



Section 1: Getting Started

If you are a full or part-time employee of the University of Oklahoma, you already have access to Concur Travel and Expense. Students will not have access to this travel system.

Logging in to Concur Travel & Expense

When logging into Concur for the first time:

1. Go to www.concursolutions.com.
2. In the **User Name** field, enter your **OU email address**.
3. Click on the **Forgot your password?** hyperlink.
4. Choose the **Send me an email with a link to reset my password**.
5. Click **Submit**.
6. Click **Yes** to confirm that you want to receive an email with a link to reset your password.
7. You will receive an email from DoNotReply@concursolutions.com with a link to Concur allowing you to type in a password and hint.
8. Once you have successfully created a password, you will be automatically logged into Concur.

If you forget your password after you successfully log on to Concur, repeat the above steps.



Concur Training Guide

Section 2: Concur Navigation

Explore the available options

1. Explore the [Trip Search](#) section.
2. Locate the [My Trips](#) section.
3. Explore the [Alerts](#) section.
4. Explore the [Company Notes](#) section. Remember to click on the [Read more](#) button.
5. Locate the [My Tasks](#) section.
6. Locate the [Expense](#) section.
7. Locate the [Approvals](#) section (only available if you are an approver).



The screenshot shows the Concur web application interface for a user named Susan. The top navigation bar includes 'CONCUR', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Expense' and 'Approvals' tabs are highlighted with red boxes. The main content area is divided into several sections:

- TRIP SEARCH** (highlighted with a red box): Contains a search form for flights, including fields for departure and arrival cities, and a 'Search' button.
- ALERTS** (highlighted with a red box): Displays a notification about Microsoft ending support for Internet Explorer 8 and 9.
- COMPANY NOTES** (highlighted with a red box): Lists notes such as 'Deployment Toolkit' and 'Concur Training Toolkit'.
- MY TRIPS (0)** (highlighted with a red box): Shows 'You currently have no upcoming trips.'
- MY TASKS** (highlighted with a red box): Displays three task cards: 'Required Approvals' (0), 'Available Expenses' (0), and 'Open Reports' (0), each with a checkmark icon.
- FACTS & STATS**: Contains two 'Did you know?' tips about passport expiration and expense reporting efficiency.



Section 3: Update Your Profile

Update your Personal Information

1. At the top of the [Concur](#) page, click [Profile](#) then [Profile Settings](#).
2. On the left side of the page, click [Personal Information](#).
3. On the [Personal Information](#) page, there are required fields you will need to update.
4. Once updates are complete, click [Save](#).

Some of the sections under your personal profile will be required and others will be optional. The heading of each section will note if the field requires your review.

Step 1: Your Name and Airport Security - Required

Verify that your first and last name is correct. Add your middle name or initial, or check the box for no middle name. A suffix or title can be added. This should match the government issued photo ID, such as a driver's license or passport, which you will present to airport security.

Note: First and last name has been populated from Payroll and Employee Services and cannot be updated in Concur. Contact PES to make any necessary changes.

Step 2: Contact Information - Required

Enter either a Work Phone or Home Phone. We highly recommend that you register your mobile devices. A mobile device will allow you to receive text messages from Concur informing you of any cancelled or delayed airline flights in addition to informing you of potential risk in your travel area.

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="Susan"/>	<input type="text" value="S"/>	<input type="text"/>	<input type="text" value="Strout"/>	<input type="text"/>
		<input type="checkbox"/> No Middle Name			

Contact Information

Please note that you only need either a Work or Home phone number required in your profile.

Work Phone [Required**]	Work Extension	Work Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
2nd Work Phone/Remote Office	Home Phone [Required**]	
<input type="text"/>	<input type="text"/>	
Pager	Other Phone	
<input type="text"/>	<input type="text"/>	
Mobile Phone <input type="text" value="United States of America (+1)"/> <input type="text"/> <input type="button" value="Send Test Message"/>		

****You must specify either a home phone or a work phone.**



Section 3: Update Your Profile *(continued)*

Step 3: Email Addresses - Required

Your OU email address has been populated from PES but you should “verify” your email address with Concur. By verifying your email address, Concur can associate your email address with your Concur account. This verification will enable receipts to be emailed to receipts@concur.com so they are visible in Concur in the available receipts section. It also enables itinerary information to be emailed to plans@concur.com.

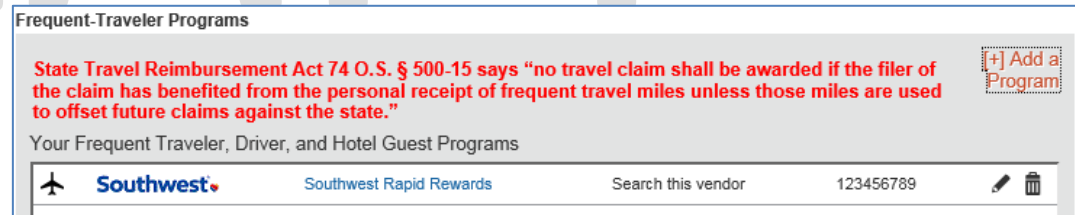
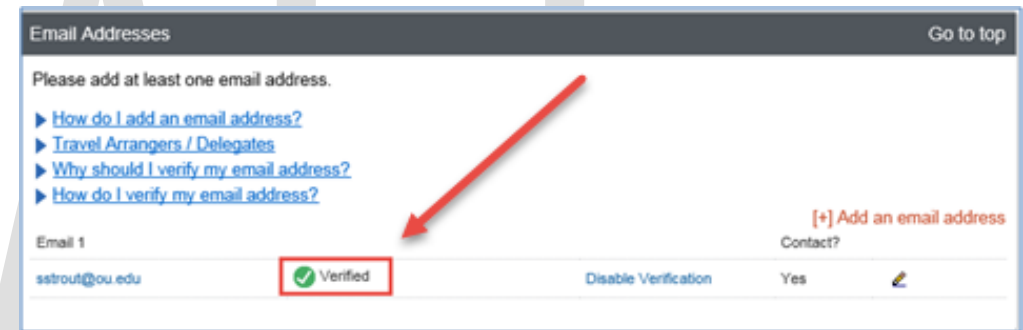
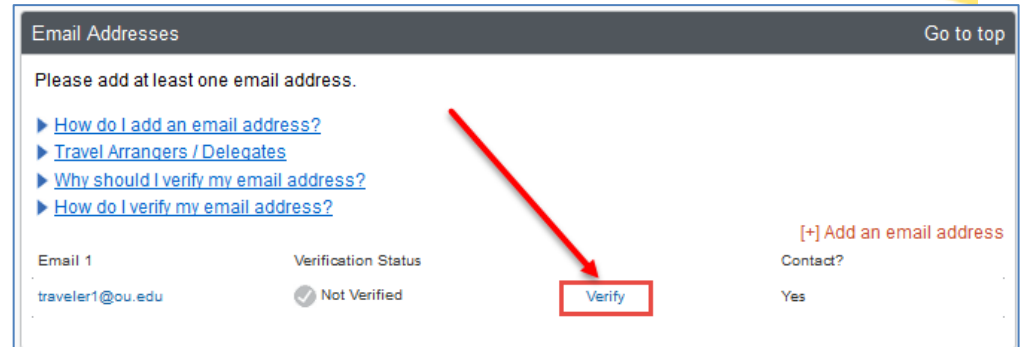
1. Click the **Verify** link.
2. A verification message will be sent to your OU email account.
3. Copy the code from the email message into the **Enter Code** box next to the email address.
4. Click **OK** to submit the code and complete verification.

Step 4: Emergency Contact - Optional

Although this section is not required, we encourage you to enter an emergency contact person.

Step 5: Frequent-Traveler Programs - Optional

As noted in this section, The Oklahoma State Travel Reimbursement Act has restrictions regarding the use of frequent travel miles. Although these restrictions exist, there are some added benefits to an employee if they belong to a Frequent Traveler Program and we encourage you to update your profile to include these programs.





Section 3: Update Your Profile *(continued)*

Step 6: Assistants and Travel Arrangers - Optional

This security is used for travel booking only. You can assign an employee as an assistant or travel arranger. They can act on behalf of you, the traveler, or they can be granted view only access to the traveler's history and upcoming trips. Assistants and arrangers can view your profile. Birthdate and credit card numbers are masked in your profile.

1. Click [+ Add an Assistant](#) located to the right of the section.
2. In the **Assistant** search box, type in the last name then first name of the person you wish to add as an assistant or travel arranger.
3. Select the appropriate name.
4. Check the box **Can book travel for me**.
5. If you do not check this box, your assistant will only be able to view your travel.
6. Click **Save**.

Within the profile section, a user can self-assign the role Book travel for any user (Self-assign). Based on the screen shot to the right, Susan has self-assigned the role to book travel for Cheryl. Once the **Start Session** button is clicked, both Susan and Cheryl will receive an email from Concur (travel@concursolutions.com) stating that a travel assistant has been assigned. If the Traveler did not wish anyone to be able to self-assign this role, they have the option to check the box **Refuse Self Assigning Assistants** located in the Assistants and Travel Arrangers section. If Cheryl did not wish Susan to have the role, Cheryl can click on the trash can icon to remove Susan as an assistant.

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

Profile

Susan S Strout

[Profile Settings](#) | [Sign Out](#)

Acting as other user ?

Act on behalf of another user

Act as user in assigned group (Proxy)

Book travel for any user (Self-assign)

Cancel
Start Session

Assistants and Travel Arrangers
Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers [+] Add an Assistant

Strout, Susan S.	Can book travel? <input checked="" type="checkbox"/>	
Dickerson, Alisa A.	Can book travel? <input checked="" type="checkbox"/>	



Section 3: Update Your Profile *(continued)*

Step 7: Credit Cards - Required

Once you receive your university travel card, you will need to update this section of your profile.

Update your Request Information / Expense Information

1. At the top of the [Concur](#) page, click [Profile](#) then [Profile Settings](#).
2. On the left side of the page, under [Request Settings](#) or [Expense Settings](#) click on [Request Information](#) or [Expense Information](#).
3. Once updates are complete, click [Save](#).

Note: The **Request Information** and the **Expense Information** sections are identical. If you make changes to one section, the other section will automatically be updated.

Step 8: License Plate Number – Required for Mileage

Update the [License Plate Number](#) field. Though this field is not required in Concur, your license plate number is required when processing an **Expense Report** that includes mileage.

The **Department** and **Traveler Type** have been populated from Payroll and Employee Services. These values are based on your appointment in PES. The **Department** and the **Traveler Type** can be changed when processing a **Request** or an **Expense Report**.



Section 3: Update Your Profile *(continued)*

Update your Request Delegates / Expense Delegates

1. At the top of the [Concur](#) page, click Profile, then [Profile Settings](#).
2. On the left side of the page, under [Request Settings](#) or [Expense Settings](#), click on [Request Delegates](#) or [Expense Delegates](#).
3. Once updates are complete, click [Save](#).

Step 9: Request Delegates/Expense Delegates

This security is for Request & Expense functions only. Delegates are employees who are allowed to perform work on behalf of other employees. When you designate someone to be a delegate on your behalf, you determine what permissions they need. Delegates may have the ability to:

- Upload, email, attach and review receipts
- Receive status change emails
- Approve or preview for approver
- Receive approval emails

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	FORTHMAN, JULIE jforthman@ou.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 10/16/2015 10/23/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Patrick, Cheryl cpatrick@ou.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Delegates can prepare, but not submit, a request or an expense report on behalf of the traveler.

Note: The **Request Delegates** and the **Expense Delegates** sections are identical.

If you make changes to one section the other section will automatically be updated.



Section 3: Update Your Profile *(continued)*

Step 9: Request Delegates/Expense Delegates *(continued)*

1. On the [Expense Delegates](#) page, click [Add](#).
2. In the [Search by employee name, email address, employee id or logon id](#) field, type in the last name then first name of the person you wish to add as a delegate.
3. From the list of matches, select the appropriate person.
4. Select the permissions needed for each delegate.
5. Click [Save](#).

Change Password

1. At the top of the [Concur](#) page, click [Profile](#) then [Profile Settings](#).
2. On the left side of the page, under [Other Settings](#), click on [Change Password](#).
3. Once updates are complete, click [Save](#).

Step 10: Change Your Password

1. In the [Old Password](#) field, enter your current password.
2. In the [New Password](#) field, enter your new password.
3. In the [Re-enter New Password](#) field, enter your new password.
4. In the [Password Hint](#) field, enter a hint that will be emailed to you when you forget your password.
5. Click [Submit](#).

Change Password

A password must be at least 6 characters. It can contain numbers (0-9), upper and lower case characters (A-Z, a-z), and symbols (such as ^%*#@#). It cannot contain spaces. *All fields are required.*

Note: Passwords are case sensitive.

i This will change your password for all Concur products.

Old Password	New Password	Re-enter New Password
<input type="text"/>	<input type="text"/>	<input type="text"/>

Password Hint (we will email this to you if you forget your password)

[Submit](#) [Cancel](#)