CONCUR

User Profile Setup Guide

Accessing Concur

- Users will access Concur by going to the URL www.concursolutions.com.

Concur Travel Profile

- Prior to using Concur Travel to reserve travel, you must review and update your Travel profile.
1. Click **Profile**, and then **Profile Settings**.
2. Click **Personal Information**.
    - Update any fields that do not match your photo identification. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.
3. Verify your **Work Address** and **Home Address** and **Contact Information**.
    - You must input either a work or home phone number and a mobile number.
4. Update and verify your **Email Address**.
    - To verify an email address:
        a. Add and save your email address.
        b. Once you have saved your email address, click the "Verify" link.
        c. Check your email for a verification message from Concur.
        d. Copy the code from the email message into the "Enter Code" box next to the email address.
        e. Click "OK" to submit the code and complete verification.
    - Make sure to add and verify all email addresses that will be used to submit receipts.
    - Email addresses may only be associated with one user profile.

5. Complete the **Emergency Contact** fields as needed.

6. In the **Travel Preferences** section, you can select your discount travel rates/fare classes, special Air, Hotel, and Car Rental Preferences, and add Frequent-Traveler Programs.
    - To add a Frequent-Traveler, Driver, and Hotel Guest Program:
        a. Click the **Add a Program** link to enter up to five memberships at a time.
        b. Use the Radio buttons to select if this is an Air/Rail Carrier, Car Rental Company, or Hotel.
        c. Select the appropriate vendor from the dropdown list, and enter the Frequent Traveler/Driver/Guest Number. Make sure that the information for the membership matches the name in your profile, including middle initial.

MISSISSIPPI STATE
UNIVERSITY.

d. Enter programs exactly as they appear on your card, excluding spaces and dashes. Do not add any additional characters, or the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system.

e. Use the Search this Vendor checkbox to prioritize the search in Travel. Keep in mind that MSU's travel policy will usually override your individual vendor preferences.

f. Continue adding your Frequent-Traveler Programs as needed.

g. Click Save when complete.

7. In the **TSA Secure Flight** section, verify the required Gender and Date of Birth fields. Complete the DHS Redress No. and TSA Precheck Known Traveler Number fields, as needed. Your gender and birth date are required fields.

8. In the **Assistant and Travel Arrangers** section, you can assign an assistant/arranger to view and modify your profile or to book travel and trips on your behalf. Each traveler can have one primary assistant.

9. From the **Credit Cards** section, add your credit card information that you use to book travel. You must have a credit card saved here in order to reserve travel.

o To add a new card:

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

b. Concur recommends that you set a credit card as the default for air, car, and hotel travel. This way, the system will not prompt you to choose a credit card.

c. Make sure that the name on the credit card, the credit card number, the expiration date, and the billing address are all correct and current.

d. In the **Add a Credit card** window, click **Save**.

10. Once you have completed your **Travel Profile** updates, click **Save**.

MISSISSIPPI STATE
U N I V E R S I T Y .

CONCUR

Other Profile Settings

Personal Car

- In order to claim mileage on an expense report, the user must have a car associated with his/her profile.
    1. Click **Profile** and then **Profile Settings**.
    2. Click **Personal Car**.
    3. Click **New**.
    4. Enter either **Yes** or **No** in the **Was a State Car Available?** field.
    5. Select the appropriate option from the **Vehicle Type** drop down box.
       You should select **State Car Available** if you typed **Yes** in the **Was a State Car available?** field.
       You should select **No State Car Available** if you typed **No** in the **Was a State Car available?** field.
    6. Repeat steps 1-5 for the other option (**Yes** or **No**). If you first entered **Yes**, you will now enter **No**. If you first entered **No**, you will now enter **Yes**.
    7. Click **Save**.

Setting up a Delegate

- Concur allows the user to set up a delegate who will be able to prepare Travel Requests and Expense Reports on your behalf. This does not remove the user's responsibility to review and submit the request or report.

- Approvers may set up a delegate to assist with their duties.

    1. Click **Profile**, and then **Profile Settings**.
    2. Click the **Delegates** section for the module you want to work with. (Example: Expense Delegates or Request Delegates)
    3. Click **Add**.
    4. Use the search box to find the delegate and click **Add**.
    5. Use the check boxes to assign permissions to the delegate.
    6. Click **Save**.

MISSISSIPPI STATE
UNIVERSITY.

Setting up a Travel Arranger

- Concur allows the user to set up a Travel Arranger who will be able to make travel reservations on your behalf.
  1. Click **Profile** and then **Profile Settings**.
  2. From the Travel Settings section, click **Assistants/Arrangers**.
  3. Click **Add an Assistant**.
  4. Use the search box to find the assistant, and use the check boxes to assign permissions to the assistant.
  5. Click **Save**.