Set up Profile

Situation: Individual will be using Concur for Expense Reimbursements and Travel Bookings

**Step One: Log into Concur**

Option 1 – Direct link: https://idp.pennkey.upenn.edu/idp/profile/SAML2/Unsolicited/SSO?providerId=https%3a%2f%2fwww.concursolutions.com

Option 2 – Go to www.upenn.edu/penntravel Click on Log-in to Concur

Option 3 – Path: Penn Faculty & Staff Page, bottom right under Travel, Concur Travel and Expense

**Step Two: Activate eReceipts**

At the top of page, immediately under the tool bar, look for the eReceipts notice. Proceed to activate. You can say "no" to TripIt to remove it from your screen.

**Step Three: Update Profile**

- Click Profile (top right of screen)
- Click Profile Settings
- Click Personal Information. Verify that your name is how you want it to appear on your airline tickets – matching either your driver’s license or passport exactly
- Proceed down the page, filling in the information. Make sure to include phone numbers and email addresses. These are used by World Travel to contact you if your flight has been cancelled or rebooking is necessary. (You can include an assistant’s email address so that they receive itineraries and other information automatically.)
- Add Frequent Travel Programs to automatically attach your frequency number to any reservations made, eliminating the need to carry your frequency program cards.
- Add TSA Secure Flight Information (required for any air travel)

- If you intend to use Concur on your mobile device to take pictures of receipts:
  - Proceed through the verification process listed under the Email Addresses section
  - Create a pin under the Mobile registration section (left margin, near the bottom of the list)
  - Download the app – if you plan to do Travel Booking or Expense Report creation, submittal or approval using your mobile device
  - Note: Complete step by step directions are available under the Training Materials section of the Penn TEM website

**Step Four: Add Credit Cards (personal)**
If you will want to use your personal credit card to book travel, you can enter your card number and information in the last section of the Profile screen. It is entirely secured, with the number immediately encrypted upon entry.

Note: If you have applied for the Penn Travel Card, it will automatically be added to the system when your first transaction feeds into Concur. You will not have to load it manually in this section.

**Step Five: Assign Assistant or Travel Arranger (optional)**
An assistant can book travel on behalf of another. You can have more than one assistant.
Step Six: Assign Expense Delegate (optional)

An expense delegate has the ability to create expense reports on behalf of another person. The individual must assign that delegate to their account, and authorize the activities that they can perform. You can have more than one delegate.

- In the left hand margin, select Expense Delegates

- Click the Add button

- Use the Search field to find the person you wish to assign as your delegate

- When the name appears, single click on it. Their name will now appear in the box
- Check the boxes that describe the permissions you are giving to the delegate – the activities they can do on your behalf. Left 3 refers to creating expense reports. Right 3 refer to Approving reports on your behalf. Recommended setup: click ‘Can Prepare’, ‘Can Review Receipts’ and ‘Receives Emails’ for the Expense side and ‘Can Approve’ and ‘Receives Approval Emails’ on the Approval side. SAVE.

**Step Six: Banking Information**

Important Note: Banking information in your Concur profile is Read-Only. To identify the account that is listed as the recipient of any expense reimbursements:

1. Select Banking Info in the left margin of your Concur Profile

2. The next screen will display the bank account information, specifically the last four digits of the account. This account will be the checking or savings account that you have selected for direct deposit through your Faculty/Staff or Student Portal at upenn.edu. If you do not have a direct deposit account, the last four digits represent a paycard that has been issued to you.

3. To make any changes to your banking information, visit the Penn Portal (Faculty/Staff or Student) and enter Direct Deposit information. In approximately 4 - 6 days, the information will feed into Concur.