

## Getting Started with Concur

It's important to update your profile settings when first logging in to [Concur](#)

- ✓ In the drop-down upper-right of the home screen [click Profile](#), then [Profile Settings](#); [Click Personal Information](#)
- ✓ **NOTE: Employee's preferred name in Banner is the default. If booking airfare in Concur, please edit your First, Middle and Last Name to match** your photo identification presented at airport security. This name will display in Concur, as well as on any notifications to approvers, etc. This field is left open for editing.
- ✓ [Work Address](#) choose **Assigned Location** and check box: **Address same as assigned location**
- ✓ [Contact Information](#) enter **your work phone and add your mobile device**. Check box to opt in to safety messaging. Remember to click OK
- ✓ [Email Addresses](#): click **verify**. Open email (may take several minutes to receive), copy code and paste in Concur profile Enter Code field
  - Add and verify any additional email addresses you may use to arrange travel (personal too) to capture all electronic receipts. Forward to [receipts@concur.com](mailto:receipts@concur.com)
- ✓ [TSA Secure Flight](#) requires user to add **gender and birthdate**. Entries must match your legal photo ID.
- ✓ [Review/Assign Delegates](#) by clicking on "Request Delegates" and Add
  - Check boxes for appropriate permissions: Can Prepare and Receives Emails
  - Delegates are the same in both Request and Expense
  - Approvers may delegate approval permissions for a limited time or permanently; check Can Approve and Receives Approval Emails box
  - Remember to click Save after any addition or change
- ✓ [Activate E-Receipts](#): under Other Settings, click E-Receipt Activation on left, click [here](#) and click I Agree. Forward your receipts to [receipts@concur.com](mailto:receipts@concur.com) for easy upload and to make expense information available for travelers and delegates to build reports.
- ✓ [Concur Mobile Registration](#): travelers and approvers should download the Concur mobile app to their phone or tablet. When asked for the company Code use **6EVYP**

### Travelers and Approvers: Download the SAP Concur App to your mobile device

- ✓ Create, review and submit Requests and Expense Reports
  - ✓ Expenselt: take pictures of travel receipts and create expenses to build reports
  - ✓ Review and approve anywhere, anytime
  - ✓ Connect to Apps like Lyft and Uber to auto import business related receipts
  - ✓ Connect to Triplt to associate business trip electronic itineraries and arrangements
- ★ When asked for the company Code use **6EVYP**



## Travel Services

SAP Concur 