



## 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 and graduate assistants, 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

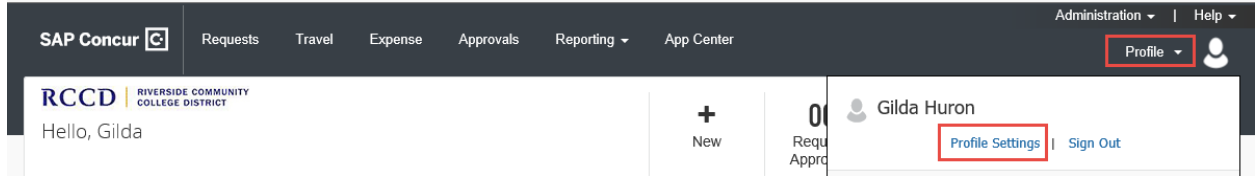
Please review and update your Concur profile before you start a travel request or expense report. Some sections must be completed before travel can be booked. This includes the following fields: full name, contact information, emergency contact, and TSA information.

### Instructions

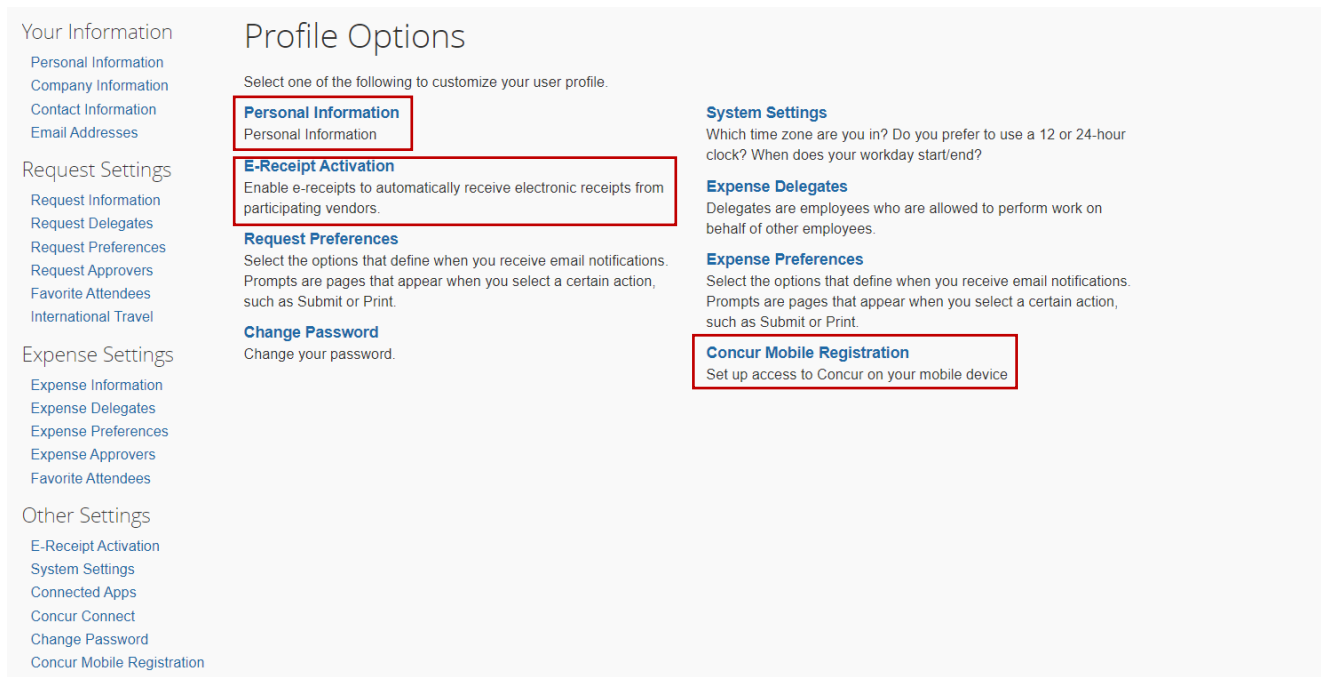
- Login to [Concur](#) using your ONID email and password
- From the Concur homepage, in the top right corner click on "Profile" and select "Profile Settings"

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR



- At a minimum, we recommend all users to review the following sections:
  - Personal Information
    - Contact Information, Frequent Traveler Programs, TSA/Passport details
  - E-Receipt Activation
  - Concur Mobile Registration



## Personal Information

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.**

# User Profile Setup


SETTING UP YOUR PROFILE IN CONCUR

## My Profile - Personal Information

Jump To: Personal Information  Choose

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 <b>[Required]</b>	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				

## Work Address

The default **Work Address** that shows is for the main OSU campus in Corvallis. You can update the street address, city, and postal code.

Work Address Go to top

**Please make sure your state is abbreviated, IE. CO and not spelled out and there is not punctuation in your address. #,/, are not writable fields and will cause errors.**

Company Name  Assigned Location

Street   Address same as assigned location

City  State/Province

Postal Code  Country/Region

## Home Address

If you are traveling, we recommend that you fill out your **Home Address**. This field is not required.

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

The screenshot shows the 'Home Address' form. At the top right is a 'Go to top' link. Below the title is a yellow warning message: 'Please make sure your state is abbreviated, IE. CO and not spelled out and there is not punctuation in your address. #,/, are not writable fields and will cause errors.' The form contains the following fields: a 'Street' text box; 'City' and 'State/Province' text boxes with an 'OR' label between them; 'Postal Code' and 'Country/Region' text boxes, with a dropdown menu for 'Country/Region' currently showing 'United States of America'. A blue 'Save' button is located at the bottom center.

## Contact Information

The **Contact Information** field requires your (1) work phone, (2) home phone, and (3) mobile phone. This is important information if you are traveling.

The screenshot shows the 'Contact Information' form. At the top right is a 'Go to top' link. The form contains the following fields: 'Work Phone [Required\*\*]', 'Work Extension', 'Work Fax', and '2nd Work Phone/Remote Office' text boxes; 'Home Phone [Required]' text box; 'Pager' and 'Other Phone' text boxes; 'Mobile Phone Country/Region' dropdown menu (showing 'United States of America (+1)') and 'Mobile Phone [Required]' text box. A blue 'Save' button is located at the bottom center.

## 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 receipts and/or images to [receipts@concur.com](mailto:receipts@concur.com) to have your receipts uploaded into your **Available Receipts** under the **Expenses** tab.

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

Email Addresses Go to top

Please add at least one email address.

[How do I add an email address?](#)  
[How do I verify my email address?](#)  
[Why should I verify my email address?](#)  
[If I am a travel arranger or delegate, what do I need to do?](#)  
[I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?](#)

[+ Add an email address](#)

Email Address	Verification Status	Verify	Contact?	Actions
Email 1	✓ Verified	<a href="#">Disable Verification</a>	Yes	<a href="#">✎</a>
Email 2	✓ Verified	<a href="#">Disable Verification</a>	No	<a href="#">✎</a> <a href="#">🗑</a>

You can set up and verify multiple email addresses to be associated with Concur.

## Emergency Contact

If you are traveling, make sure this section is updated and kept current with the name and contact information for whomever you designate as your emergency contact.

Emergency Contact

Name  Relationship

Street   Address same as employee

City  State/Province  Postal Code

Country/Region  Phone  Alternate Phone

[Save](#)

## 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.

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

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.

Frequent-Traveler Programs		
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

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](http://WWW.TSA.GOV).

Gender **[Required]**  Male  Female    Date of Birth (mm/dd/yyyy) **[Required]**     DHS Redress No.     TSA Pre  Known Traveler Number

*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*

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

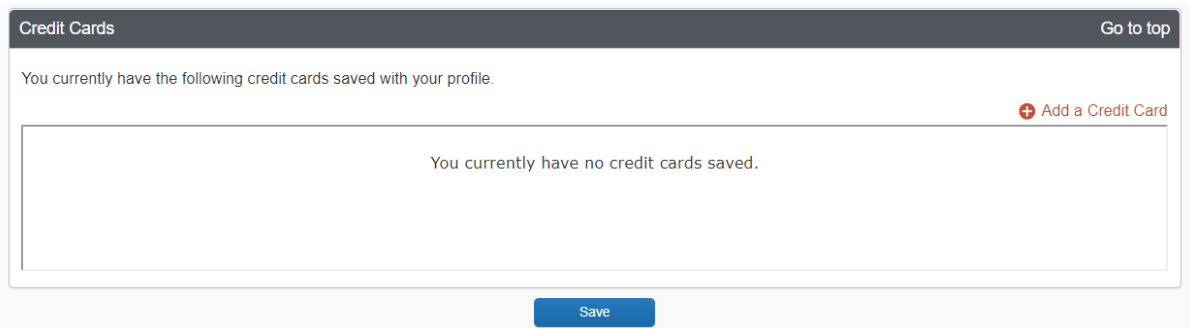
*Corporate Travel Planners and they will help with your travel arrangements to reduce your hassles or problems with TSA security screenings.*

## *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.*

## Credit Cards

If you have a university Travel & Expense card or a Department card, you can enter in your card information here and use your card when you are reserving a hotel within Concur.



The screenshot shows a web interface for managing credit cards. At the top, there is a dark header with the text "Credit Cards" on the left and "Go to top" on the right. Below the header, a message states "You currently have the following credit cards saved with your profile." To the right of this message is a red plus sign icon followed by the text "Add a Credit Card". Below this is a large, empty rectangular box with the text "You currently have no credit cards saved." centered inside. At the bottom of the interface is a blue button labeled "Save".

## 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

The screenshot shows the 'Profile Options' section of the SAP Concur user profile setup. On the left is a navigation menu with categories: '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, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Connected Apps, Concur Connect, Change Password, Concur Mobile Registration). The main content area is titled 'Profile Options' and includes a sub-header 'Select one of the following to customize your user profile.' Below this are several options: 'Personal Information', 'E-Receipt Activation' (highlighted with a red box), 'Request Preferences', 'Change Password', 'System Settings', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. Each option has a brief description of its function.

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

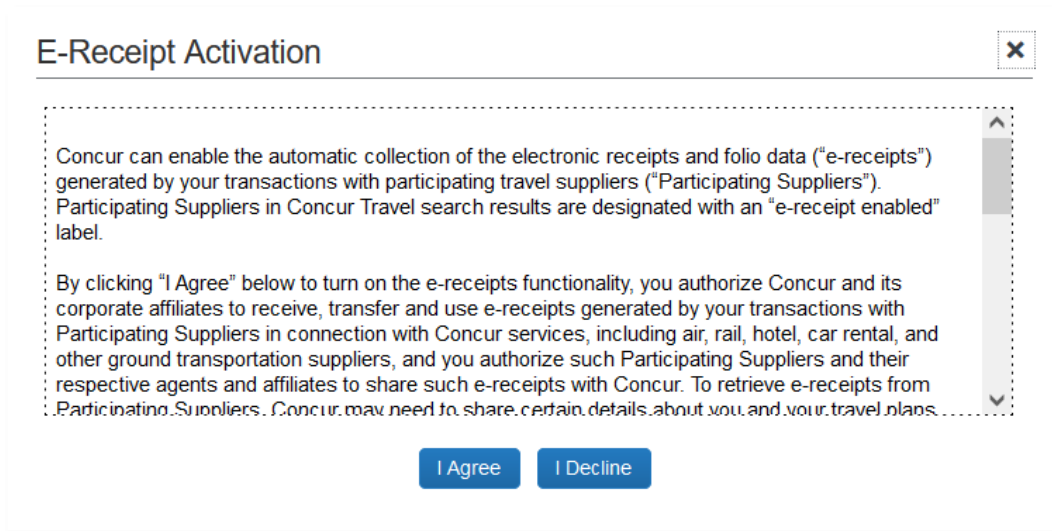
The screenshot shows the 'E-Receipt Activation' page in the SAP Concur user interface. The top navigation bar includes 'SAP Concur' and tabs for 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. Below the navigation bar is a breadcrumb trail: 'Profile > Personal Information > Change Password > System Settings > Concur Mobile Registration > Travel Vacation Reassignment'. The main content area is titled 'E-Receipt Activation' and contains the following text: '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](#).' Below this is a note: '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.' The 'click here' link is highlighted with a red box.

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

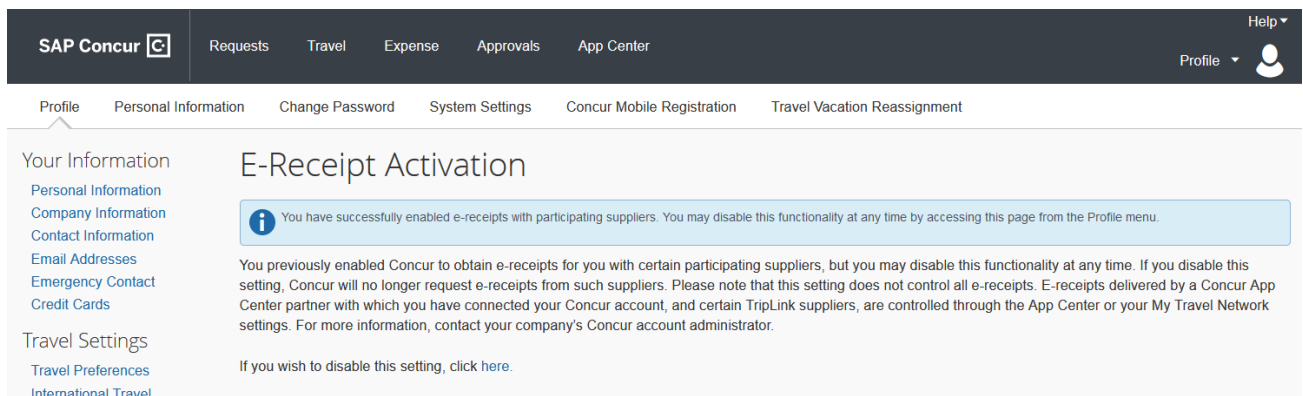


# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR



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."



## 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

# User Profile Setup

SETTING UP YOUR PROFILE IN CONCUR

- Prepare, submit, and approve **Expense Reports**

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

- 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.

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](mailto:Travel@oregonstate.edu)

Questions related to **credit cards**:

[Procurement.Cards@oregonstate.edu](mailto:Procurement.Cards@oregonstate.edu)

Website: [fa.oregonstate.edu/travel-and-expense](https://fa.oregonstate.edu/travel-and-expense)