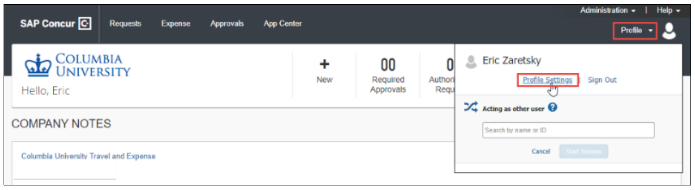
Concur Profile Quick Guide

This Quick Guide covers the basics of setting up your Concur Profile so that you can immediately begin using Concur to book Travel or submit Expense Reports. If you have the benefit of administrative support, you can setup Delegates to update your Concur Profile settings on your behalf. Refer to the Setting up Your Concur Profile for Travel and Expense User Training Guide for detailed instructions on completing your entire Profile.

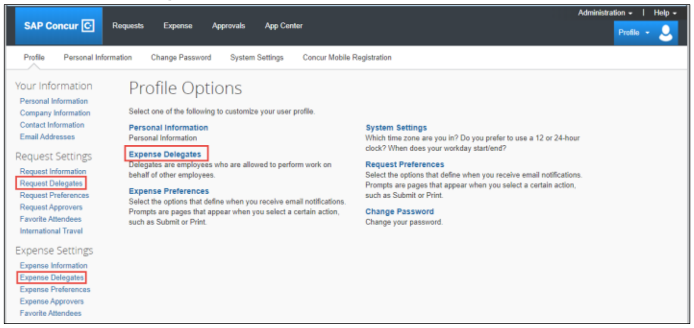
1. Setting Up Delegates

If you have the benefit of administrative support to help you book travel or submit Expense Reports, you can set them up to be your **Delegate** in Concur to act on your behalf. Your delegates can also setup your Concur Profile on your behalf. Refer to the Job Aid: Managing Delegates for detailed instructions on managing delegates.

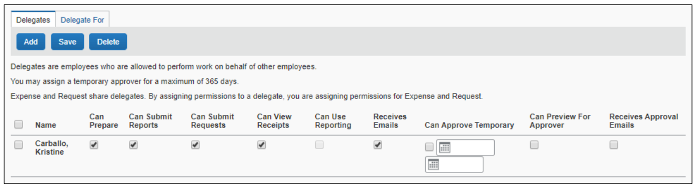
1. Navigate to https://travel-expense.finance.columbia.edu/ and **Log into Concur**. Click **Profile** on the top right of your screen and select **Profile Settings**.



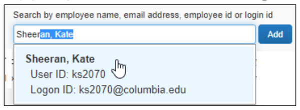
The Profile Page appears.



2. Click **Expense Delegates** (from *Profile Options* or *Expense Settings*) or **Request Delegates**. Delegates' functionality and lists are the same in all places.



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



5. Select the desired match or click the **Add** button next to the search field if your selection is not added.
6. Select the appropriate **checkboxes** to assign the permissions you wish to give the delegate.
Note: *Assigning Delegates permission to Submit Reports or Requests allows them to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate is not able to submit the Expense Report into workflow. You must review the Report for accuracy and completeness prior to submitting into workflow for approval. Clicking Submit Report is the equivalent of you signing the Expense Report to state that everything is appropriate and correct.*
7. Click **Save**.

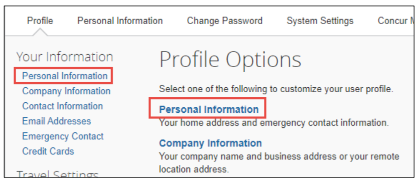
Concur Profile Quick Guide

2. Updating Required Profile Information

If you do not have the benefit of having Delegates who can update your Profile on your behalf, you will need to make sure that your Profile contains certain required information. 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
TSA Secure Flight

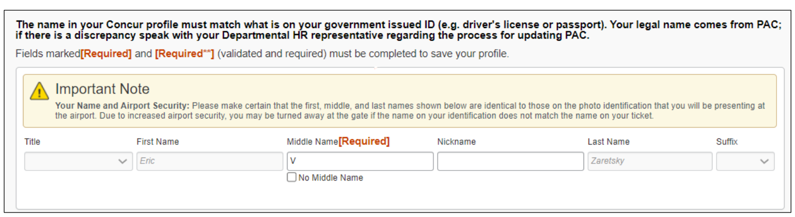
1. Log in to Concur and click **Profile** on the top right of your screen and select **Profile Settings**.
2. Click the **Personal Information** link from the left menu or from the Profile Options.



Scroll to the appropriate sections to update the required fields. These are intermingled with Travel Preferences and other optional sections. After making updates, you can click **Save** anywhere on the page. You cannot click Save on your Profile until all required fields are complete.

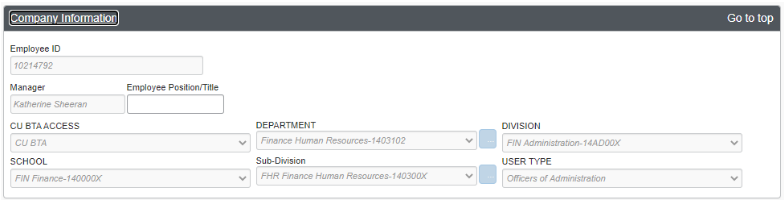
Confirming Your Name

Your name appears as it does in PAC (the University's Human Resources system). Be sure that it matches with how your name appears on your travel documents such as your driver's license and/or passport. If there is a discrepancy, speak with your Departmental HR representative regarding the process for updating PAC, as this is where the information for Concur comes from.



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(s). If you need to change it after entering and saving for the first time, you will not be able to do so yourself and must contact the [Finance Service Center]() to request assistance.

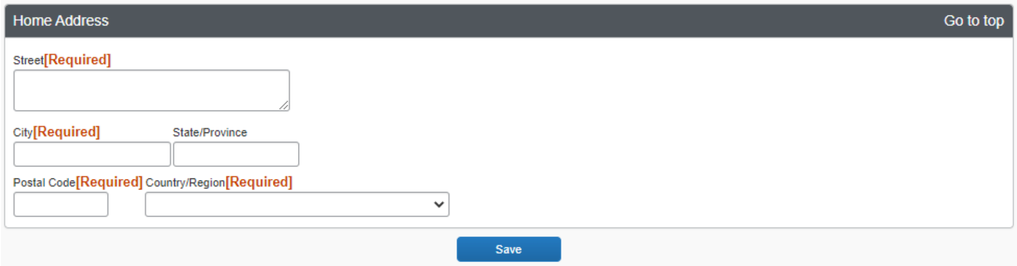
Confirming Company Information



Your **Company Information** (University role, department, etc.) will be pre-populated from PAC. The name of your **Manager** will appear if they are in PAC as your Manager; if you have no Manager in PAC, for example, you are a Faculty member, this field may be blank. If there is a discrepancy, speak with your Departmental HR representative.

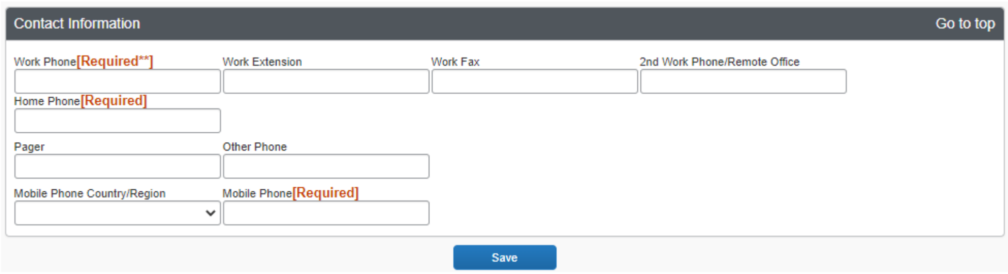
Home Address

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.

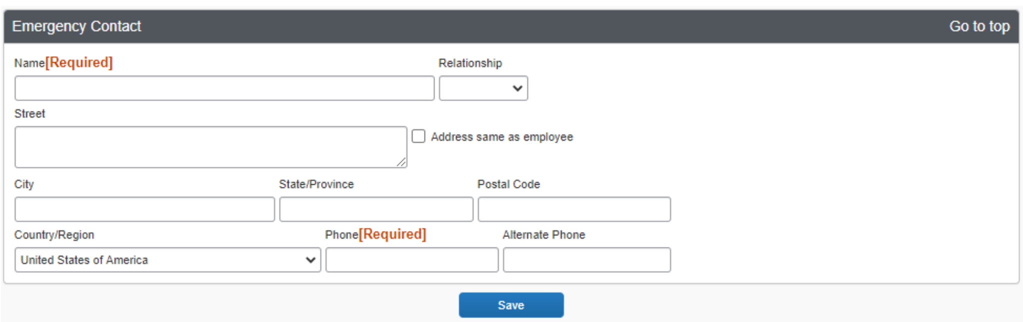
Contact Information



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

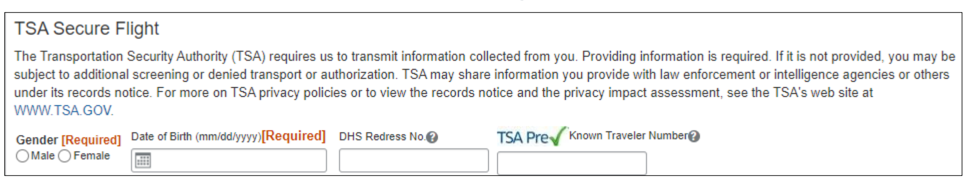
Scroll down to the section for **Emergency Contact**.



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** (this is a TSA requirement, not a University requirement).
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.

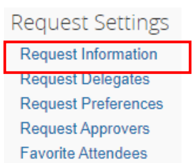
Concur Profile Quick Guide

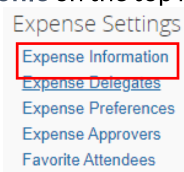
3. Entering a Default ChartString in Your Profile

A **ChartString** is a series of **ChartFields** that track information about your expense and the funding associated with it. By entering a default ChartString in your profile, it is automatically populated in your Expense Reports. If needed, the ChartString information can be edited on individual Expense Reports if it differs from the default. In addition, Expense Reports can be allocated to multiple ChartStrings at the individual Expense lines. The ChartFields in Expense Reports can be modified by the Financial Approver if needed.

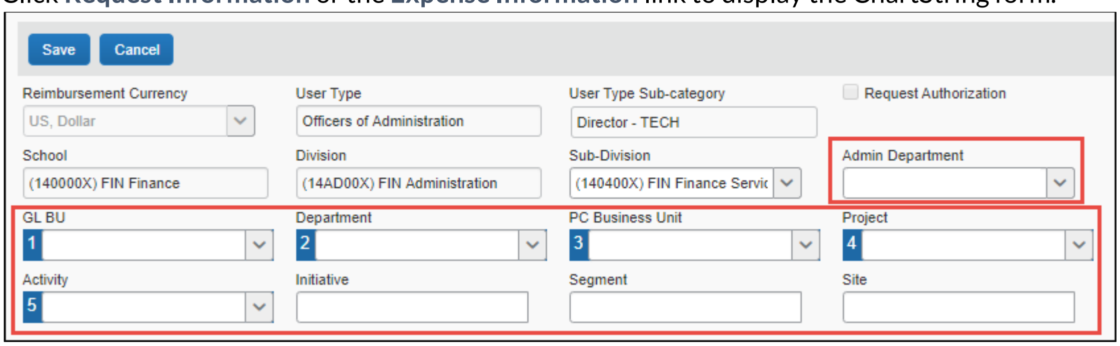
ChartString information is setup in the **Request Settings** or **Expense Settings** sections of your Profile. Settings for Request/Expense Information are exactly the same and updating these settings can be accomplished in either place as the information is identical.

1. Log in to Concur and click **Profile** on the top right of your screen and select **Profile Settings**.





2. Click **Request Information** or the **Expense Information** link to display the ChartString 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 / Reports and have an impact on workflow routing. The **Division** will drive workflow routing to Senior Business Officers, when applicable.
The **Admin Department** will drive approval workflow routing to the Initial Reviewer when applicable. It is possible that your Admin Department may not be populated or is incorrect. Ask your Departmental Administrator for guidance on how to update PAC. Refer to [Job Aid: The Concur Approval Workflow] for additional details.
The **GL BU (1)**, **Department (2)**, **PC Business Unit (3)**, **Project (4)**, and **Activity (5)** ChartFields drive workflow routing to the Financial Approver. These values are a connected list and need to be entered in sequential order. Only budget valid ChartFields are available.

3. Click **Save** after updating the form.

Below is a template that can be completed by the Financial Administrator in your department to assist you with populating the default ChartField values in your profile:

GL BU	Department	PC Business Unit	Project

Activity	Initiative	Segment	Site