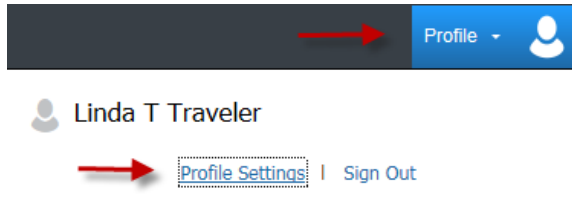


# University of Houston Concur Instructions Getting Started in Concur

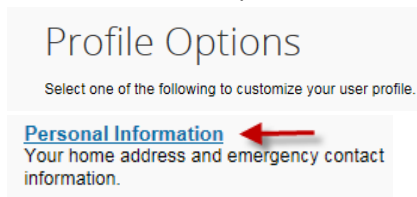
## (1) Review the travel profile information and make necessary updates.

The information in the travel profile will be used to book your travel. In this section, you can also select travel arrangers/assistants to help you with travel arrangements.

- Click on “Profile” and select “Profile Settings”.



- Under the Profile Options, select “Personal Information”.



### Traveler Name

Review your full name. Your legal name should be entered since the name will be used to book air ticket. If a change is needed and the fields are grayed out, contact Accounts Payable Travel (see contact information at the end).

**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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Employee ID

Review your Employee ID. This ID is critical for the Concur system since it will be tied to your Travel Requests, Expense Reports, Cash Advances, and Reimbursements, etc. If the ID needs to be changed, contact Accounts Payable Travel.

**Company Information**

Employee ID	Manager	Employee Position/Title	Org. Unit/Division
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Unit	Department ID	Traveler Type	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

### Contact Information

Enter your phone numbers.

# University of Houston Concur Instructions

## Getting Started in Concur

**Contact Information** [Go to top](#)

Work Phone **[Required\*\*]** 713-743-0000 Work Extension Work Fax

2nd Work Phone/Remote Office Home Phone **[Required\*\*]** 713-743-1111

Pager Other Phone

Mobile Phone

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

### **E-mail Address**

Verify your e-mail address. If your e-mail address is not verified, click on “Verify” and follow the instruction to complete the verification.

**Email Addresses** [Go to top](#)

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?](#)

[+ Add an email address](#)

Email 1	Contact?
<a href="mailto:kmcginn@central.uh.edu">kmcginn@central.uh.edu</a> <input checked="" type="checkbox"/> Not Verified <input type="button" value="Verify"/>	Yes <input type="button" value="Edit"/>

### **TSA Secure Flight Information**

Complete the required information in the TSA Secure Flight section. The information is required for flight reservation.

**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

### **Travel Arrangers/Assistants**

If you want someone else (UH employee) to arrange or assist with travel arrangements, add the person in the “Assistants and Travel Arrangers” section.

Click on “Add an Assistant”

**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

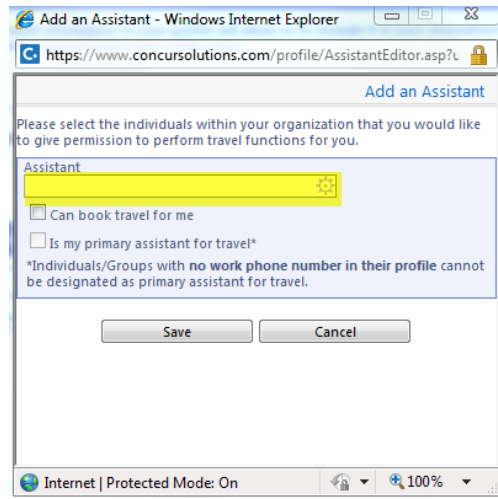
Your Assistants and Travel Arrangers

You currently have no assistants defined.

Type the person’s last name in the field highlighted below. Concur will give you a list of people under their last name. Select one.

Select one of the boxes and place a checkmark. Then click on “Save”.

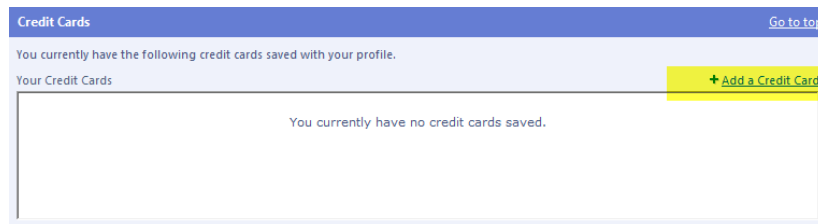
## University of Houston Concur Instructions Getting Started in Concur



Note: This is not a delegation for someone to create a Travel Request or Expense Report on your behalf. You must notify AP Travel if you need a delegate to create a Travel Request or Expense Report.

### **Credit Card(s)**

In the Credit Cards section, click on “Add a Credit Card” and enter the credit card information (optional). After you enter a credit card, most of the credit card number will be hidden. If you enter a credit card here, you don’t have to enter it each time you book travel through Concur. You can select from a list of available credit cards or enter another one.



# University of Houston Concur Instructions

## Getting Started in Concur

**Add a Credit Card**

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction. **All fields are required.**

Display Name (e.g., My Corporate Card)

Card Type  Expiration Date

Use this card as the default card for:

Plane Tickets  Rail Tickets  Car Rentals  Hotel Reservations  Taxi

**Billing Address:** Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address **must** be the address where the bills for this card are **currently** delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. **Your credit card may be declined if your billing address is inaccurate.**

**Note:** Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street

City  State  Zip/Postal Code

Country

Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

After entering the information, click on the "Save" button.

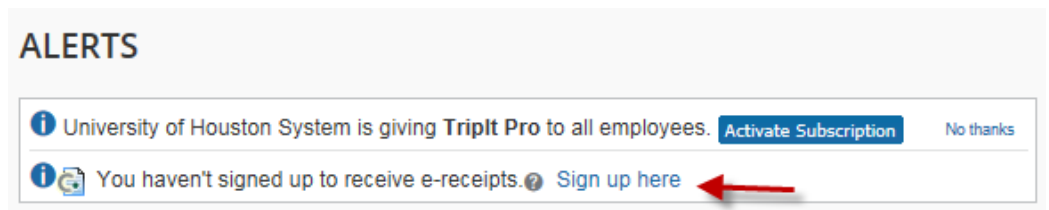
Note: You may complete your travel preferences in this section. The information will be provided to CTP (travel agency) when you are booking your travel.

### (2) Sign up to receive e-receipts (optional).

Many national vendors (e.g., hotel, rental car, etc.) participate in the Concur e-receipt program. When you use your UH Individual Travel Card or personal credit card registered in your personal profile, those vendors that participate in the e-receipt program can automatically send e-receipts to your queue in Concur. If you have an e-receipt, you don't need a paper receipt.

On the Concur main page;

- Click on "Sign up here" for e-receipts.



- Click on "Enable"

# University of Houston Concur Instructions

## Getting Started in Concur

### E-Receipt Activation

Save time on your expense reports. When you enable e-receipt syncing, receipts from participating suppliers will be added to your SAP Concur account and used to pre-populate expenses for you. **Enable**

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator.

- Accept the agreement by clicking on "I Agree".



### E-Receipt Activation ✕

Your SAP Concur solution can enable the automatic collection of the electronic receipts and folio data ("e-receipts") generated by your transactions with participating travel partners.

By enrolling in travel partner integrations, you will enable e-receipts functionality generally within your SAP Concur solution and you authorize SAP Concur and its corporate affiliates to receive, transfer, and use e-receipts generated by your transactions with participating travel partners. This is in connection with SAP Concur services, including air, rail, hotel, car rental, and other ground transportation suppliers, and you authorize such participating travel partners and their respective agents and affiliates to share such e-receipts with your SAP Concur solution. To retrieve e-receipts from participating travel partners, your SAP Concur solution may need to share certain details about you and your travel plans with participating travel partners, which might include your

**I Agree** **I Decline**

- You will get the confirmation indicating that you enabled e-receipts.

 You have enabled e-receipts. Look for the e-receipt enabled icon while booking to identify participating vendors: 

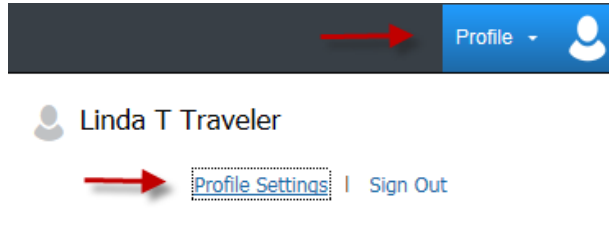
# University of Houston Concur Instructions

## Getting Started in Concur

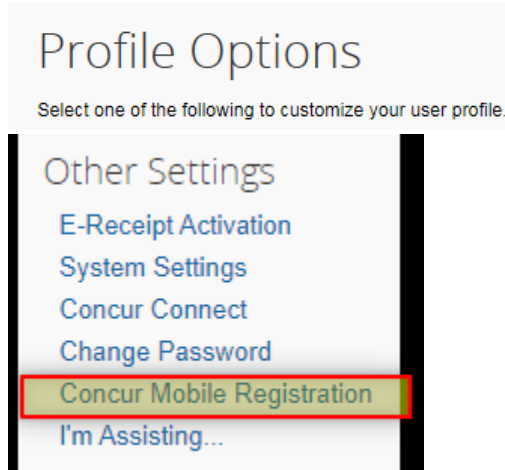
### (3) Download the app for Mobile Registration (optional).

By downloading the Concur Mobil App, you can book travel, review your itinerary, capture the receipt photos and send them to your Concur access, or submit/approve Travel Requests and Expense Reports anytime, anywhere.

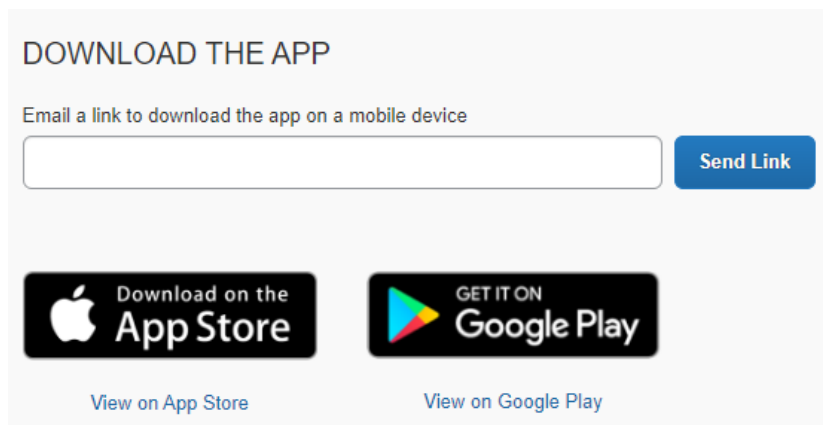
- Click on the Profile and select “Profile setting”.



- Under the Profile Options, select “Mobile Registration”.



- Download the app by selecting an appropriate icon. Or send a link to your device by entering your e-mail address or mobile phone number in the field provided. You will be required to create your mobile PIN.



## University of Houston Concur Instructions Getting Started in Concur

### **(4) Download the free Expenselt app to turn paper receipts into e-receipts (optional)**

Once you download the Concur Mobile App and obtain your mobile PIN, Expenselt will be available for download in Google Play and IOS App Store. Travelers can take a picture of their receipts using IOS and Android mobile device and Expenselt will automatically create the expense entries with itemizations in your Concur access.

### **(5) Use Triplt to create an electronic itinerary – even when you don't book through Concur (optional)**

Triplt “automagically” takes all your trip details and creates one truly helpful master itinerary that's there when and where you need it – on your mobile device, sync'd with your calendar, and online at [tripit.com](http://tripit.com).

- Click on the Triplt Pro icon in Concur
- Download the free app
- TripLink will use your travel confirmation emails to automatically create an itinerary
- Share trip information with colleagues, family and friends

### **UH Accounts Payable Travel Group – Contact Them If You Need Help Updating Your Profile**

Olivia Guo, 713-743-6920, [lguo9@central.uh.edu](mailto:lguo9@central.uh.edu)

Eric Diaz, 713-743-7538, [eodiaz@central.uh.edu](mailto:eodiaz@central.uh.edu)

Quang Ngo, 713-743-9152, [qmngo@central.uh.edu](mailto:qmngo@central.uh.edu)

AP Travel Team [aptravel@uh.edu](mailto:aptravel@uh.edu)