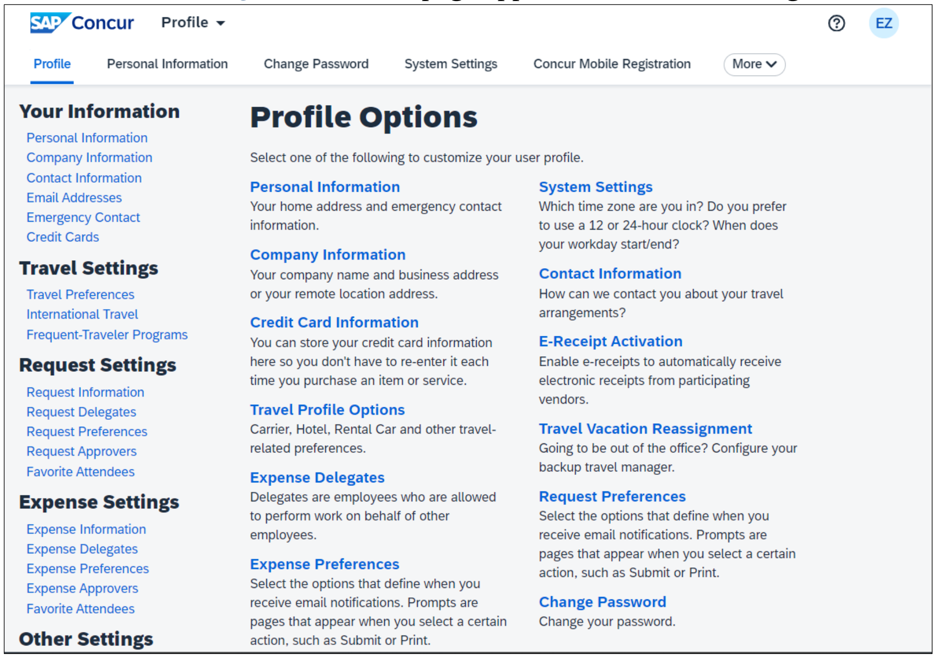
A Login Warning appears reminding you to review and update your Profile settings.



2. Enter your **UNI** and **Password** and click **Login**. Your Concur dashboard appears.
3. Click the **Profile** icon on the top right of your screen.

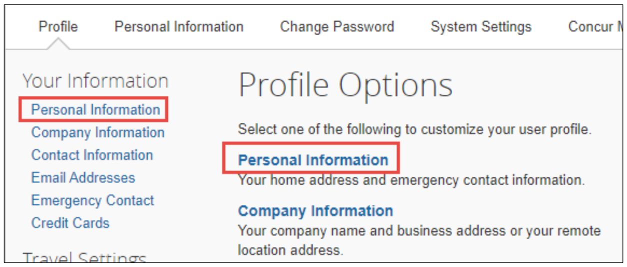


4. Click **Profile Settings**. The Profile page appears with links to navigate to Profile Settings.



Updating Required Information

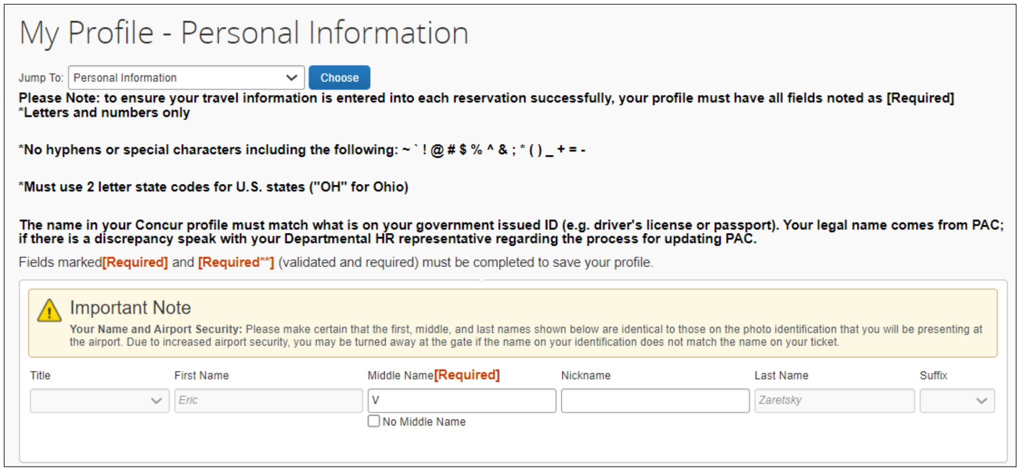
You will find the most common profile tasks on the **Profile Options** page. You can also use the menus on the left to select a setting to update. The first time you update your Concur Profile, you must ensure the following required pieces of information are complete: Your **Name** (including Middle and Suffix), **Company Information**, **Home Address Contact Information**, **Emergency Contact** and **TSA Secure Flight**. You cannot click Save until all required fields are complete.



Click the **Personal Information** link from the left menu or the Profile Options. The Your Information page appears. You can scroll to sections for Company Information, Home Address, Email Address, Contact Information, Emergency Contact and TSA Secure Flight on this page. These are intermingled with Travel Preferences and other optional sections. After making updates, you can click **Save** anywhere on the page.

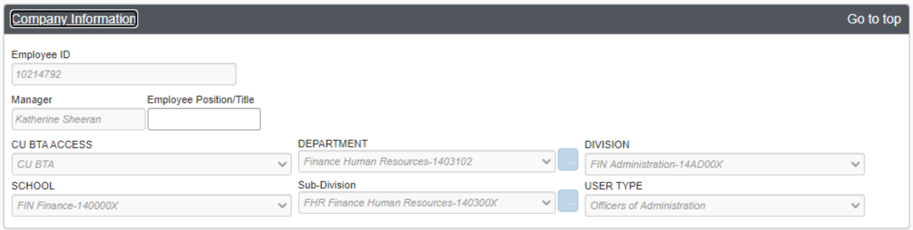
Confirming Your Name

Your name appears as it would in the PAC system. Be sure that it matches with how your name appears on your travel documents such as your driver's license or passport. If there is a discrepancy, speak with your Departmental HR representative regarding the process for updating PAC.



Middle Name is a required field. Be careful to enter your middle name, an initial, or select **No Middle Name** to match how it appears on your travel document. If you need to change it after entering and saving for the first time, you must contact the Finance Service Center.

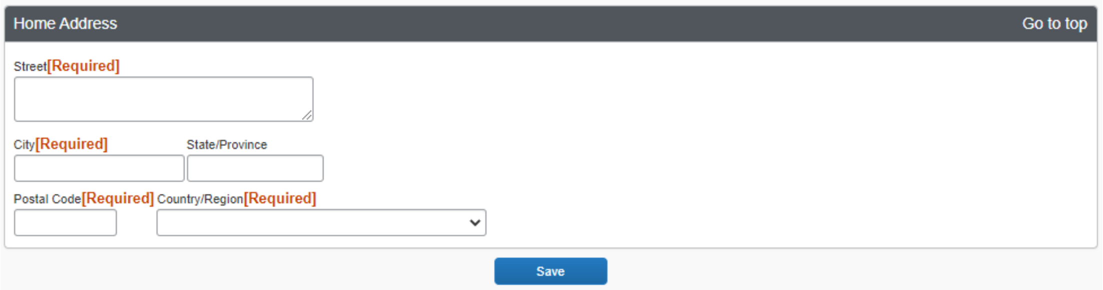
Confirming Company Information



Your **Company Information** will automatically be populated. The name of your **Manager** will appear if they are in PAC. If there is a discrepancy, speak with your Departmental HR representative.

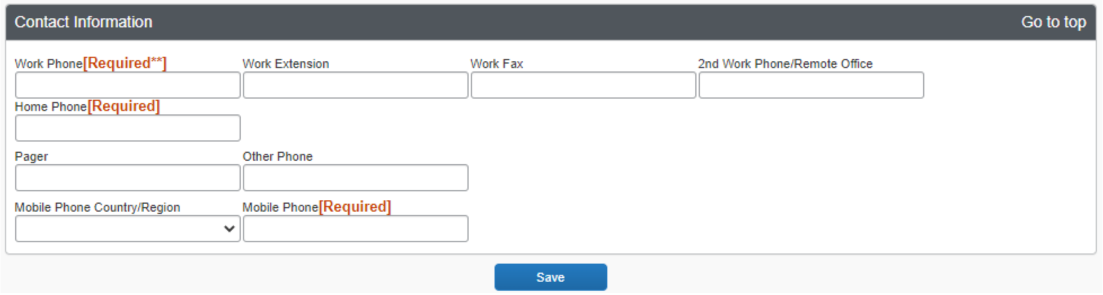
Home Address

Scroll down to the section for **Home Address**.



1. Complete the **Street**, **City**, and **Postal Code fields**.
2. Select the **Country/Region** from the dropdown menu.

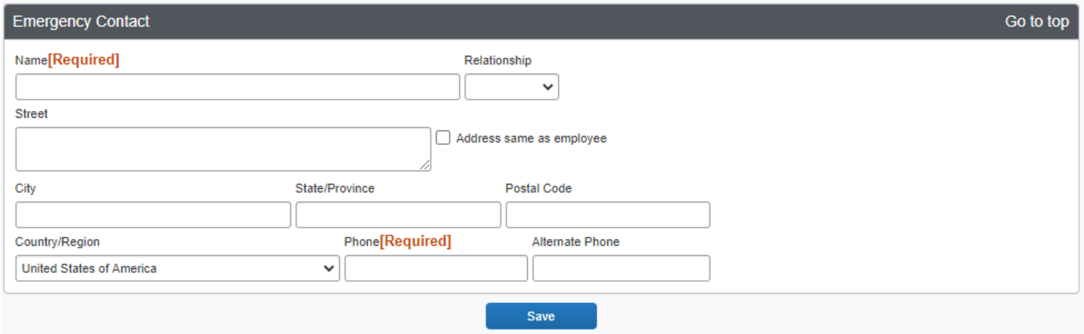
Contact Information



1. Complete the **Work Phone**, **Home Phone**, and **Mobile Phone** fields. Select your **Mobile Phone Country/Region** from the dropdown when entering your mobile phone number.
2. Add any other contact numbers, as desired

Emergency Contact

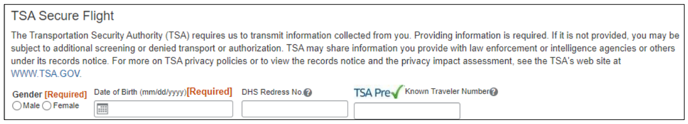
Scroll down to the section for **Emergency Contact**.



1. Enter the **Name** of your Emergency Contact. Optionally, you can enter your Emergency Contact's **Relationship**.
2. You can complete the **Street**, **City**, **Postal Code**, and **Country/Region** fields **OR** you can select the **Address same as employee** if your emergency contact lives at the same address as you.
3. Complete the required **Phone** field.

TSA Secure Flight

Scroll down to the section for **TSA Secure Flight**.



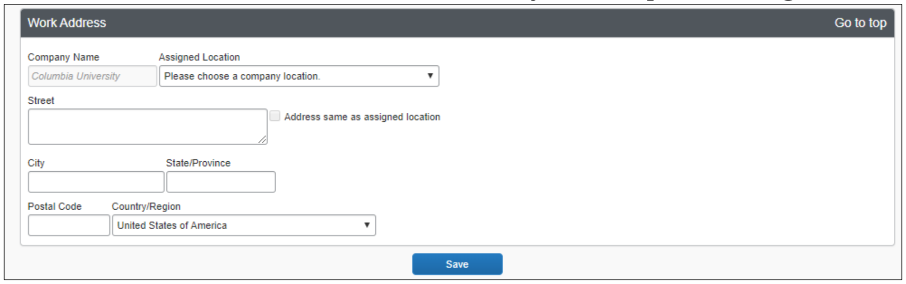
1. Select the option for **Gender**.
2. Enter your **Date of Birth**.
3. Optionally, you can enter a **DHS Redress No** (to help eliminate watch list misidentification) and/or your **TSA Pre** number for expedited security screening.

After you have completed all required fields, click **Save** anywhere on the page.

Other Information

Work Address

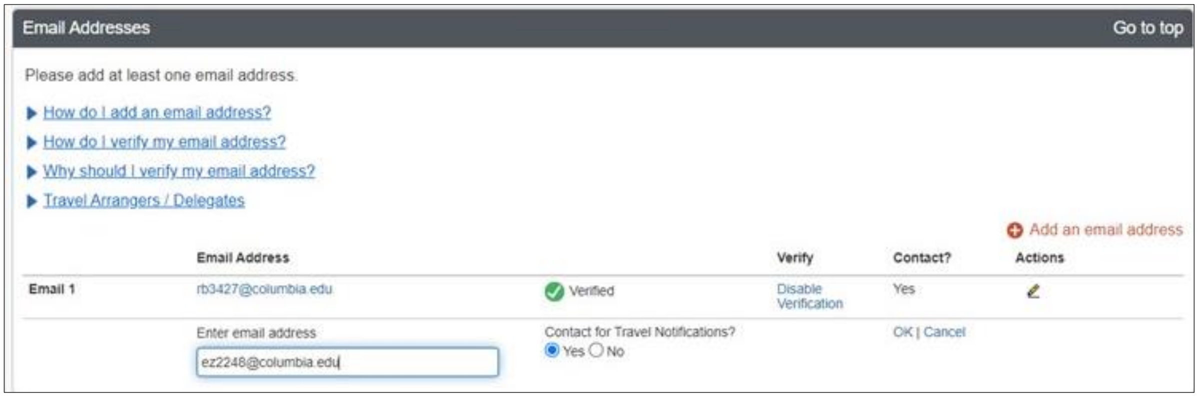
The **Work Address** section is optional but recommended to make updating other Profile Settings, such as Credit Cards, easier. In addition, it is also recommended if you anticipate needing to be reimbursed for Personal Car Mileage.



Email Addresses

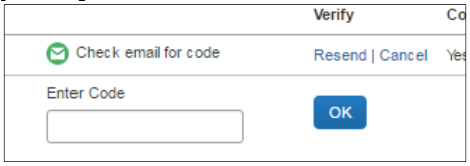
You can email expense receipt attachments to receipts@concur.com, making them available to import into your Expense Reports. You must list any email address, including personal addresses, that you will use for this purpose into this section so that it is recognized by Concur. This would include the email of Expense Delegates who prepare Expense Reports on your behalf (see the section on Delegates). If you want your Travel Delegates to receive invoices and itineraries for travel booked through Concur, you can also add their email addresses here. Refer to the FAQ in the section for more details.

If you have multiple Columbia email addresses, such as *firtname.lastname@columbia.edu, uni@adcu.columbia.edu*, *uni@cumc.columbia.edu*, etc., it is recommended that you add all variations.



1. Click the **Add an email address** link.
2. Enter the **Email Address**.
3. Select Yes or No for **Contact for Travel Notifications** (select Yes for Travel Delegates to receive invoices and itineraries booked through Concur) and click **OK**.
4. If you are using the email address to send expense receipt attachments to receipts@concur.com, click **Verify**. Do not Verify an email address of a Travel Delegate you are adding for the purpose of receiving travel invoices or itineraries.

A verification email with a Verification Code is sent to the address If you do not see the email in your inbox, check your Spam/Junk folder.

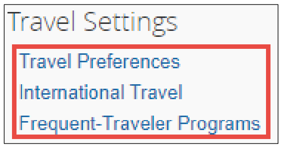


5. Copy the Verification Code from the email and paste into the **Enter Code** field and click **OK**.

Travel Settings

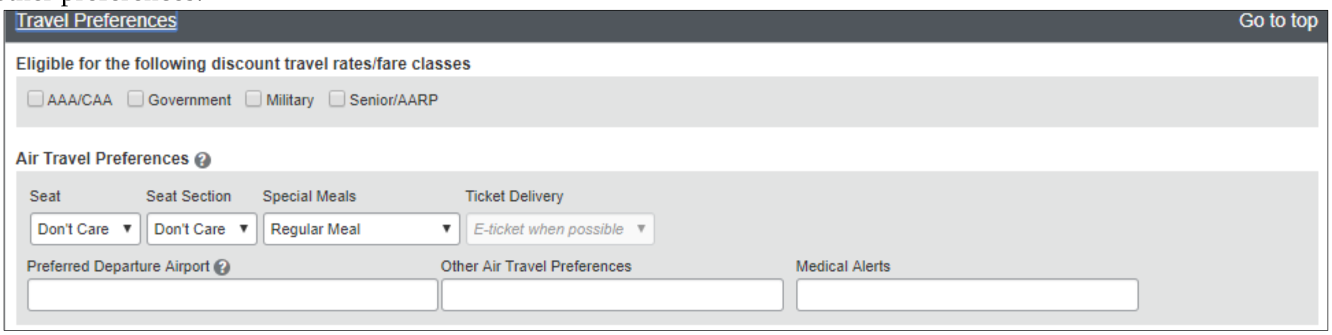
The Travel Settings section allows you to save your preferred travel settings. When booking travel through Concur, your search results will correspond to any saved travel preferences. Add your Frequent Traveler or Advantage Programs to be applied to the associated flights, hotels or car rentals you book. You can also enter your Passport information and International Visas. In additon, you can add your personal credit card or Corporate Credit Card information for making hotel reservations and booking rental cars through Concur Travel.

Note: *You can book Air or Rail tickets in Concur Travel using the* Columbia Air/Rail Central Pay Account *feature without the need to use a credit card.*

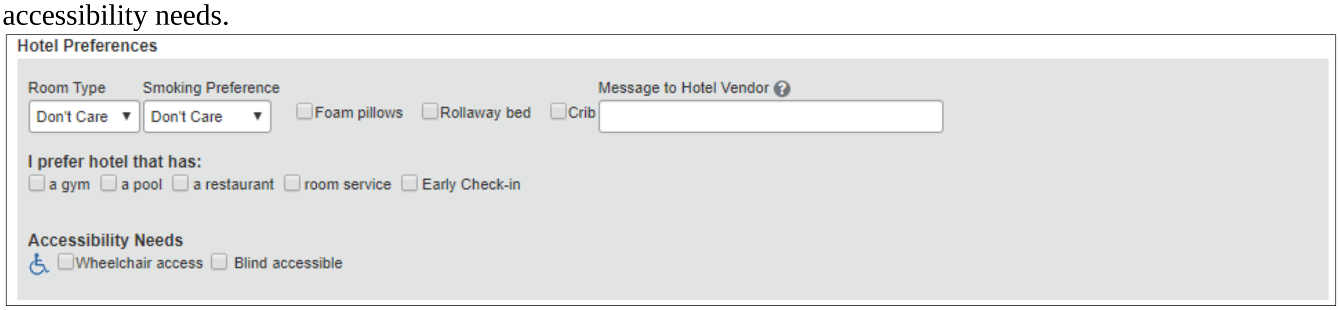


Travel Preferences

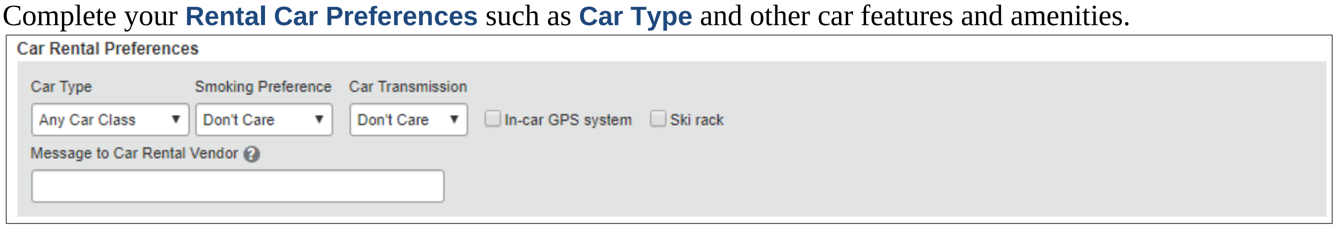
1. Select any **discount travel rates/fare class** for which you are eligible such as Military or Senior/AARP.
2. Complete your **Air Travel Preferences** such as **Seat**, **Special Meals**, and **Preferred Departure Airport**, among other preferences.



2. Complete your **Hotel Preferences** such as **Room Type**, **Smoking Preference** and other hotel amenities and accessibility needs.

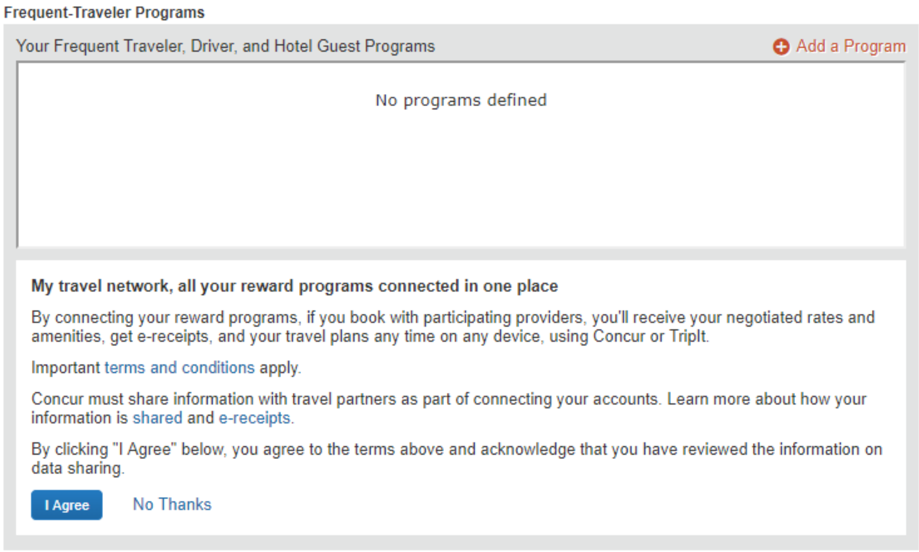


3. Complete your **Rental Car Preferences** such as **Car Type** and other car features and amenities.

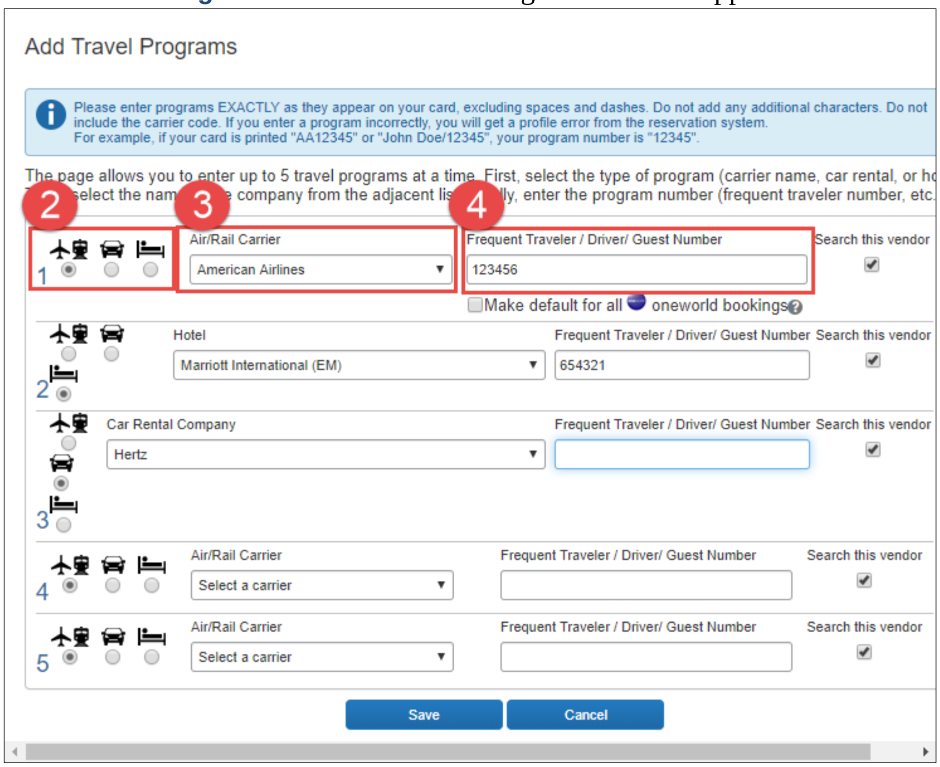


Frequent Traveler Programs

Enter your **Frequent Traveler Programs** for Air/Rail, Hotels or Rental Cars.

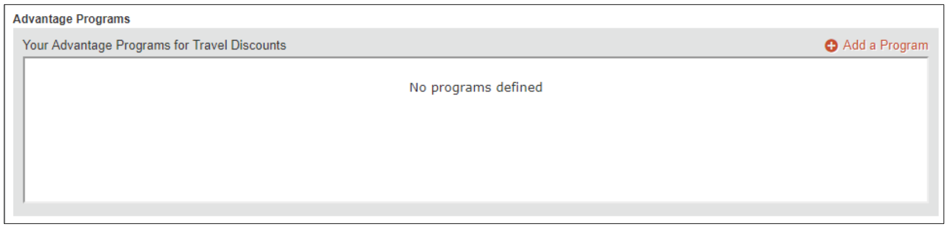


1. Click **Add a Program**. The Add Travel Programs window appears.



2. Select the icon for **Airline**, **Car Rental**, or **Hotel**.
3. Select the **Air/Rail Carrier**, **Hotel**, or **Car Rental Company** based on the icon you selected.
4. Enter the **Frequent Traveler/Driver/Guest Number** *exactly* as it appears on your membership card. Refer to the blue notes section for more information.
5. Repeat steps 2 through 4 for each Frequent Traveler Program you want to add.
6. Click **Save**.
7. Click **I Agree** to the Terms and Conditions

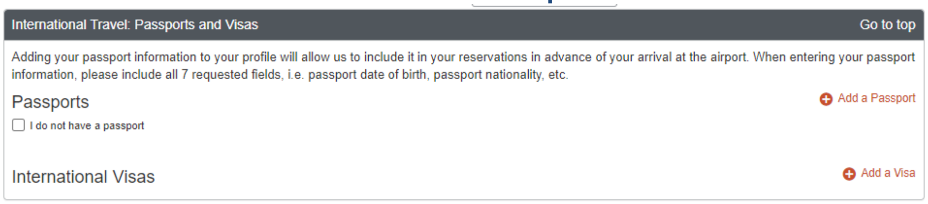
You can also update the **Advantage Programs** section. The Advantage Programs are discounts that are provided by vendors. For example, if you were given a 10% Amtrak discount, you can enter it under the Advantage Programs. You may only see one provider when adding to Advantage Programs because this may be the only provider under Columbia's Travel configuration.



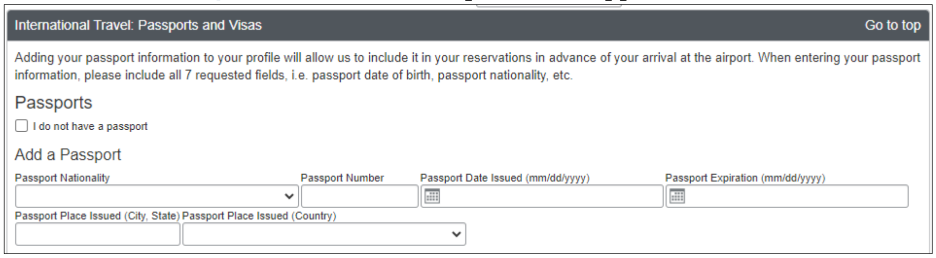
International Travel: Passports and Visas

Add your **Passports and Visas** information to have it included in your travel reservations to make international travel easier. If you add your passport information, make sure to populate all the fields.

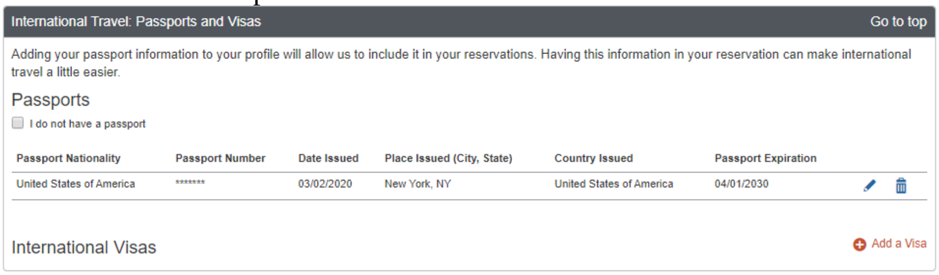
1. Scroll down to the **International Travel: Passport and Visas** section.



2. Click **Add a Passport**. The Add a Passport fields appear.



3. You must enter information for all fields, **Passport Nationality**, **Passport Number**, **Passport Date Issued**, **Passport Expiration**, **Passport Place Issued (City, State)** and **Passport Place Issued (Country)**, in order to receive travel alerts.
4. Click **Save**. The Passport is added.



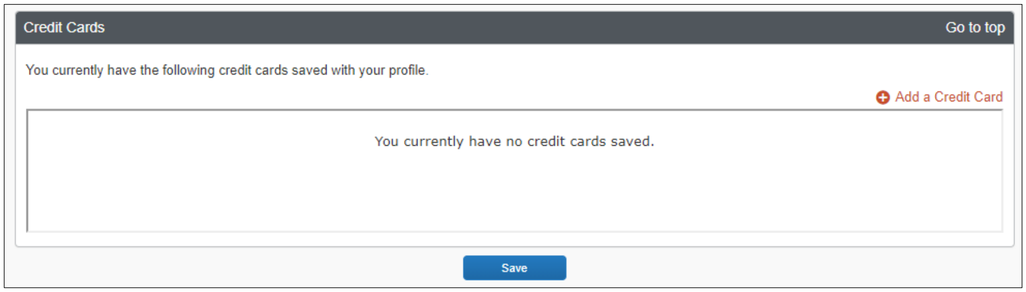
5. If you have any Visas, click **Add a Visa**. The Add a Visa fields appear.

6. Enter the Visa information.
7. Click **Save**. You can add additional Visas, if needed.

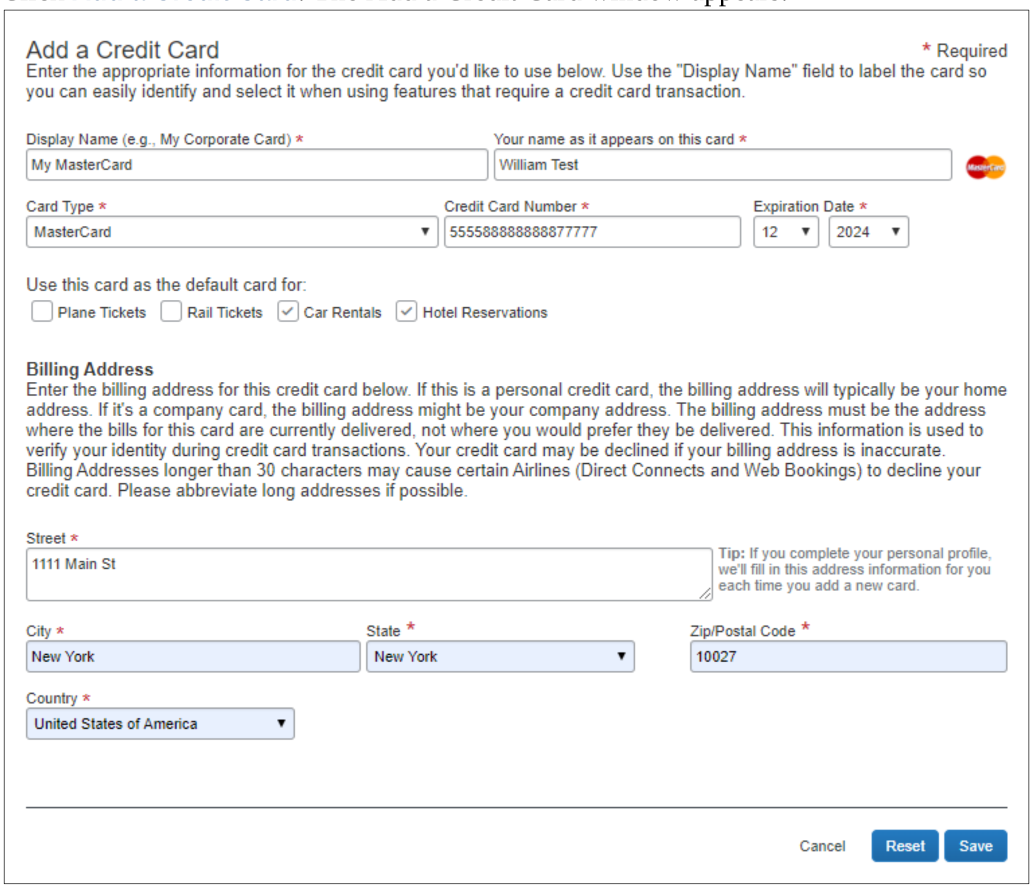
Credit Cards

You can add personal credit cards or, if eligible, your Columbia University Corporate Card as forms of payment when booking travel. You can book Air or Rail tickets in Concur Travel using the *Columbia Air/Rail Central Pay Account* feature without having to use a credit card. In addition, if you decide to indicate a different credit card when making a travel purchase, that card is automatically added to your profile.

1. Scroll down to the **Credit Cards** section.



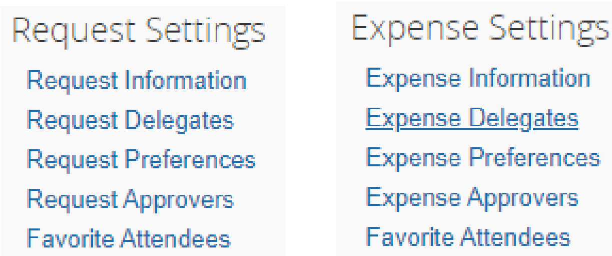
2. Click **Add a Credit Card**. The Add a Credit Card window appears.



3. Enter a **Display Name** for the card you are adding which will appear as an option when booking travel.
4. Enter **Your name as it appears on your card**, select the **Card Type**, **Credit Card Number** and **Expiration Date**.
5. Select the **Use this card as the default for** making purchases for Air, Rail, Car Rentals or Hotel Reservations.
6. If you saved your address in the Personal Information section of your Profile, it appears in the **Billing Address**. Edit or enter a new address as needed.
7. Click **Save.** Repeat steps 2 through 7 to add additional credit cards.

Request and Expense Settings

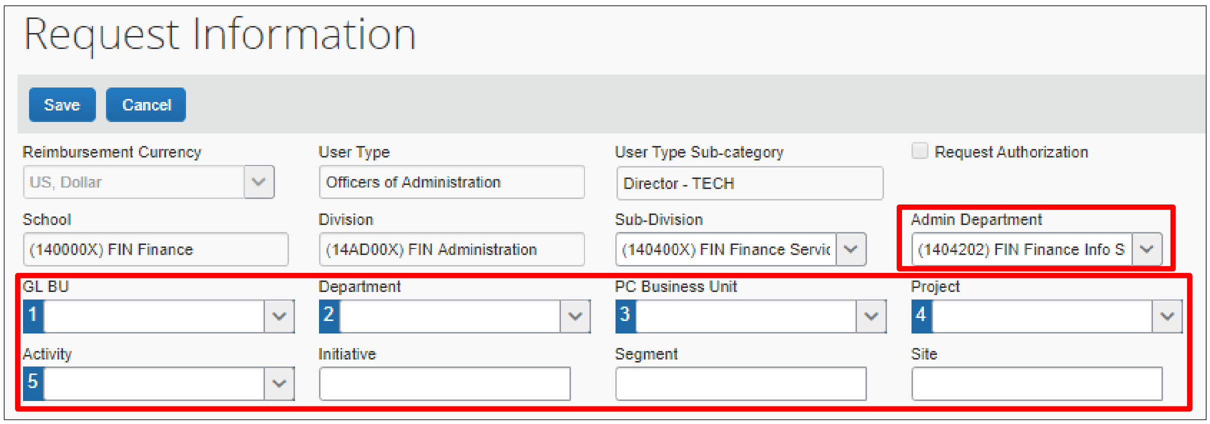
Request and **Expense Settings** allow you to setup preferences and defaults for when you prepare and submit Pre-Trip Requests, Cash Advance Requests or Expense Reports. Settings for Request/Expense Information, Request/Expense Delegates and Favorite Attendees are exactly the same and updating these settings can be accomplished in either place as the information is identical.



Rather than scrolling through a single page, each setting must be selected in order to view and edit.

Request/Expense Information

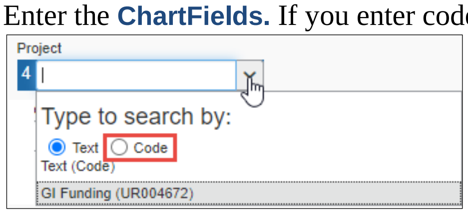
Click **Request Information** or the **Expense Information** link to display the form.



The Request / Expense Information is pre-populated from PAC with your School, Division, Sub-Division and Admin Department. These values will default to new Requests / Report and have an impact on workflow routing. The Division will drive workflow routing to Senior Business Officers when applicable.

The **Admin Department** will drive workflow routing to the Initial Reviewer when applicable. It is possible that your Level 8 Admin Department may not be populated or is incorrect. Ask your School or Department Senior Business Officer for guidance on how to update PAC.

Enter the **ChartFields.** If you enter codes in the ChartFields rather than text, click the field dropdown and select **Code**.



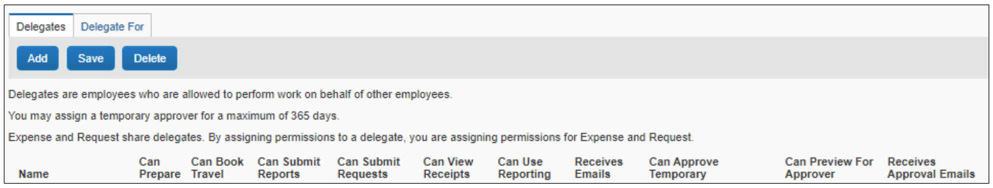
These will also populate as the default in new Requests / Reports. The **Department (2)** ChartField (and Dollar amount) will drive workflow routing to a Financial Approver.

If you leave any ChartFields blank, you will need to complete those ChartFields on your Requests or Expense Reports.

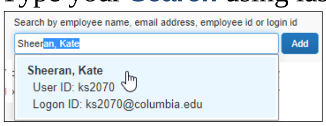
Delegates

You can name colleagues to act on your behalf to prepare Requests, Expense Reports, or book Travel. **Delegates** can create the reports and notify you when complete but they cannot submit expense reports on your behalf. You will receive notifications when the report is ready to review and submit. If you are an Approver, you can name a colleague to approve Requests or Reports on your behalf. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate. Please note that Delegates cannot use the Concur Mobile App when acting on your behalf and must use the Concur Desktop Application.

Click the **Request Delegates** or the **Expense Information** link to display the form.

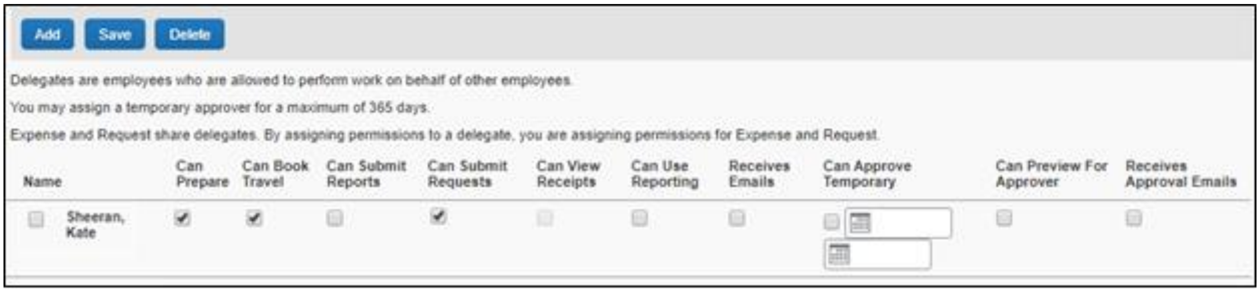


1. Click **Add**.
2. Type your **Search** using last name, UNI, email, etc. A list of matches appears.



3. Select the desired match or click the **Add** button next to the search field if your selection is not added.
4. Select the appropriate **checkboxes** to assign the permissions you wish to give the Delegate:
   - **Can Prepare** -The Delegate may prepare Expense Reports and Requests on your behalf. You will still be required to submit the Report for approval
   - **Can Book Travel** – The Delegate may reserve and book air/rail, hotels or rental cars on your behalf. If you select Can Book Travel, Can Prepare and Can View Receipts will be automatically selected. As a result, a Travel Delegate is also assigned as an Expense Preparer Delegate.
   - **Can Submit Reports** – The Preparer Delegate is able to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate cannot submit the Expense Report into workflow for approval. Two things will happen: 1) your Delegate will see any audit alerts that may prompt them to check for accuracy and completeness; 2) you will receive an email notification that your Delegate has created an Expense Report which should be ready for review and submission. You will need to open the Report created on your behalf and click Submit Report to enter it into workflow for approval.
     If you do not authorize your Delegate to Submit Reports, they will not see the Submit Report button. Instead, the Delegate will see the Ready For Review button once they have finished preparing your Expense Report. When clicked, an email will be sent alerting you that your Expense Report is ready for review and the report status will change to Ready for Review. You must review the Report for accuracy and completeness prior to submitting it into workflow for approval.
   - **Can Submit Requests** – The Preparer Delegate is able to click Submit Request once they have finished preparing your Request. This works the same as Can Submit Reports. See details above.
   - **Can View Receipts** - Defaulted when selecting Can Prepare. This allows the Delegate to view your receipt store, receipts images, etc.
   - **Can Use Reporting** - If you have any reporting rights (typically restricted) you may assign that reporting license to 2 individuals
   - **Receives Emails** – The Delegate receives all the same Concur emails as you
   - **Can Approve** – If you are an Approver, the Delegate may approve Reports and Requests on your behalf. The Delegate must also be setup in Concur as an Approver.

- **Can Approve Temporary** – Indicate the date range you are giving this Delegate to approve reports and requests on your behalf
- **Can Preview for Approver** - The Delegate will be able to review / validate all information that the approver sees, but cannot approve, when they are acting as that Approver
- **Receives Approval Emails** – The Delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

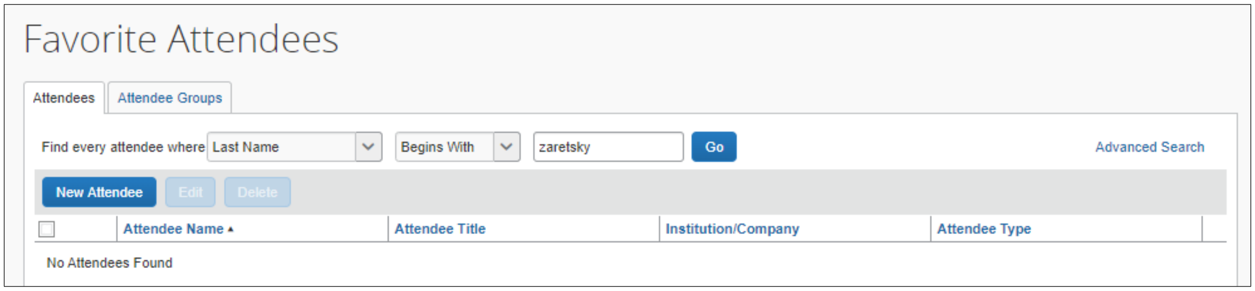


5. Click **Save**.

Favorite Attendees

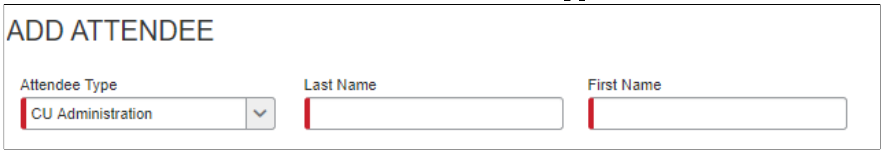
When preparing an Expense Report, the names and details of attendees are required for several Expense Types, such as Business Meals and Entertainment. You can save Favorite Attendees and Attendee Groups if you anticipate creating multiple Reports with the same attendees (i.e., recurring team meetings or events.)

Click the **Favorite Attendees** link to add or edit Attendees.

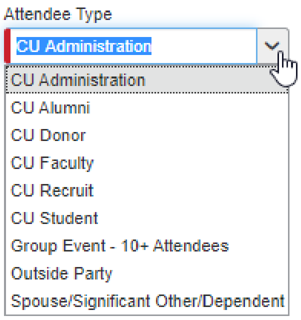


Adding a Favorite Attendee

1. Click **New Attendee**. The Add Attendee form appears.



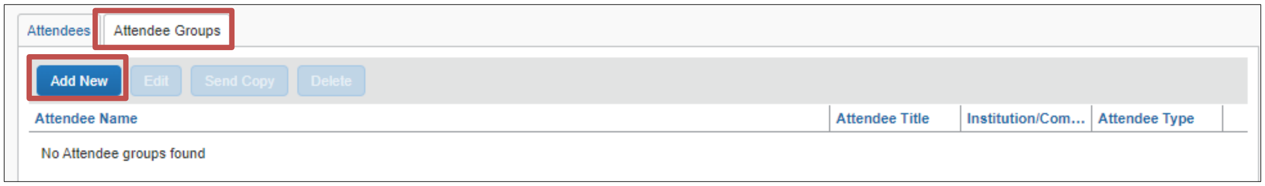
2. Select the **Attendee Type** from the dropdown menu.



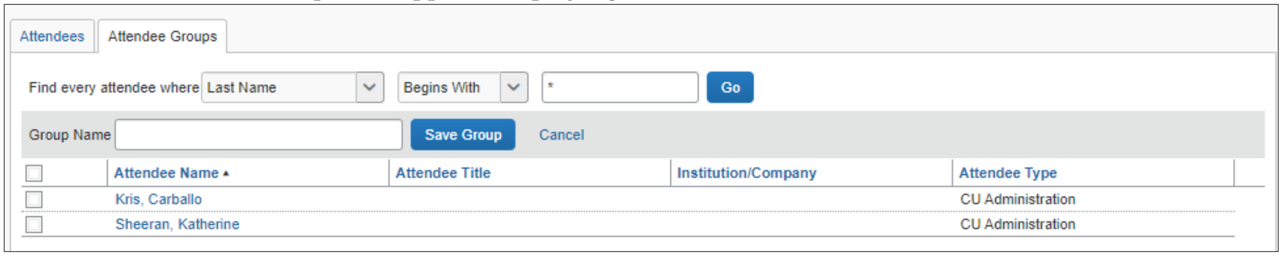
3. Enter the **Last Name** and **First Name**.
4. Click **Save**.

Adding an Attendee Group

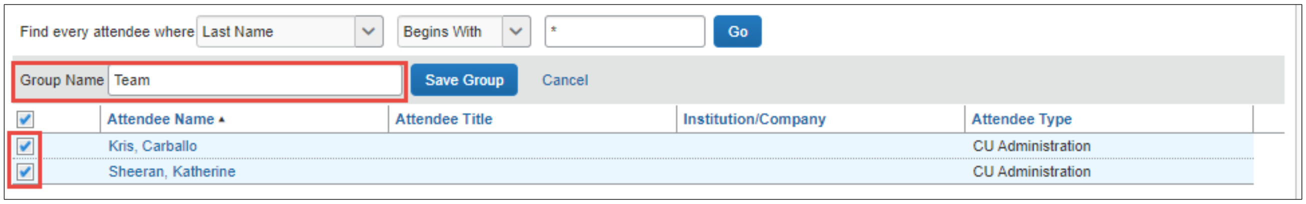
1. Click the **Attendee Groups** tab.



2. Click **Add New**. The Group form appears displaying the Favorite Attendees list.



2. Type the **Group Name** and select the desired **Attendee Names** to be in the group.

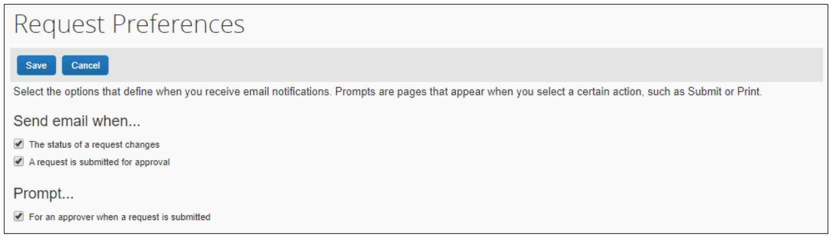


4. Click **Save Group**.

Request Preferences

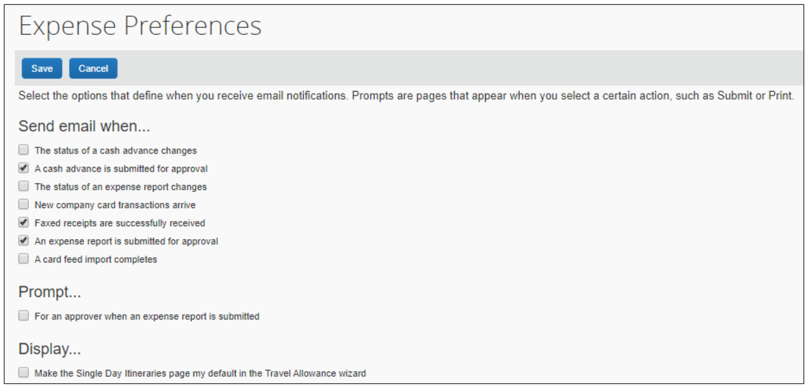
You can turn on or off email alerts and prompts associated with Requests and Expense Reports.

Click the **Request Preference** link to display the settings.



Expense Preferences

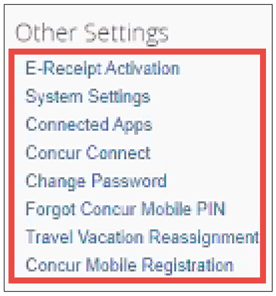
Click the **Expense Preference** link to display the settings.



Select the desired options and click **Save**.

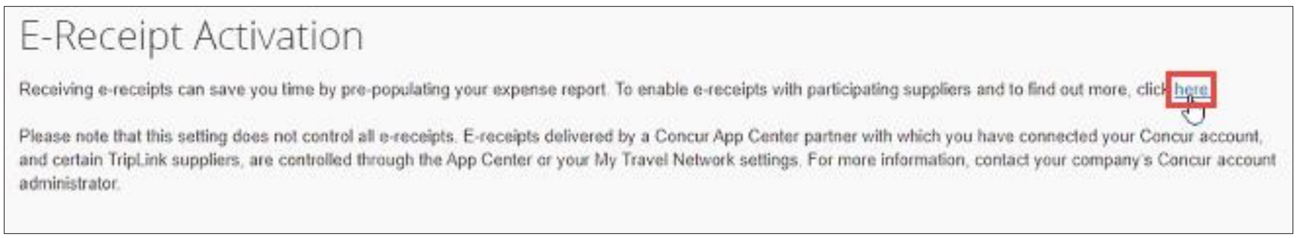
Other Settings

Other Settings include preferences for E-Receipts, language, calendar and number format, Apps from various vendors that you can connect to Concur, and Mobile PIN resets.

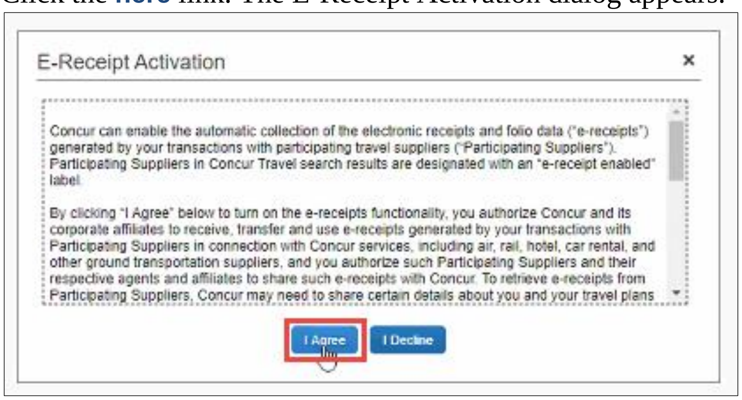


E-Receipt Activation

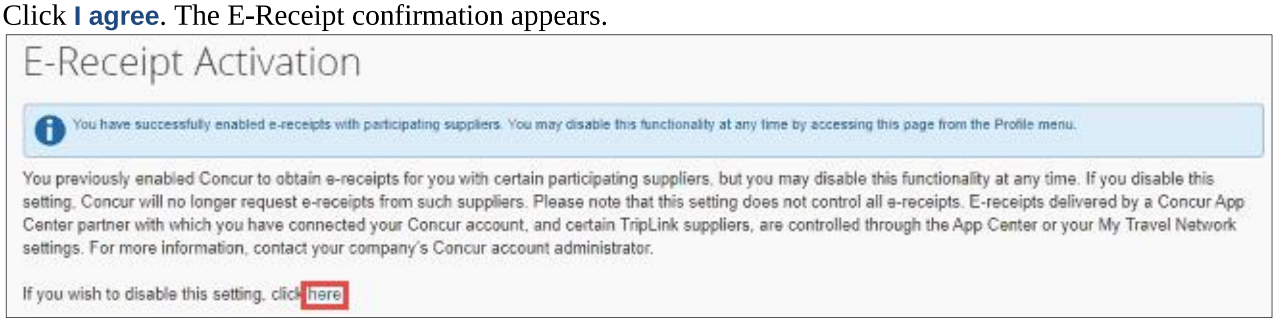
By enabling E-Receipts, you can pre-populate an Expense Report with E-Receipts from participating air, car, and hotel suppliers when you book your travel using Concur.



1. Click the **here** link. The E-Receipt Activation dialog appears.

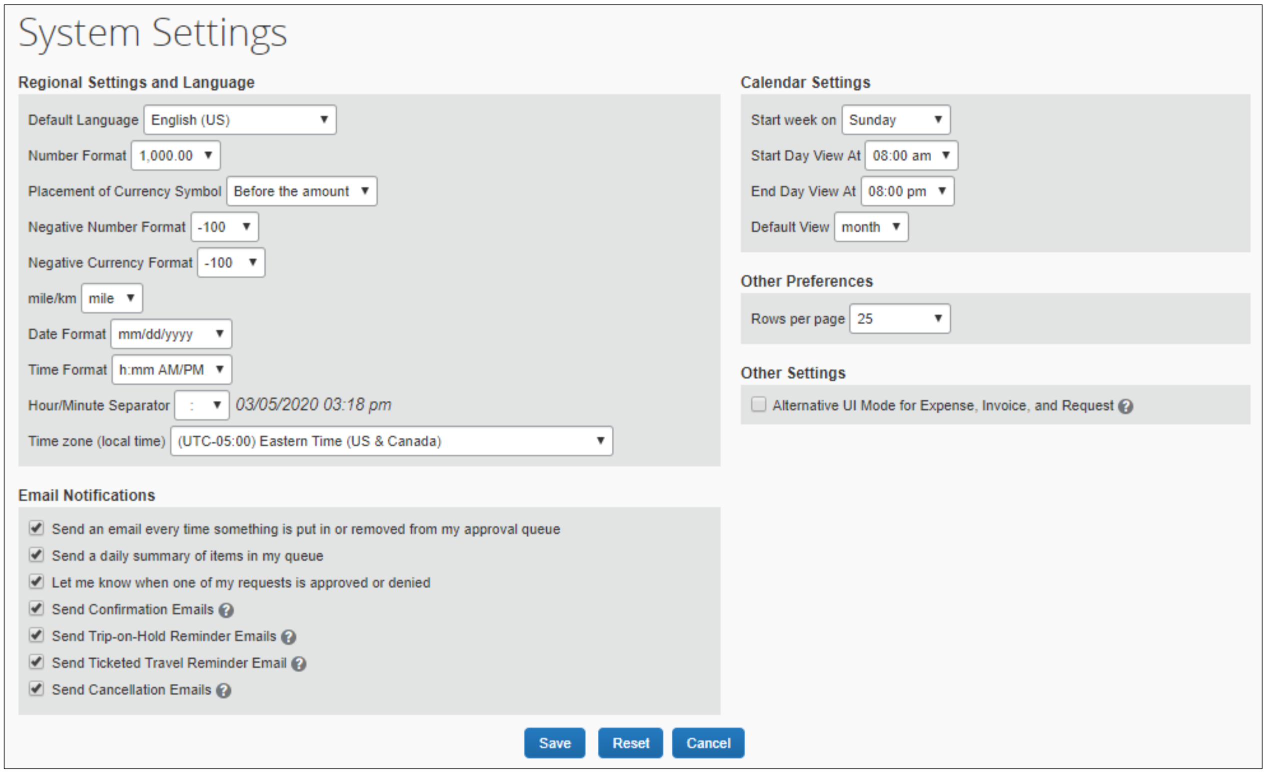


2. Click **I agree**. The E-Receipt confirmation appears.



You can disable the E-Receipts by click the **Here** link again.

System Settings



1. Select the desired **Regional Setting and Language**, **Calendar Settings** or **Other Preferences** settings.
2. Select when to receive **Email Notifications**.
2. Click **Save**.

Connected Apps

The Connected Apps page displays the TripIt app that you can link to Concur to help manage your trips

Concur Connect

Concur Connect displays the apps that are currently linked to Concur account.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com