

SETTING UP YOUR CONCUR PROFILE

1. **Login to:** Single Sign On (<http://sso.tamu.edu>)
2. **Select:** Concur.
3. **Select:** "Profile" tab.
4. **Select:** "Personal Information" under the "Your Information" header on the left-hand navigation.
5. **Verify:** pre-loaded content is correct. It should match the photo ID you will be using while traveling.
6. **Complete remaining requirements** (indicated by **[required]**), **preferences, and add personal credit cards**

Note: If your department has a travel arranger or you have an assistant who manages your travel for you, you can list this person in this section. Please note this is not the same as a delegate discussed below. **IQSE does NOT have a travel arranger.** Due to the changes brought by CONCUR, there is no longer an Institute CBA and so travelers must now make all their own arrangements using their own personal credit cards.

7. **Under the "Expense Settings" header on the left-hand navigation, Select:** "Expense Delegates" to setup expense delegates (assists with post-travel activities). You may list as many as you want.

For PQE purposes please list Teng Ma as your delegate (and remove others if they are listed in your CONCUR account) so he might be able to prepare (i.e., edit/correct your entries), view (i.e., review), and receive information (i.e., if there are problems) and approval emails (i.e., to know an expense has been paid) related to your expense reports.

To add Mr. Ma as delegates on your account:

- o **Click:** "Add Delegate"
- o **In the "Search by Employee Name" box type:** "tengma" and select "Ma, Teng" from the list of names which appears.
- o **Once selected, the delegate's name will appear in the expense delegates box in your profile. Once Mr. Ma's name appears, then check the following boxes:**
 - Can Prepare
 - Can View Receipts
 - Receive Emails

- Can Approve (not the same as submit; allows to modify expenses)
- Receive Approval Emails
- o **Once boxes are checked, click "Save"** else your delegates will still not have access to your documents in CONCUR.

Expense Reports can only be "submitted" by employees themselves and so an email will be sent to the traveler once the delegate has approved the expense report to let them know it can be submitted.

8. Under the "Expense Settings" header on the left-hand navigation, **Select:** "Expense Preferences" to setup expense preferences (e.g., email options),

Under Section entitled 'Prompt' please check both boxes so that IQSE will know when the traveler has submitted pre-travel authorization requests and expense reports for approval. Otherwise you will need to email tengma@tamu.edu so Mr. Ma will know documents have been submitted for approval.

Additional user settings(e.g., more Email Notifications, Date, Time, Homepage), can be found by selecting "System Settings" under the "Other Settings" header on the left-hand navigation.

Homepage preference is found on the right hand side under "Other Preferences".

9. To add mobile access via apps for iPhones and Android devices, select "Mobile Registration" under the "Other Settings" header on the left-hand navigation.

This will allow you to take pictures of receipts while in travel status and directly upload them into your Concur profile for easier processing of receipts when you go to complete your Expense report following your trip as well as help to ensure maximum reimbursement by avoiding the lost receipt issue (e.g., food receipts).