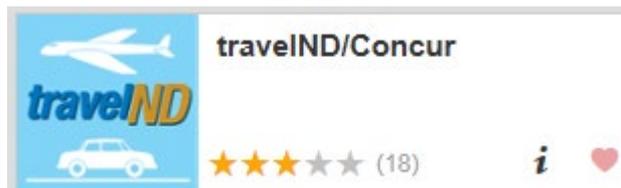


Profile Setup Quick Reference Guide

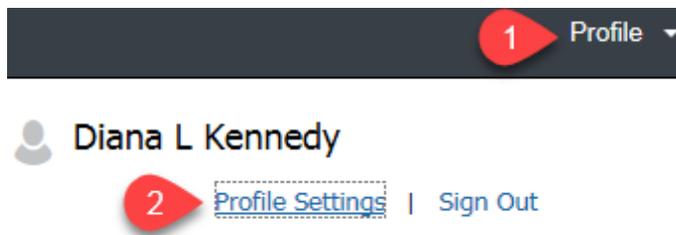
1. Log into Concur

Go to travel.nd.edu and enter your NetID and Password, or Use the *travelND* icon in insideND.



2. Open your Profile

Click **Profile** button in the upper right hand corner to add or edit your information. Click **Profile Settings**.



3. Add or Edit Personal Information

Under the **Profile** menu, **Personal Information**

- Verify **name** as it appears on the govt. issued photo ID that you will be using while traveling. This is the name that will print on your travel reservations.
 - Check the box if you do not have a middle name or initial.
- Update your phone numbers.
- Click on **Travel Preferences** from the menu on the left side of the screen.
- Add passport information & credit card information.
- Click **Save** after adding your personal information.

4. Add an Expense Delegate

Assigning a person as your expense delegate allows them to complete your expense reports and notify you when it is complete so you can submit the report.

- Click on **Expense Delegates** under Expense Settings section on the left
- Click on **Add Delegate**
- **Search** for the user by last name, select and click **Add**
- For the selected user, click on the checkboxes for **Can Prepare, Can View Receipts and Receive Emails**
- Click **Save**.

5. Add a Travel Arranger

Assigning a person as your travel arranger allows them to book airfare, hotels, car rentals on your behalf in travelND.

- Click on **Assistants/Arrangers** under **Travel Settings** on the left side menu
- On the right side of the Assistants/Arranger section, click on **Add an Assistant**
- Search for the user by last name and select from the results
- Click on the checkbox for **Can book travel for me**, click **Save**

Assistant

 Can book travel for me

6. Administering for Another User

To administer for another user as an **Expense Delegate** or **Travel Arranger**, click on your **Profile** button. Select the **Act on behalf of another user** radio button

Profile Settings | Sign Out

Acting as other user ?

1 Act on behalf of another user

7. Administering for Another User – cont.

Click the drop down arrow next to **Choose a User** box to select a user or type in the last name. Click **Start Session**. You can now start that person's expense report or book travel on their behalf.

Choose a user

2

Cancel Start Session

8. Return to your profile

To return to your own session, click on **Done acting for others** under the profile.

1 Done acting for others

9. Change/Update FOP

Assigning a default Fund/Org/Program can be done in your Concur profile.

- Open your profile.



- On the left navigation, click on **Expense Information** option under **Expense Settings**.
- Type in the fund number, wait for the system to find the fund number and select it from the drop down menu results.
- Fill in the org and program numbers
- Click **Save**



Expense Information

Expense Information form fields:

- Reimbursement Currency: US, Dollar
- Activity: [Empty]
- Fund: 2 | 100000
- Organization: 3
- Program: 4
- Company Car?
- Type to search by:
 - Text
 - Code
 - Text (Code)
- Search results: Educational and General (100000)