

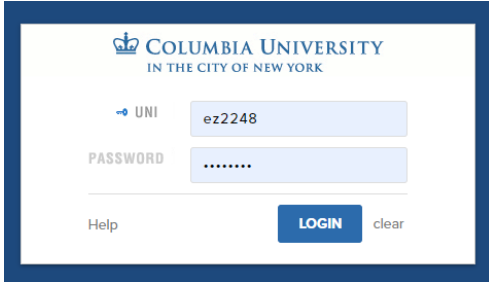
Your Concur Profile stores personal information used for creating expense reports and booking travel. Upon your initial log in to Concur, you should verify and update your Profile. You can update your personal information, departmental information, default ChartFields, and email addresses. In addition, setup travel preferences for air, hotel, or car rental, TSA information, and credit cards. You can name Delegates to prepare Requests and Expense Reports or book travel on your behalf.

### Table of Contents

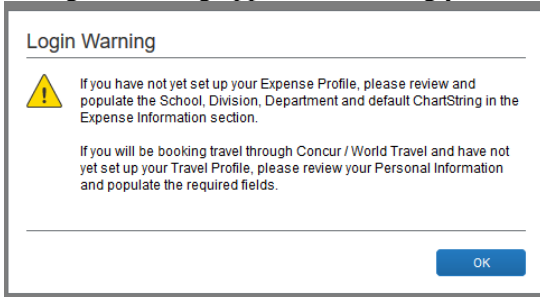
Logging in to Concur and Accessing Your Profile Settings .....	2
Updating Required Information .....	3
Confirming Your Name .....	3
Confirming Company Information .....	3
Home Address.....	4
Contact Information .....	4
Emergency Contact .....	4
TSA Secure Flight.....	5
Other Information .....	5
Work Address .....	5
Email Addresses.....	5
Travel Settings .....	6
Travel Preferences .....	6
Frequent Traveler Programs.....	7
International Travel: Passports and Visas .....	8
Credit Cards .....	9
Request and Expense Settings.....	10
Request/Expense Information .....	10
Delegates.....	11
Favorite Attendees .....	12
Request Preferences .....	13
Expense Preferences .....	13
Other Settings.....	14
E-Receipt Activation.....	14
System Settings .....	15
Connected Apps .....	15
Concur Connect .....	15
Getting Help.....	15

### Logging in to Concur and Accessing Your Profile Settings

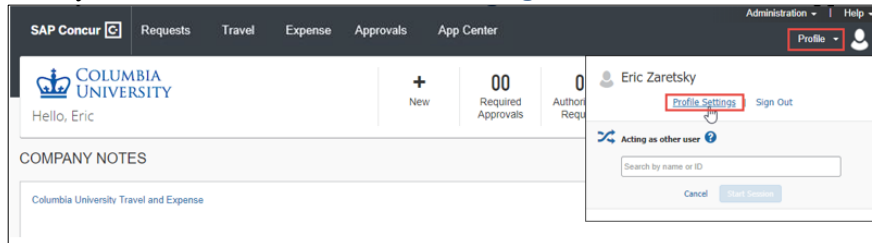
1. Access Concur from the Columbia Travel and Expense Portal.



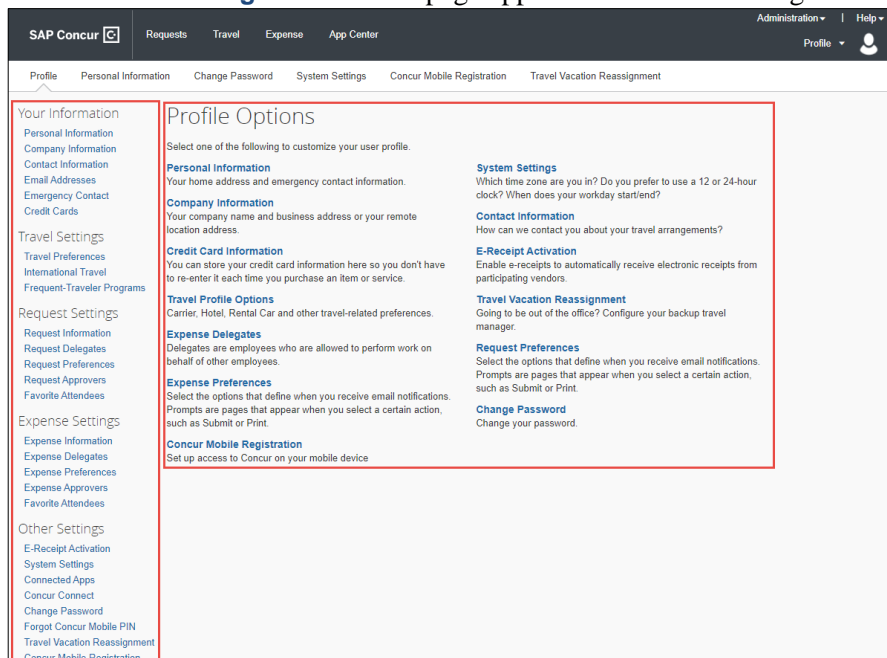
A Login Warning appears reminding you to review and update your Profile settings.



2. Enter your **UNI** and **Password** and click **Login**. Your Concur dashboard appears.

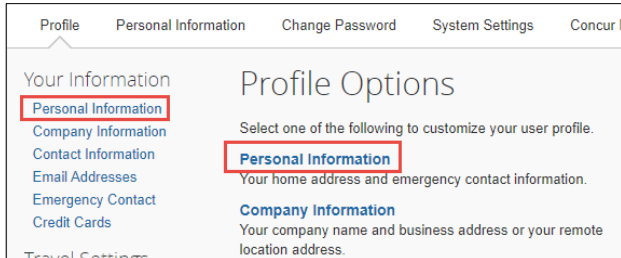


3. Click **Profile** on the top right of your screen.
4. Click **Profile Settings**. The Profile page appears with links to navigate to Profile Settings.



### Updating Required Information

You will find the most common profile tasks on the **Profile Options** page. You can also use the menus on the left to select a setting to update. The first time you update your Concur Profile, you must ensure the following required pieces of information are complete: Your **Name** (including Middle and Suffix), **Company Information**, **Home Address**, **Contact Information**, **Emergency Contact** and **TSA Secure Flight**. You cannot click Save until all required fields are complete.



Click the **Personal Information** link from the left menu or the Profile Options. The Your Information page appears. You can scroll to sections for Company Information, Home Address, Email Address, Contact Information, Emergency Contact and TSA Secure Flight on this page. These are intermingled with Travel Preferences and other optional sections. After making updates, you can click **Save** anywhere on the page.

### Confirming Your Name

Your name appears as it would in the PAC system. Be sure that it matches with how your name appears on your travel documents such as your driver's license or passport. If there is a discrepancy, speak with your Departmental HR representative regarding the process for updating PAC.

My Profile - Personal Information

Jump To: Personal Information

**Please Note:** to ensure your travel information is entered into each reservation successfully, your profile must have all fields noted as [Required]  
\*Letters and numbers only

**\*No hyphens or special characters including the following: ~ ! @ # \$ % ^ & ; \* ( ) \_ + = -**

**\*Must use 2 letter state codes for U.S. states ("OH" for Ohio)**

**\*The name associated with your airline frequent traveler accounts must match the name in your Concur profile**

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

**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	Nickname	Last Name	Suffix
	William	ADMIN	WTIADM	Never	

**Middle Name** is a required field. Be careful to enter your middle name, an initial, or select **No Middle Name** to match how it appears on your travel document. If you need to change it after entering and saving for the first time, you must contact the Finance Service Center.

### Confirming Company Information

Company Information

Employee ID  
10214792

Manager  
Katherine Sheeran

Employee Position/Title

CU BTAACCESS  
CU BTA

DEPARTMENT  
Finance Human Resources-1403102

DIVISION  
FIN Administration-14AD00X

SCHOOL  
FIN Finance-140000X

Sub-Division  
FHR Finance Human Resources-140300X

USER TYPE  
Officers of Administration

Your **Company Information** will automatically be populated. The name of your **Manager** will appear if they are in PAC. If there is a discrepancy, speak with your Departmental HR representative.

### Home Address

Scroll down to the section for **Home Address**.

The screenshot shows the 'Home Address' form. It has a title bar with 'Home Address' on the left and 'Go to top' on the right. The form contains the following fields: 'Street[Required]' (text input), 'City[Required]' (text input), 'State/Province' (text input), 'Postal Code[Required]' (text input), and 'Country/Region[Required]' (dropdown menu). A 'Save' button is located at the bottom center of the form.

1. Complete the **Street**, **City**, and **Postal Code** fields.
2. Select the **Country/Region** from the dropdown menu.

### Contact Information

The screenshot shows the 'Contact Information' form. It has a title bar with 'Contact Information' on the left and 'Go to top' on the right. The form contains the following fields: 'Work Phone[Required\*\*]' (text input), 'Work Extension' (text input), 'Work Fax' (text input), '2nd Work Phone/Remote Office' (text input), 'Home Phone[Required]' (text input), 'Pager' (text input), 'Other Phone' (text input), 'Mobile Phone Country/Region' (dropdown menu), and 'Mobile Phone[Required]' (text input). A 'Save' button is located at the bottom center of the form.

1. Complete the **Work Phone**, **Home Phone**, and **Mobile Phone** fields. Select your **Mobile Phone Country/Region** from the dropdown when entering your mobile phone number.
2. Add any other contact numbers, as desired

### Emergency Contact

Scroll down to the section for **Emergency Contact**.

The screenshot shows the 'Emergency Contact' form. It has a title bar with 'Emergency Contact' on the left and 'Go to top' on the right. The form contains the following fields: 'Name[Required]' (text input), 'Relationship' (dropdown menu), 'Street' (text input), 'City' (text input), 'State/Province' (text input), 'Postal Code' (text input), 'Country/Region' (dropdown menu), 'Phone[Required]' (text input), and 'Alternate Phone' (text input). There is also a checkbox labeled 'Address same as employee'. A 'Save' button is located at the bottom center of the form.

1. Enter the **Name** of your Emergency Contact. Optionally, you can enter your Emergency Contact's **Relationship**.
2. You can complete the **Street**, **City**, **Postal Code**, and **Country/Region** fields **OR** you can select the **Address same as employee** if your emergency contact lives at the same address as you.
3. Complete the required **Phone** field.

### TSA Secure Flight

Scroll down to the section for **TSA Secure Flight**.

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

1. Select the option for **Gender**.
2. Enter your **Date of Birth**.
3. Optionally, you can enter a **DHS Redress No** (to help eliminate watch list misidentification) and/or your **TSA Pre** number for expedited security screening.

After you have completed all required fields, click **Save** anywhere on the page.

### Other Information

#### Work Address

The **Work Address** section is optional but recommended to make updating other Profile Settings, such as Credit Cards, easier. In addition, it is also recommended if you anticipate needing to be reimbursed for Personal Car Mileage.

Work Address

Company Name  Assigned Location

Please choose a company location.

Street   Address same as assigned location

City  State/Province

Postal Code  Country/Region

United States of America

#### Email Addresses

You can email expense receipt attachments to [receipts@concur.com](mailto:receipts@concur.com), making them available to import into your Expense Reports. You must list any email address, including personal addresses, that you will use for this purpose into this section so that it is recognized by Concur. This would include the email of Expense Delegates who prepare Expense Reports on your behalf (see the section on Delegates). Refer to the FAQ in the section for more details.

If you have multiple Columbia email addresses, such as *firstname.lastname@columbia.edu*, *uni@adcu.columbia.edu*, *uni@cumc.columbia.edu*, etc., it is recommended that you add all variations.

Email Addresses

Please add at least one email address.

[How do I add an email address?](#)  
[Travel Arrangers / Delegates](#)  
[Why should I verify my email address?](#)  
[How do I verify my email address?](#)

Email Address	Verify	Contact?	Actions
Email 1 e22248@columbia.edu	<input type="checkbox"/> Not Verified	<input type="checkbox"/> Yes	<input type="button" value="Verify"/>

1. Click the **Add an email address** link.
2. Enter your **Email Address**.
3. Click **OK**.
4. Click **Verify**. A verification email with a Verification Code is sent to the address. If you do not see it in your inbox, check your Junk/Spam folder

Verify

Check email for code

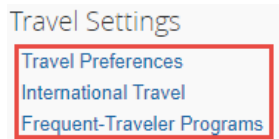
Enter Code

5. Copy the Verification Code from the email and paste into the **Enter Code** field and click **OK**.

### Travel Settings

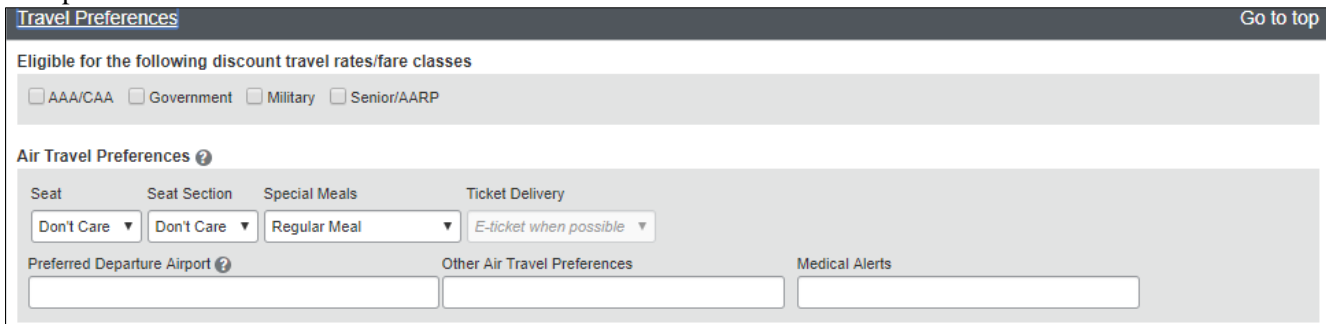
The Travel Settings section allows you to save your preferred travel settings. When booking travel through Concur, your search results will correspond to any saved travel preferences. Add your Frequent Traveler or Advantage Programs to be applied to the associated flights, hotels or car rentals you book. You can also enter your Passport information and International Visas. In addition, you can add your personal credit card or Corporate Credit Card information for making hotel reservations and booking rental cars through Concur Travel.

**Note:** You can book Air or Rail tickets in Concur Travel using the Columbia Air/Rail Central Pay Account feature without the need to use a credit card.

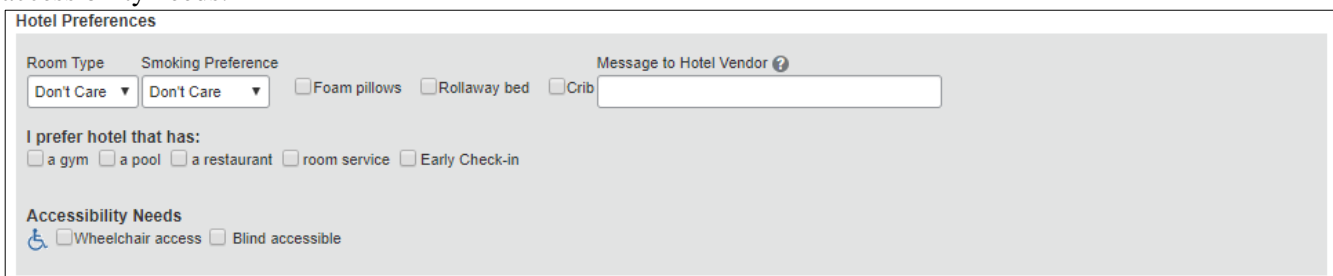


### Travel Preferences

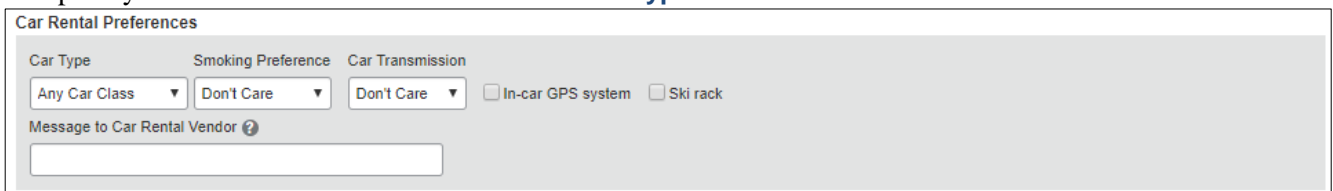
1. Select any **discount travel rates/fare class** for which you are eligible such as Military or Senior/AARP.
2. Complete your **Air Travel Preferences** such as **Seat**, **Special Meals**, and **Preferred Departure Airport**, among other preferences.



2. Complete your **Hotel Preferences** such as **Room Type**, **Smoking Preference** and other hotel amenities and accessibility needs.



3. Complete your **Rental Car Preferences** such as **Car Type** and other car features and amenities.



### Frequent Traveler Programs

Enter your **Frequent Traveler Programs** for Air/Rail, Hotels or Rental Cars.

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs + Add a Program

No programs defined

**My travel network, all your reward programs connected in one place**

By connecting your reward programs, if you book with participating providers, you'll receive your negotiated rates and amenities, get e-receipts, and your travel plans any time on any device, using Concur or Triplt.

Important terms and conditions apply.

Concur must share information with travel partners as part of connecting your accounts. Learn more about how your information is shared and e-receipts.

By clicking "I Agree" below, you agree to the terms above and acknowledge that you have reviewed the information on data sharing.

1. Click **Add a Program**. The Add Travel Programs window appears.

### Add Travel Programs

**i** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

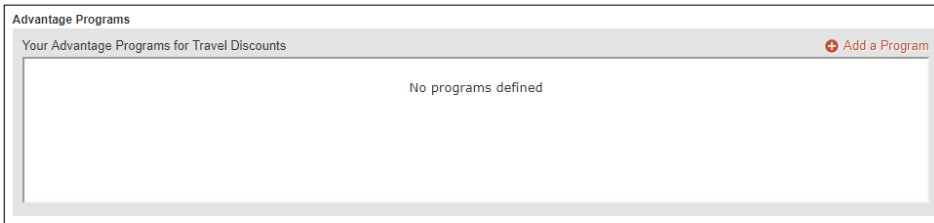
The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel), then select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.)

1	<input type="radio"/> Air/Rail Carrier	<input type="radio"/> Hotel	<input type="radio"/> Car Rental Company
2	American Airlines	Marriott International (EM)	Hertz
3	123456	654321	
4	Select a carrier	Select a carrier	Select a carrier
5	Select a carrier	Select a carrier	Select a carrier

Make default for all oneworld bookings

2. Select the icon for **Airline**, **Car Rental**, or **Hotel**.
3. Select the **Air/Rail Carrier**, **Hotel**, or **Car Rental Company** based on the icon you selected.
4. Enter the **Frequent Traveler/Driver/Guest Number** *exactly* as it appears on your membership card. Refer to the blue notes section for more information.
5. Repeat steps 2 through 4 for each Frequent Traveler Program you want to add.
6. Click **Save**.
7. Click **I Agree** to the Terms and Conditions

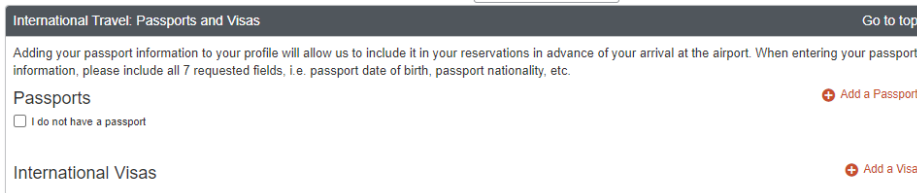
You can also update the **Advantage Programs** section. The Advantage Programs are discounts that are provided by vendors. For example, if you were given a 10% Amtrak discount, you can enter it under the Advantage Programs. You may only see one provider when adding to Advantage Programs because this may be the only provider under Columbia's Travel configuration.



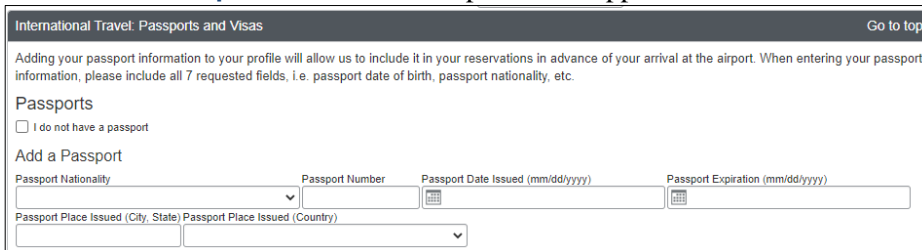
### International Travel: Passports and Visas

Add your **Passports and Visas** information to have it included in your travel reservations to make international travel easier. If you add your passport information, make sure to populate all the fields.

1. Scroll down to the **International Travel: Passport and Visas** section.

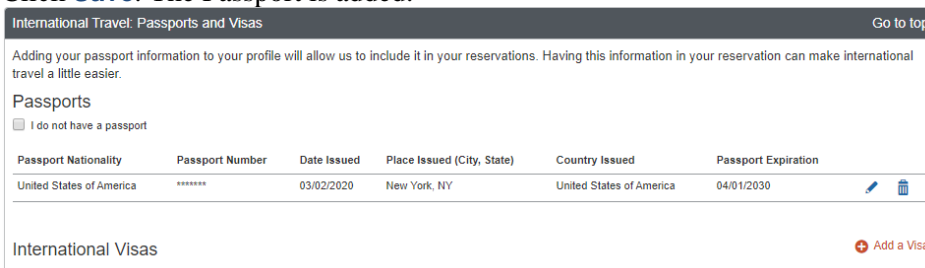


2. Click **Add a Passport**. The Add a Passport fields appear.

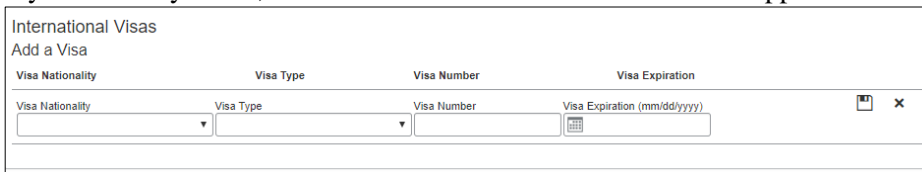


3. You must enter information for all fields, **Passport Nationality, Passport Number, Passport Date Issued, Passport Expiration, Passport Place Issued (City, State)** and **Passport Place Issued (Country)**, in order to receive travel alerts.

4. Click **Save**. The Passport is added.



5. If you have any Visas, click **Add a Visa**. The Add a Visa fields appear.



6. Enter the Visa information.

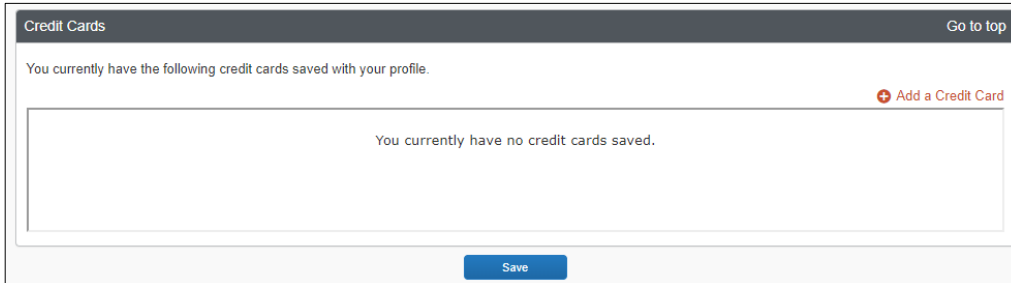
7. Click **Save**. You can add additional Visas, if needed.



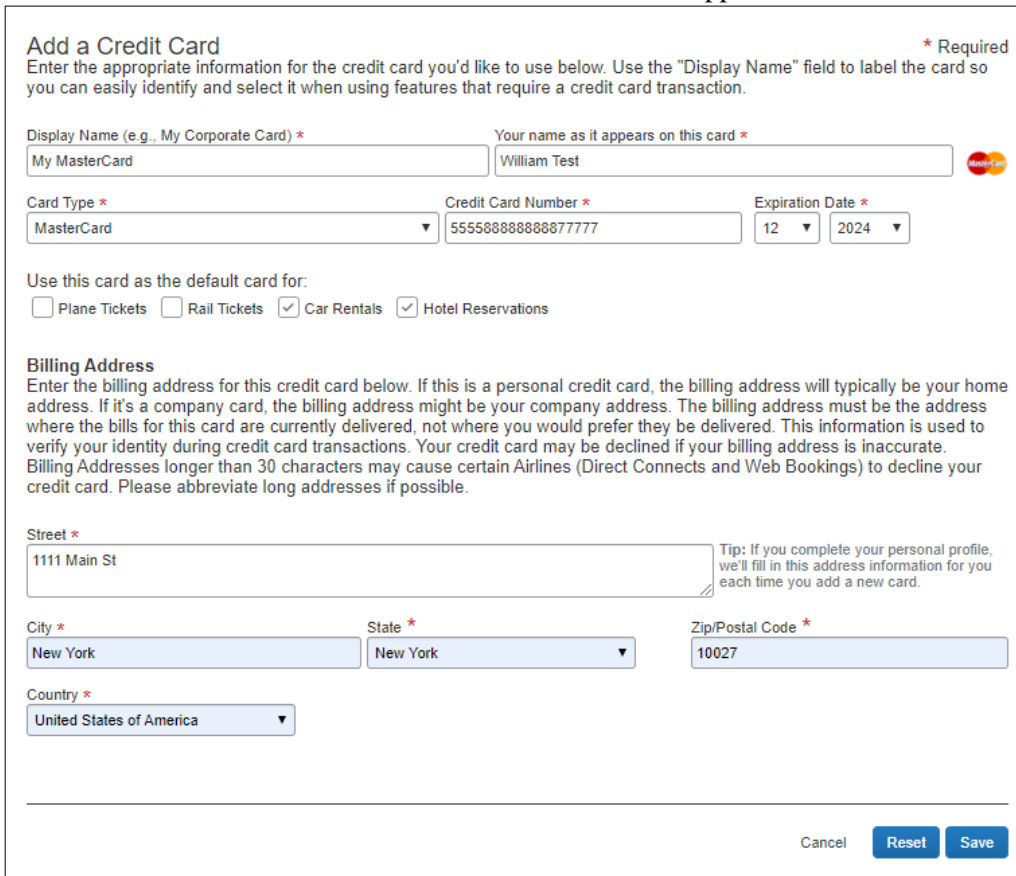
### Credit Cards

You can add personal credit cards or, if eligible, your Columbia University Corporate Card as forms of payment when booking travel. You can book Air or Rail tickets in Concur Travel using the *Columbia Air/Rail Central Pay Account* feature without having to use a credit card. In addition, if you decide to indicate a different credit card when making a travel purchase, that card is automatically added to your profile.

1. Scroll down to the **Credit Cards** section.



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



3. Enter a **Display Name** for the card you are adding which will appear as an option when booking travel.
4. Enter **Your name as it appears on your card**, select the **Card Type**, **Credit Card Number** and **Expiration Date**.
5. Select the **Use this card as the default for** making purchases for Air, Rail, Car Rentals or Hotel Reservations.
6. If you saved your address in the Personal Information section of your Profile, it appears in the **Billing Address**. Edit or enter a new address as needed.
7. Click **Save**. Repeat steps 2 through 7 to add additional credit cards.

### Request and Expense Settings

**Request and Expense Settings** allow you to setup preferences and defaults for when you prepare and submit Pre-Trip Requests, Cash Advance Requests or Expense Reports. Settings for Request/Expense Information, Request/Expense Delegates and Favorite Attendees are exactly the same and updating these settings can be accomplished in either place as the information is identical.

Request Settings	Expense Settings
<a href="#">Request Information</a>	<a href="#">Expense Information</a>
<a href="#">Request Delegates</a>	<a href="#">Expense Delegates</a>
<a href="#">Request Preferences</a>	<a href="#">Expense Preferences</a>
<a href="#">Request Approvers</a>	<a href="#">Expense Approvers</a>
<a href="#">Favorite Attendees</a>	<a href="#">Favorite Attendees</a>

Rather than scrolling through a single page, each setting must be selected in order to view and edit.

### Request/Expense Information

Click **Request Information** or the **Expense Information** link to display the form.

The screenshot shows the 'Request Information' form with several fields. A red box highlights the 'Admin Department' field, which is set to '(1404202) FIN Finance Info S'. Another red box highlights a group of fields: 'GL BU' (1), 'Department' (2), 'PC Business Unit' (3), and 'Project' (4). A third red box highlights the 'Activity' field (5). The form also includes fields for 'Reimbursement Currency', 'User Type', 'User Type Sub-category', 'School', 'Division', 'Sub-Division', 'Request Authorization', 'Initiative', 'Segment', and 'Site'.

The Request / Expense Information is pre-populated from PAC with your School, Division, Sub-Division and Admin Department. These values will default to new Requests / Report and have an impact on workflow routing. The Division will drive workflow routing to Senior Business Officers when applicable.

The **Admin Department** will drive workflow routing to the Initial Reviewer when applicable. It is possible that your Level 8 Admin Department may not be populated or is incorrect. Ask your School or Department Senior Business Officer for guidance on how to update PAC.

Enter the **ChartFields**. If you enter codes in the ChartFields rather than text, click the field dropdown and select **Code**.

The screenshot shows a dropdown menu for the 'Project' field. The dropdown is open, showing a search bar with the text 'Type to search by:'. Below the search bar are two radio buttons: 'Text' (selected) and 'Code'. A red box highlights the 'Code' radio button. Below the radio buttons is a list of search results, with 'GI Funding (UR004672)' visible.

These will also populate as the default in new Requests / Reports. The **Department (2)** ChartField (and Dollar amount) will drive workflow routing to a Financial Approver.

If you leave any ChartFields blank, you will need to complete those ChartFields on your Requests or Expense Reports.

### Delegates

You can name colleagues to act on your behalf to prepare Requests, Expense Reports, or book Travel. **Delegates** can create the reports and notify you when complete but they cannot submit expense reports on your behalf. You will receive notifications when the report is ready to review and submit. If you are an Approver, you can name a colleague to approve Requests or Reports on your behalf. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate. Please note that Delegates cannot use the Concur Mobile App when acting on your behalf and must use the Concur Desktop Application.

Click the **Request Delegates** or the **Expense Information** link to display the form.

1. Click **Add**.
2. Type your **Search** using last name, UNI, email, etc. A list of matches appears.

3. Select the desired match or click the **Add** button next to the search field if your selection is not added.
4. Select the appropriate **checkboxes** to assign the permissions you wish to give the Delegate:
  - **Can Prepare** -The Delegate may prepare Expense Reports and Requests on your behalf. You will still be required to submit the Report for approval
  - **Can Book Travel** – The Delegate may reserve and book air/rail, hotels or rental cars on your behalf. If you select Can Book Travel, Can Prepare and Can View Receipts will be automatically selected. As a result, a Travel Delegate is also assigned as an Expense Preparer Delegate.
  - **Can Submit Reports** – The Preparer Delegate is able to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate cannot submit the Expense Report into workflow for approval. Two things will happen: 1) your Delegate will see any audit alerts that may prompt them to check for accuracy and completeness; 2) you will receive an email notification that your Delegate has created an Expense Report which should be ready for review and submission. You will need to open the Report created on your behalf and click Submit Report to enter it into workflow for approval. If you do not authorize your Delegate to Submit Reports, they will not see the Submit Report button. Instead, the Delegate will see the Ready For Review button once they have finished preparing your Expense Report. When clicked, an email will be sent alerting you that your Expense Report is ready for review and the report status will change to Ready for Review. You must review the Report for accuracy and completeness prior to submitting it into workflow for approval.
  - **Can Submit Requests** – The Preparer Delegate is able to click Submit Request once they have finished preparing your Request. This works the same as Can Submit Reports. See details above.
  - **Can View Receipts** - Defaulted when selecting Can Prepare. This allows the Delegate to view your receipt store, receipts images, etc.
  - **Can Use Reporting** - If you have any reporting rights (typically restricted) you may assign that reporting license to 2 individuals
  - **Receives Emails** – The Delegate receives all the same Concur emails as you
  - **Can Approve** – If you are an Approver, the Delegate may approve Reports and Requests on your behalf. The Delegate must also be setup in Concur as an Approver.

- **Can Approve Temporary** – Indicate the date range you are giving this Delegate to approve reports and requests on your behalf
- **Can Preview for Approver** - The Delegate will be able to review / validate all information that the approver sees, but cannot approve, when they are acting as that Approver
- **Receives Approval Emails** – The Delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

Delegates are employees who are allowed to perform work on behalf of other employees.  
You may assign a temporary approver for a maximum of 365 days.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
Sheeran, Kate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Click **Save**.

### Favorite Attendees

When preparing an Expense Report, the names and details of attendees are required for several Expense Types, such as Business Meals and Entertainment. You can save Favorite Attendees and Attendee Groups if you anticipate creating multiple Reports with the same attendees (i.e., recurring team meetings or events.)

Click the **Favorite Attendees** link to add or edit Attendees.

Favorite Attendees

Attendees | Attendee Groups

Find every attendee where Last Name Begins With zaretsky Go Advanced Search

New Attendee Edit Delete

Attendee Name	Attendee Title	Institution/Company	Attendee Type
No Attendees Found			

### Adding a Favorite Attendee

1. Click **New Attendee**. The Add Attendee form appears.

ADD ATTENDEE

Attendee Type Last Name First Name

CU Administration

2. Select the **Attendee Type** from the dropdown menu.

Attendee Type

CU Administration

CU Administration

CU Alumni

CU Donor

CU Faculty

CU Recruit

CU Student

Group Event - 10+ Attendees

Outside Party

Spouse/Significant Other/Dependent

3. Enter the **Last Name** and **First Name**.

4. Click **Save**.

### Adding an Attendee Group

1. Click the **Attendee Groups** tab.

2. Click **Add New**. The Group form appears displaying the Favorite Attendees list.

2. Type the **Group Name** and select the desired **Attendee Names** to be in the group.

4. Click **Save Group**.

### Request Preferences

You can turn on or off email alerts and prompts associated with Requests and Expense Reports.

Click the **Request Preference** link to display the settings.

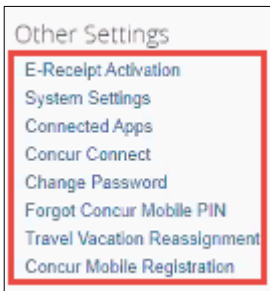
### Expense Preferences

Click the **Expense Preference** link to display the settings.

Select the desired options and click **Save**.

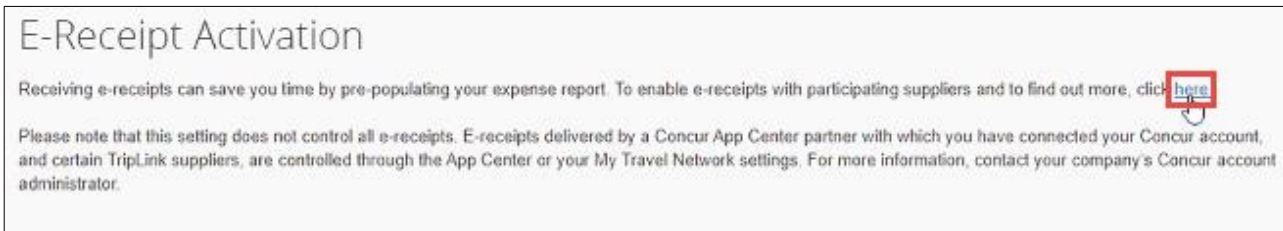
### Other Settings

Other Settings include preferences for E-Receipts, language, calendar and number format, Apps from various vendors that you can connect to Concur, and Mobile PIN resets.

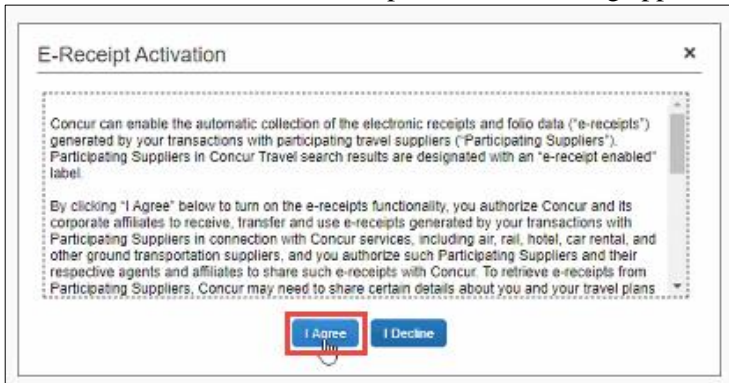


### E-Receipt Activation

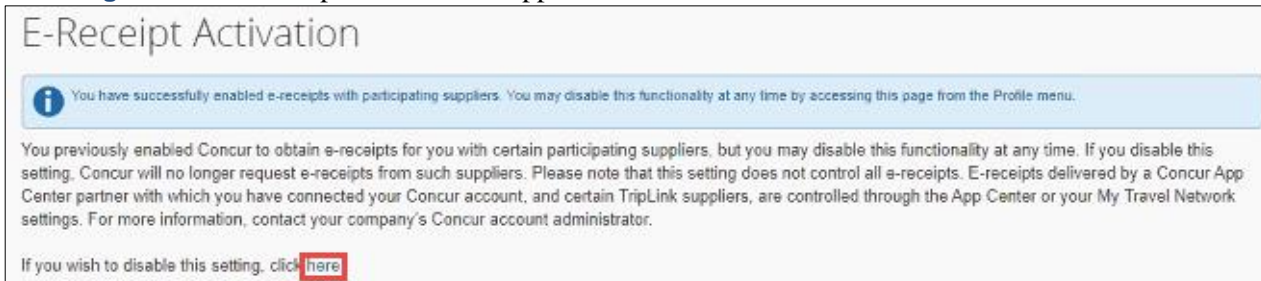
By enabling E-Receipts, you can pre-populate an Expense Report with E-Receipts from participating air, car, and hotel suppliers when you book your travel using Concur.



1. Click the [here](#) link. The E-Receipt Activation dialog appears.



2. Click [I agree](#). The E-Receipt confirmation appears.



You can disable the E-Receipts by click the [Here](#) link again.

### System Settings

**System Settings**

**Regional Settings and Language**

Default Language: English (US) ▼

Number Format: 1,000.00 ▼

Placement of Currency Symbol: Before the amount ▼

Negative Number Format: -100 ▼

Negative Currency Format: -100 ▼

mile/km: mile ▼

Date Format: mm/dd/yyyy ▼

Time Format: h:mm AM/PM ▼

Hour/Minute Separator: : ▼ 03/05/2020 03:18 pm

Time zone (local time): (UTC-05:00) Eastern Time (US & Canada) ▼

**Calendar Settings**

Start week on: Sunday ▼

Start Day View At: 08:00 am ▼

End Day View At: 08:00 pm ▼

Default View: month ▼

**Other Preferences**

Rows per page: 25 ▼

**Other Settings**

Alternative UI Mode for Expense, Invoice, and Request ?

Save Reset Cancel

1. Select the desired **Regional Setting and Language**, **Calendar Settings** or **Other Preferences** settings.
2. Select when to receive **Email Notifications**.
2. Click **Save**.

### Connected Apps

The Connected Apps page displays the TripIt app that you can link to Concur to help manage your trips

### Concur Connect

Concur Connect displays the apps that are currently linked to Concur account.

### Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>