Oregon State University

User Profile Setup

SETTING UP YOUR USER PROFILE IN CONCUR

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"

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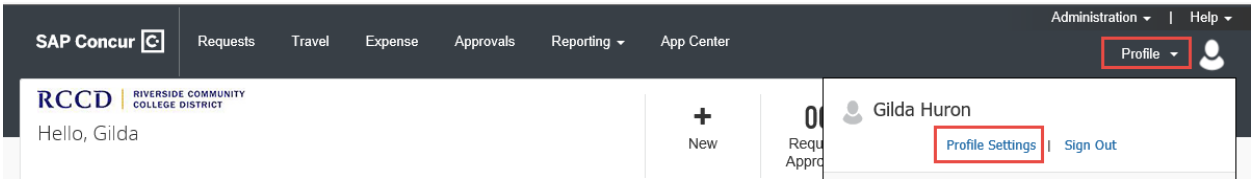
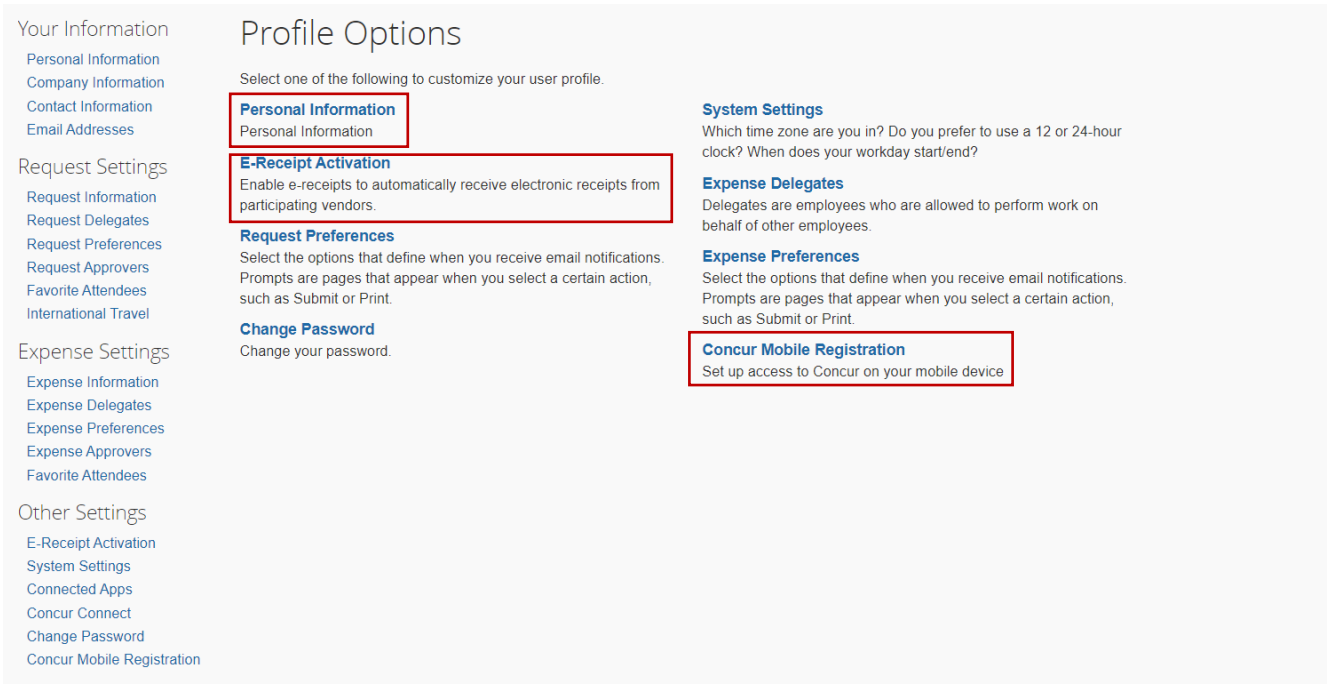
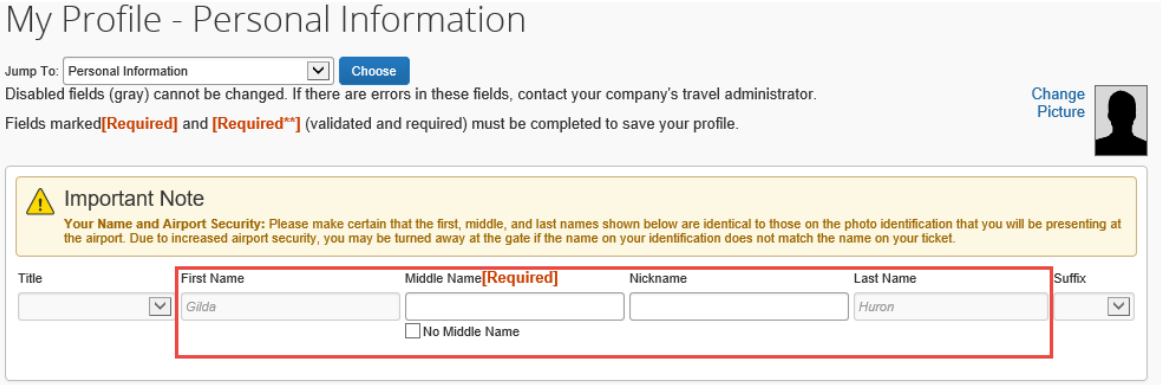


- At a minimum, we recommend all users to review the following sections:
  - Personal Information
    - Contact Information, Frequent Traveler Programs, TSA/Passport details
  - E-Receipt Activation
  - Concur Mobile Registration



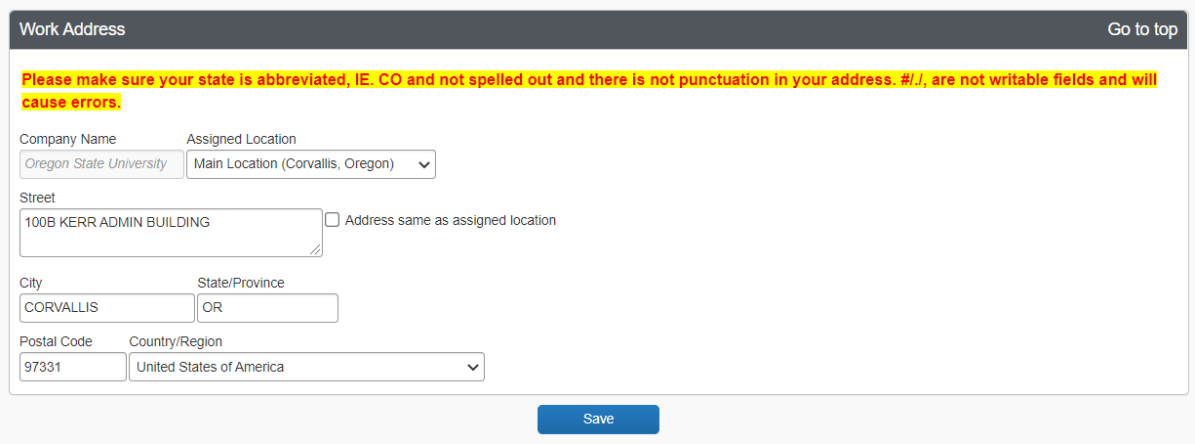
Personal Information

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.**



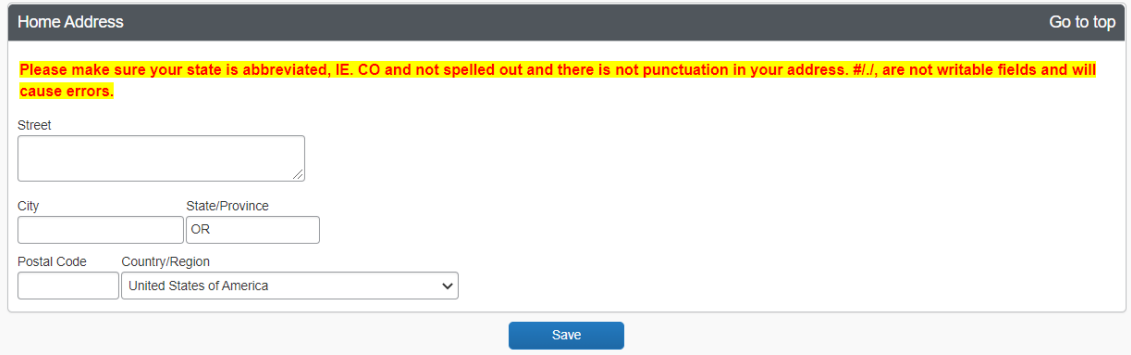
Work Address

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



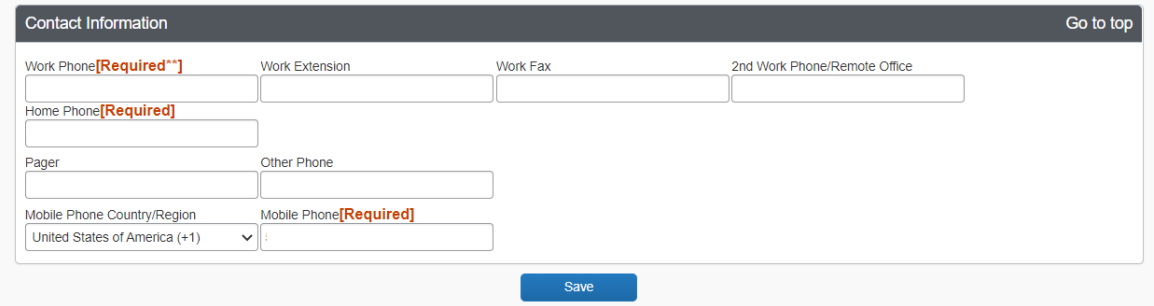
Home Address

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



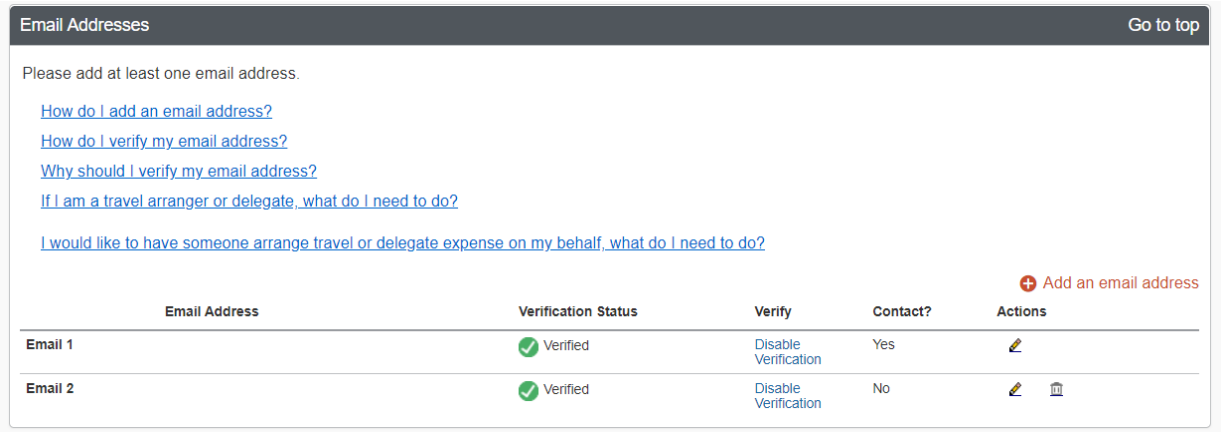
Contact Information

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



Email Address

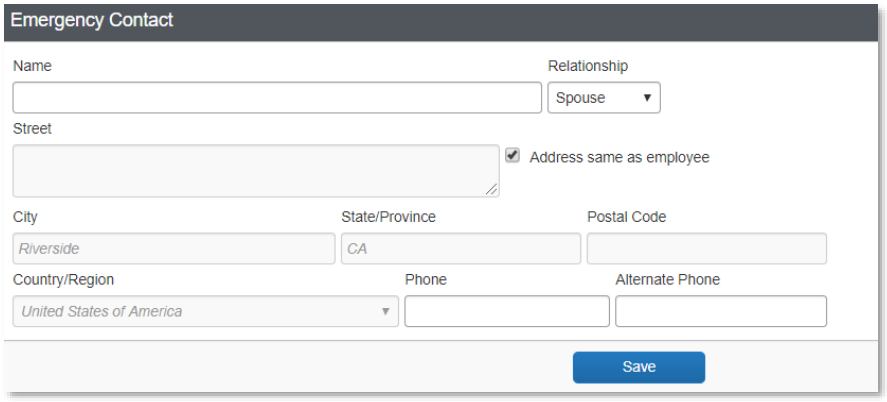
Once you verify your email address, Concur can associate information forwarded from that email address to your Concur account. With your verified email address, you can forward your receipts and/or images to **receipts@concur.com** to have your receipts uploaded into your **Available Receipts** under the **Expenses** tab.



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.

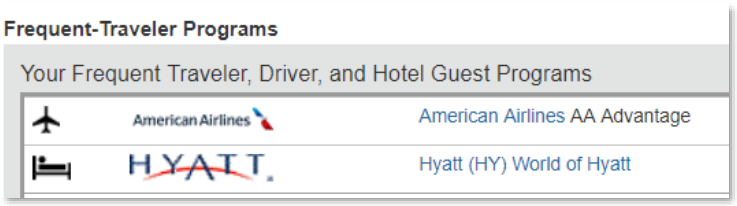


Travel Preferences, Existing Ticket Credits, TSA Secure Flight, & International Travel

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.

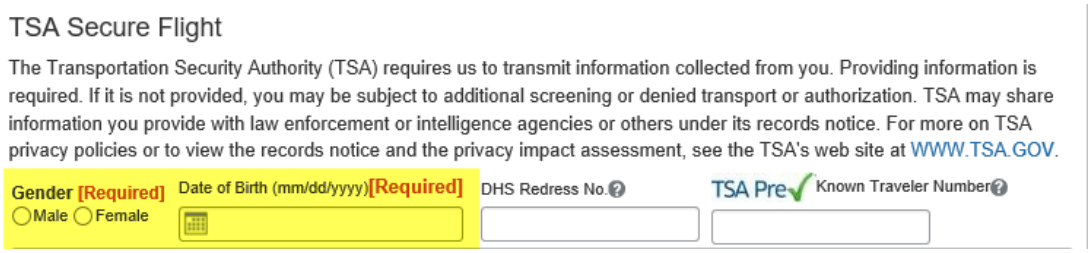


Existing Ticket Credits

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.



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

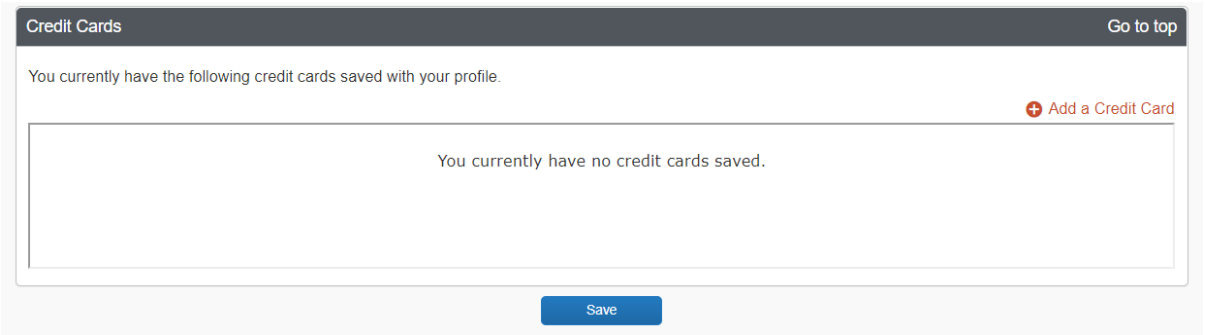
Corporate Travel Planners and they will help with your travel arrangements to reduce your hassles or problems with TSA security screenings.

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.*

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.

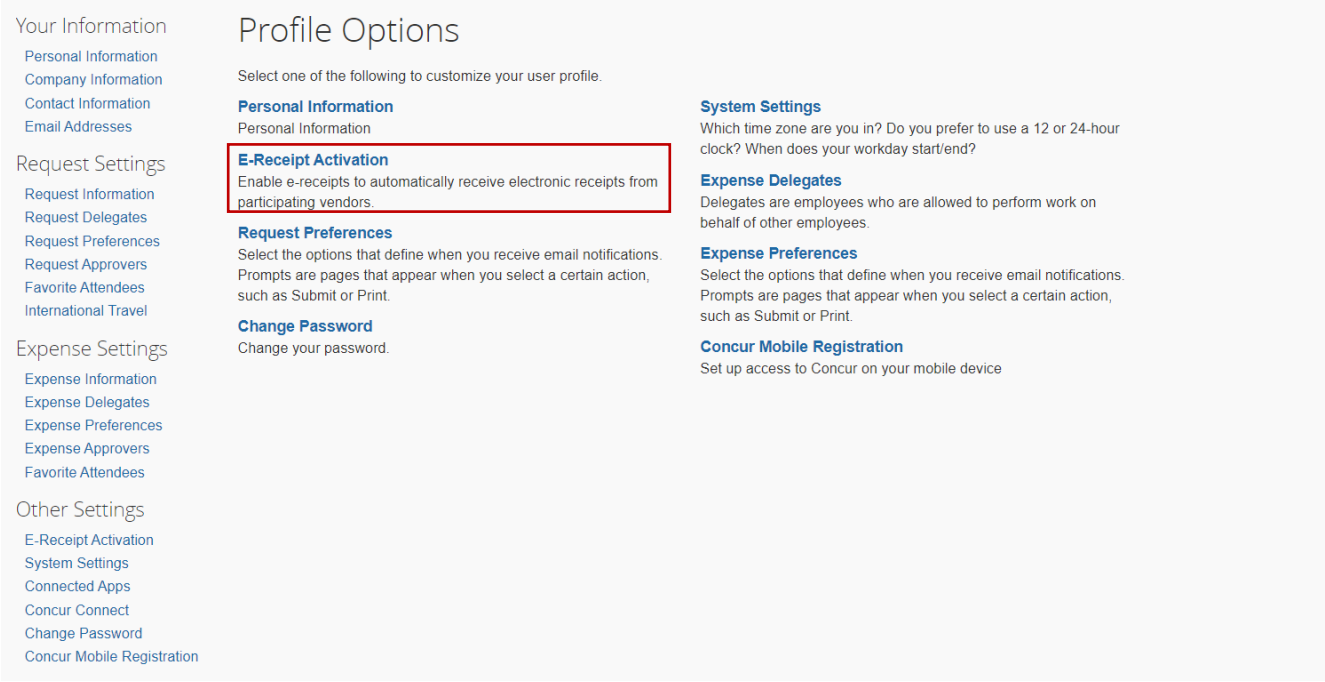


E-Receipts

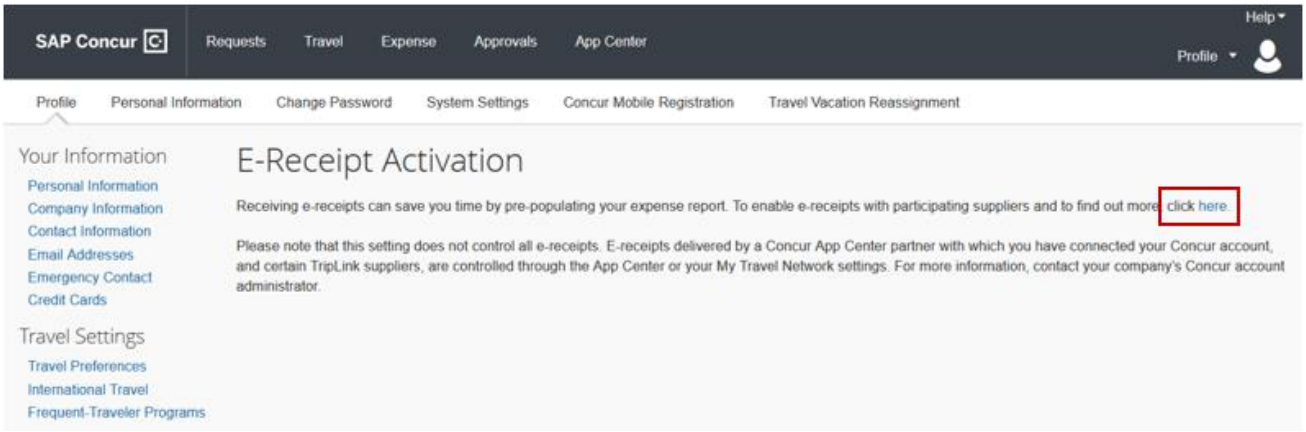
E-Receipts are electronic receipts that are attached to user profiles and can be attached to Expense Entry line items. Participating Vendors (most hotel chains, airlines, car rental agencies) will provide detail data that is used for generating an electronic receipt. If the participating vendor e-mails 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

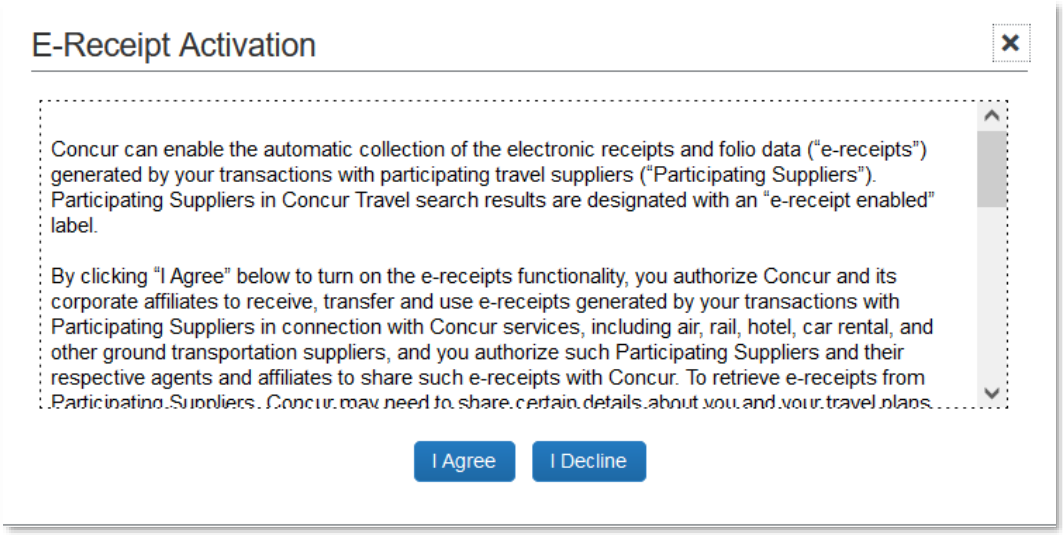
On the **Profile Options** page, click **E-Receipt Activation**.



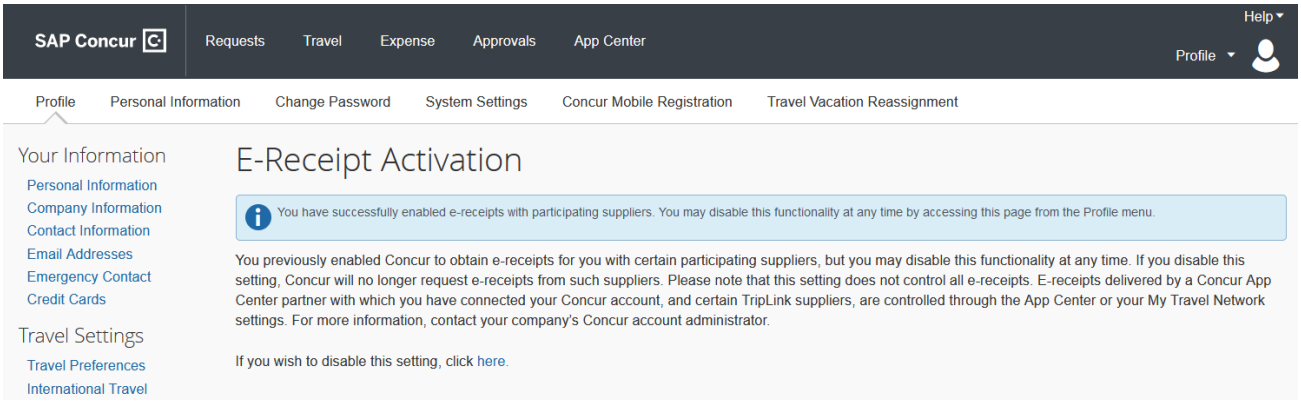
On the **E-Receipt Activation** page, select the linked word **Here** to activate e-receipts.



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."



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:

- 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

*Questions related to **credit cards**:*
Procurement.Cards@oregonstate.edu

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