

Initial Employee Profile Setup

New Concur users will need to sign into Concur using [OSU's Single Sign on Portal](#) (SSO) before they are able to setup their initial profile. Upon successful login, you can modify your user profile and add additional information.

All employees, including student employees, will have initial profiles setup based on their active human resources (HR) employee record. Employee profiles will automatically update when changes are made to the following HR employee record fields:

- Employee Name
- Employee ID
- Email
- Direct Supervisor
- Department

Any issues with your profile data should be reported to your Human Resources Service Center Team for [Academic Units](#) or [Administrative Units](#).

Update User Information

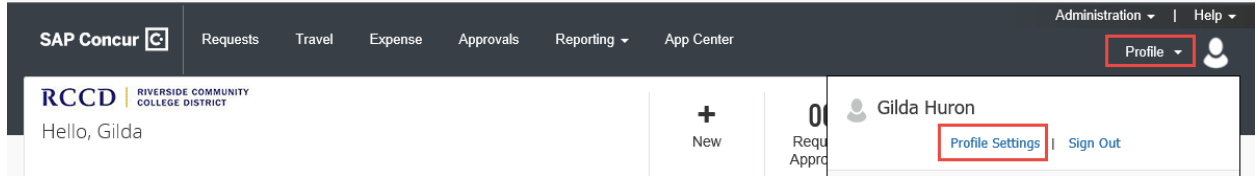
Please review and update your Concur profile before you start a travel request or expense report. Some sections must be completed before travel can be booked. This includes the following fields: full name, contact information, emergency contact, and TSA information.

Instructions

- Login to [Concur](#) using your ONID ID and password
- From the Concur homepage, in the top right corner click on "Profile" and select "Profile Settings"

User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR



- At a minimum, we recommend all users to review the following sections:
 - Personal Information
 - Company Information
 - Contact Information
 - Travel Profile Options
 - Activate Triplt Pro, Frequent Traveler Programs, TSA/Passport details
 - Mobile Registration
 - E-Receipts

A screenshot of the 'Profile Options' page in SAP Concur. The page is divided into several sections, each with a title and a brief description. The sections are: 'Personal Information' (Your home address and emergency contact information.), 'Company Information' (Your company name and business address or your remote location address.), 'Credit Card Information' (You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.), 'Travel Vacation Reassignment' (Going to be out of the office? Configure your backup travel manager.), '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.), '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?), 'Contact Information' (How can we contact you about your travel arrangements?), 'Travel Profile Options' (Carrier, Hotel, Rental Car and other travel-related preferences.), '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.), and 'Concur Mobile Registration' (Set up access to Concur on your mobile device). The 'Personal Information', 'Company Information', 'Contact Information', 'Travel Profile Options', and 'Concur Mobile Registration' sections are highlighted with red boxes.

Personal Information

User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR


Make certain that the first, middle, and last name shown is identical to that on the photo ID that you will be presenting at the airport. **Do not book travel if this information is incorrect and immediately connect with your HR Service Center Team for [Academic Units](#) or [Administrative Units](#) to have your information updated.**

My Profile - Personal Information

Jump To: Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

[Change Picture](#) 

Important Note

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. 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.

| | | | | | |
|----------------------|------------------------------------|---|----------------------|------------------------------------|----------------------|
| Title | First Name | Middle Name [Required] | Nickname | Last Name | Suffix |
| <input type="text"/> | <input type="text" value="Gilda"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="Huron"/> | <input type="text"/> |
| | | <input type="checkbox"/> No Middle Name | | | |

Email Address

Once you verify your email address, Concur can associate information forwarded from that email address to your Concur account. With your verified email address, you can:

- Forward your travel plans to plans@concur.com to have your reservations added to your trips.
- Forward your receipts and/or images to receipts@concur.com to have your receipts uploaded into your Available Receipts.

Emergency Contact

Make sure this section is updated and kept current with the name and contact information for whomever you designate as your emergency contact.

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SETTING UP YOUR PROFILE IN CONCUR

The screenshot shows a form titled "Emergency Contact" with the following fields and options:

- Name: [Text Input]
- Relationship: [Dropdown Menu] (Selected: Spouse)
- Street: [Text Input]
- Address same as employee:
- City: [Text Input] (Value: Riverside)
- State/Province: [Text Input] (Value: CA)
- Postal Code: [Text Input]
- Country/Region: [Dropdown Menu] (Value: United States of America)
- Phone: [Text Input]
- Alternate Phone: [Text Input]
- Save: [Blue Button]

Travel Preferences, Existing Ticket Credits, TSA Secure Flight, & International Travel





Travel Preferences

Under the Travel Preferences section, you can enter in information for eligible discounts (*i.e.*, AAA, military) and update your needs and preferences for air travel, hotel accommodations, and car rentals.

Within this section you can also enter in your existing membership information for traveler reward programs in the Frequent-Traveler Programs and Advantage Programs subsections.

The screenshot shows the "Frequent-Traveler Programs" section with the following content:

Your Frequent Traveler, Driver, and Hotel Guest Programs

| | | |
|---|---|--------------------------------|
|  | American Airlines  | American Airlines AA Advantage |
|  | HYATT  | Hyatt (HY) World of Hyatt |

Existing Ticket Credits

If you have existing airlines credits booked through CTP you can view them under Unused Tickets.

TSA Secure Flight

User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

All travelers are **required** to update their gender & date of birth under the TSA Secure Flight section. If you have TSA Pre-check or Global Entry data, you should also enter this information.

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

| | | | |
|---|--------------------------------------|----------------------|---------------------------------|
| Gender [Required] | Date of Birth (mm/dd/yyyy)[Required] | DHS Redress No.? | TSA Pre✓ Known Traveler Number? |
| <input type="radio"/> Male <input type="radio"/> Female | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Note: Concur offers only two options for gender in the TSA Secure Flight section, which is incredibly limiting for some members of our community. The TSA Secure Flight information needs to match your photo ID when you arrive at the airport. If you identify as non-binary, non-gender conforming, or have "X" listed as the gender on your photo ID, please contact Corporate Travel Planners and they will help with your travel arrangements to reduce your hassles or problems with TSA security screenings.

International Travel: Passports and Visas

If you are planning to travel internationally, please enter your passport or visa information in this section. *Note: This is not required information unless travelling internationally.*

Activating Mobile Devices

With the SAP Concur mobile app, you can:

- Take pictures of receipts and attach them to your profile for use in preparing and submitting Expense Reports
- Manage trips and Expense Reports while on the go
- Prepare, submit, and approve Expense Reports

To enable mobile access via SSO, complete the following steps:

User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

- Download the SAP Concur mobile app through the [Apple App Store](#) and [Google Play](#), or, have the link e-mailed to you by clicking “Get Started” under the Concur Mobile Registration section in your Profile Settings.
- Open the Concur app on your mobile device and login with your ONID email and select SSO Company Code Sign In.

E-Receipts

E-Receipts are electronic receipts that are attached to user profiles and can be attached to Expense Entry line items. Participating Vendors (most hotel chains, airlines, car rental agencies) will provide detail data that is used for generating an electronic receipt. If the participating vendor e-mails you an e-receipt using your e-mail address that is associated with your Concur account, the **E-Receipt** should show up among your **Available Receipts** within the **Expense** tab, which you can then use in creating an **Expense Report**.

Activate E-Receipts

On the **Profile Options** page, click **E-Receipt Activation**.

User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

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

Expense Settings

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

Other Settings

- E-Receipt Activation**
- System Settings
- Connected Apps

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.
- 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.
- Concur Mobile Registration**
Set up access to Concur on your mobile device
- 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?
- Contact Information**
How can we contact you about your travel arrangements?
- E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.
- 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.
- Change Password**
Change your password.

On the **E-Receipt Activation** page, select the linked word **Here** to activate e-receipts.

SAP Concur | Requests | Travel | Expense | Approvals | App Center | Help

Profile | Personal Information | Change Password | System Settings | Concur Mobile Registration | Travel Vacation Reassignment

E-Receipt Activation

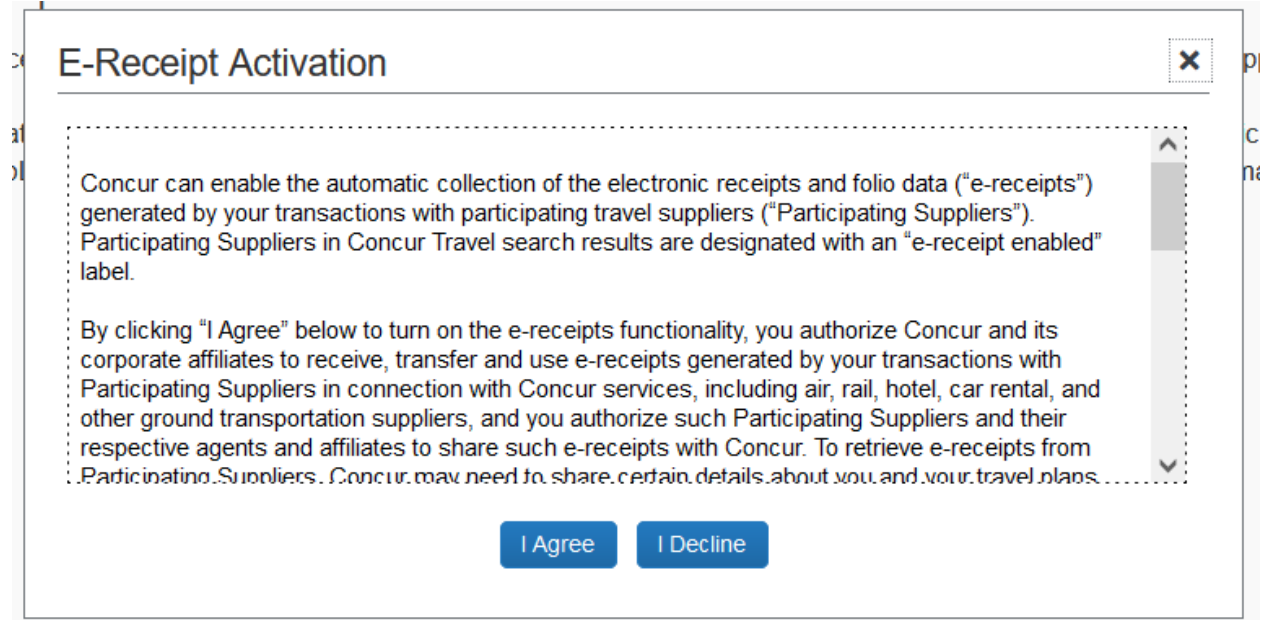
Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more [click here](#).

Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator.

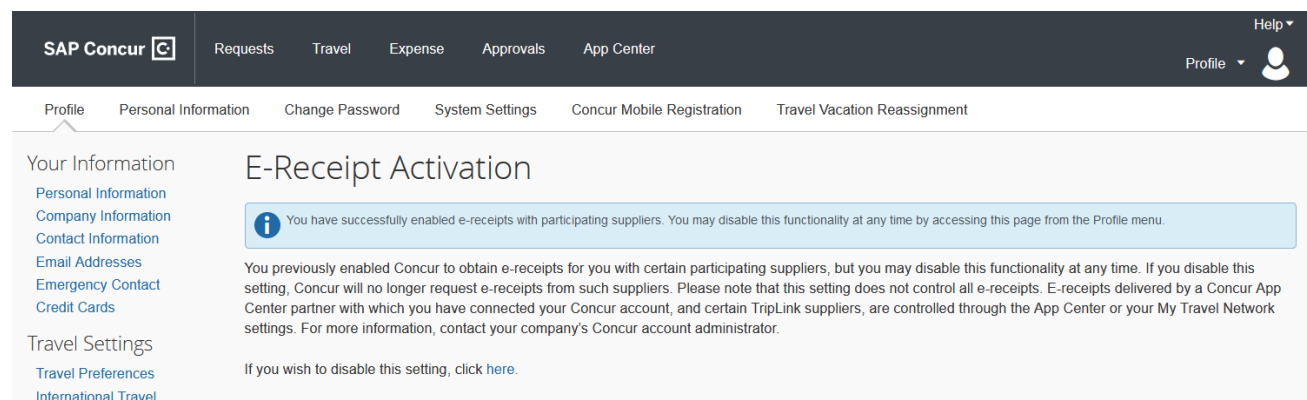
User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

Read through the E-Receipt Activation agreement in the popup window, and then select **I Agree** or **I Decline**.



If you select **I Agree**, then E-Receipts will be successfully enabled and you will receive a blue informational message that reads "You have successfully enabled e-receipts with participating suppliers. You may disable this functionality at any time by accessing this page from the Profile menu."



User Profile Setup

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Once your entire profile has been completed, click any of the visible **Save** buttons. If any errors occur, a pop-up message will inform you of any corrections that are needed. Correct the errors and click **Save** again.

Once the profile has been saved a **Profile Saved** message will appear in the upper righthand portion of the screen.

Still have questions? Contact us!

Questions related to *travel*:

Travel@oregonstate.edu

Questions related to *credit cards*:

Procurement.Cards@oregonstate.edu

Website: fa.oregonstate.edu/travel-and-expense