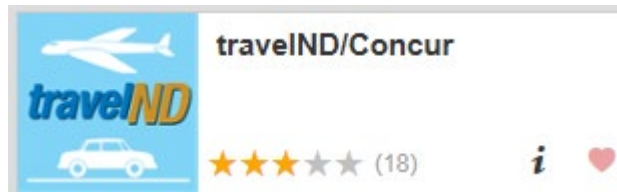


Profile Setup Quick Reference Guide

1. Log into Concur

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

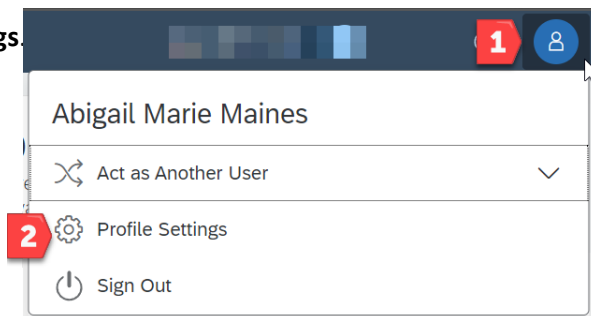


2. Open your Profile

- To view the new theme, be sure your toggle button is on:



- 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.
- Email Address** - add your NetID email address to the email section and verify the address. See step 10 for more details.
- Click **Save** after adding your personal information.

4. Add an Expense Delegate

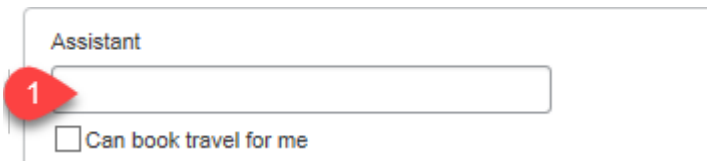
Assigning a person as your expense delegate allows them to complete your expense reports and notify you when it is complete so you can submit the report.

- 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

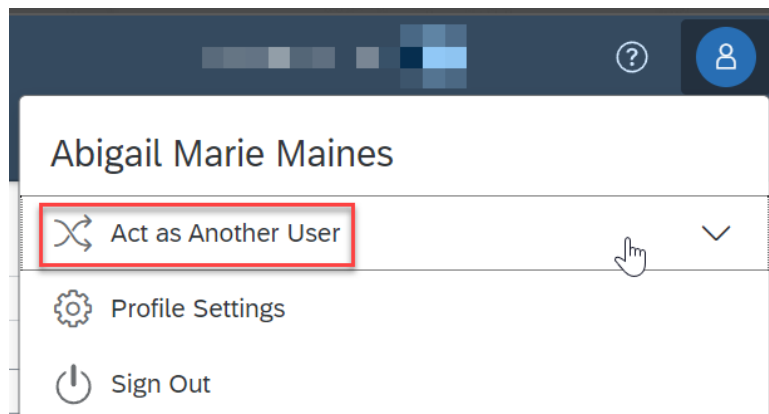
Assigning a person as your travel arranger allows them to book airfare, hotels, car rentals on your behalf in travelND.

- 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**



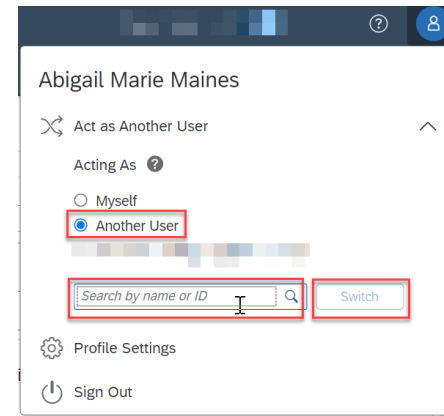
6. Administering for Another User

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



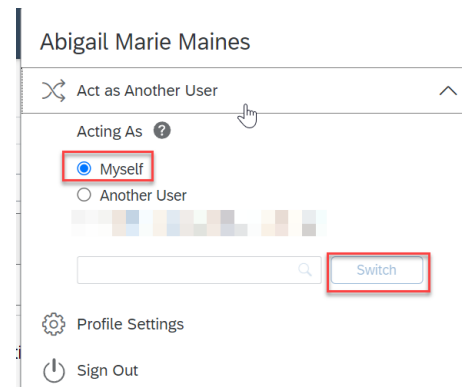
7. Administering for Another User – cont.

Click the radio button next to **Another User** box to select a user or type in the last name. Click **Switch**. You can now start that person's expense report or book travel on their behalf.



8. Return to your profile

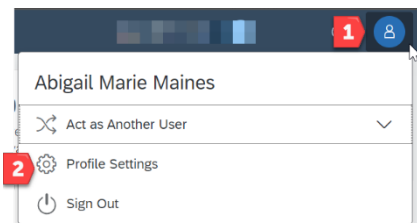
To return to your own session, click the profile icon, choose **Act as Another User** then choose the radio button next to **Myself** then click **Switch**



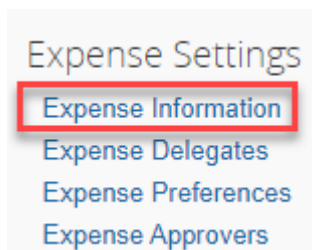
9. Change/Update FOP

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

10. Email Address Details

Why verifying your email address is important:

When you verify your email address, Concur can associate information forwarded from that email address to your account. This will help you add travel plans and receipts to your SAP Concur account.

Travel Plans: When you connect a new or existing Triplt account using a verified email address you'll be able to forward confirmation emails to plans@tripit.com. Plans organized in Triplt will then sync to your SAP Concur account. You can connect an account in the App Center.

Receipts: Forward your receipt images to receipts@concur.com to have your receipts uploaded into your **Available Receipts** list.

Follow the step-by-step instructions in your profile:

Email Addresses

Please add at least one email address.

[How do I add an email address?](#)

1. Select **Add an email address** below.
2. Enter your email address.
3. Select **Yes** to have SAP Concur travel notifications sent to that email account.
4. Click **OK** to save.

[How do I verify my email address?](#)

1. Once you've added an email address, select **Verify**.
2. You will be sent a verification email. Locate the code included in the email.
3. In your SAP Concur solution, enter the code into the Enter Code field next to the email address you're verifying.
4. Click **OK** to complete verification.