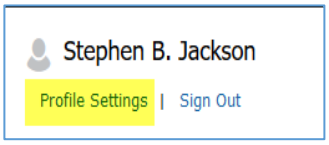
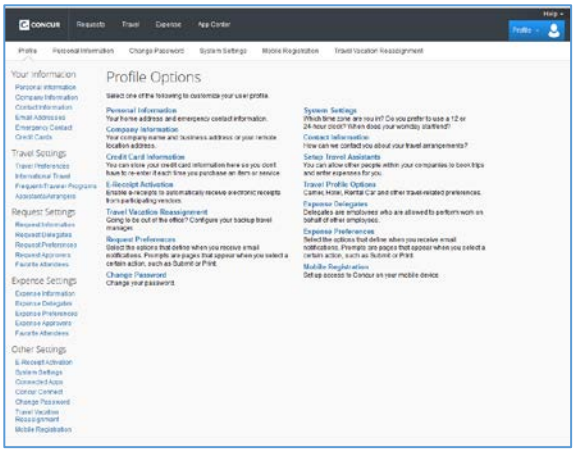
1.

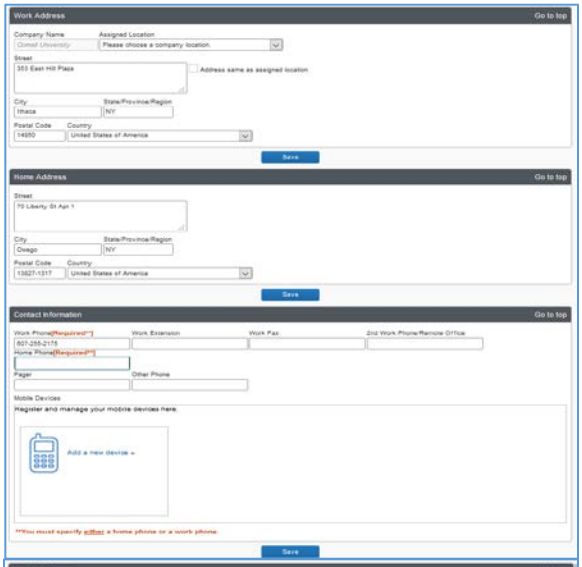


Concur Profile

- Login with your NetID (CU) at **concur.cornell.edu**
- Click Profile in the upper right hand corner of the screen.
- Click **Profile Settings**

2.





Profile Options

Personal Information

Confirm your information.

Note: Verify that your first, middle and last name are correct. This information is pre-filled automatically from Workday. Based on TSA regulations, your middle name can be either your full middle name or your middle initial, either is acceptable. If your full middle name appears in Concur, this field is locked down and cannot be changed in Concur. If you need it changed, please contact your HR representative to have the change made in Workday. If you do not have a middle name, check the No Middle Name box.

Company Information, Work, Home & Contact Information/Address (Workday is the source of this information)

Company Information: Should see Employee Id

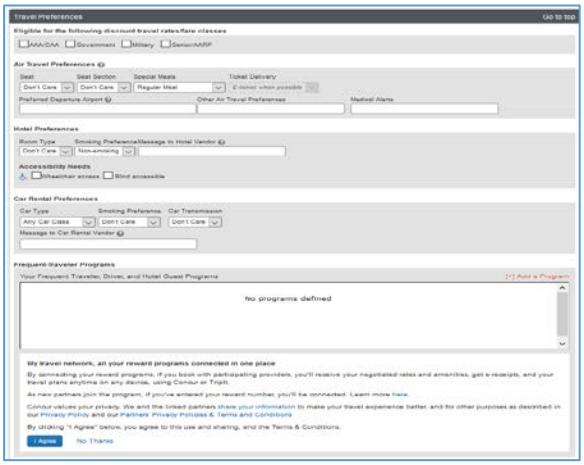
Work Address

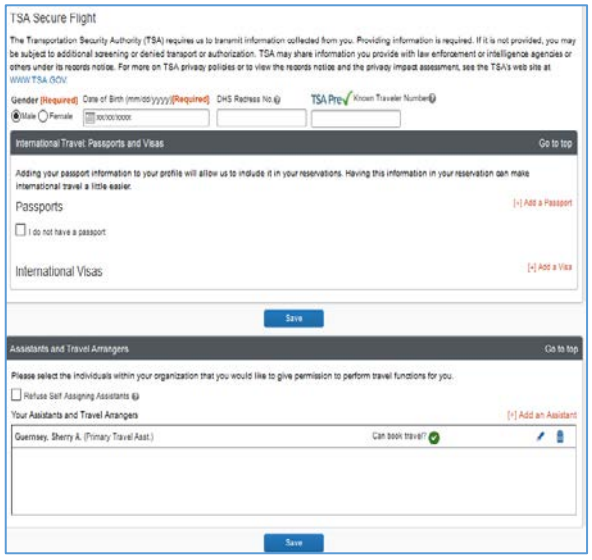
- **Assigned Location**
- Please choose a company location from the drop-down menu.
- Click **Save**

- You can enter your Mobile Phone if desired.
- Click **Save**

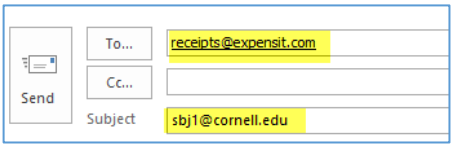
Note: If you enter your mobile phone, you will need to enter your home phone/work phone as well.

Email Address





- **VERIFY** your email address**.** To do this you need to click the verify email link and enter the code sent to your email (NetId@cornell.edu) in Concur. If you have an alias or other email addresses that you may be sending from you will need to enter AND verify each address you intend to use it's recognized by Concur.



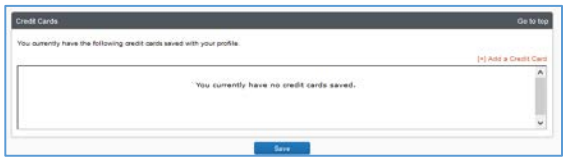
NOTE: Do not use an alias or other email address in the subject line when submitting receipts. If the Traveler is submitting their receipt(s) via receipts@expenseit.com they do not need to add their NetID to the subject line. If the Delegate is submitting a receipt(s) on behalf of a Traveler then they have to add the NetID@cornell.edu in the subject line. The delegate must be set-up as a Delegate in the travelers profile.

Emergency Contact

- Enter your Emergency Contact information.
- This is NOT required, but is useful for Travel booking and Risk Management
- Click **Save**

Travel Preferences (as applicable)

- Eligible Discount Travel
- Air Travel Preferences
- Hotel Preferences
- Car Rental Preferences
- Frequent-Travel Programs
  - Click [+] Add a Program
- Advantage Programs
  - Click [+] Add a Program



TSA Secure Flight (this is part of the feed)

- Gender and DOB will come in from the feed from Workday.
- **Note:** DOB will be masked with XX/XX/XXXX. Do not change.
- Enter your DHS Release No. and TSA Pre-Check Number, if applicable.
- Click **Save**

International Travel: Passports and Visas (as applicable)

- **Note:** Not required, but helpful for Travel bookings.

Assistants and Travel Arrangers

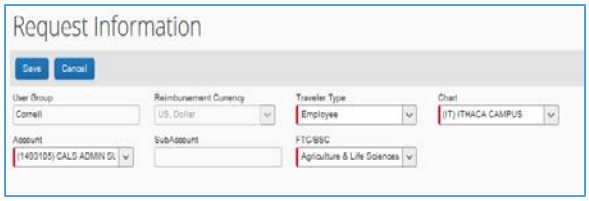
- Click [+] Add an Assistant
- Search by name or NetID
- Select
- Check **Can book travel for me,** if appropriate.
- Check **Is my primary assistant for travel** (you can only have one).
- Click **Save**

Credit Cards

- Click [+] Add a Credit Card
- **Enter your personal Credit Card information if used for business travel.**
- Enter your US Bank Corporate Liability Credit Card, if applicable.
- Check **if you want the card as the default for:** Plane Tickets, Rail Tickets, Car Rentals and/or Hotel Reservations.
- Enter the Billing Address.
- **Note:** The billing address for the US Bank corporate liability card will be YOUR home billing address.
- **Note**: All credit card #'s are masked except that last 4-digits
- Click **Save**

Click **Save** at the bottom of the screen.

3.

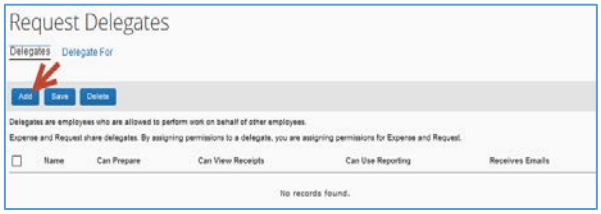


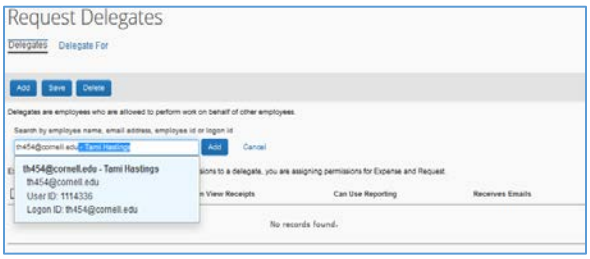
REQUEST SETTINGS
(This is a feed from Workday)

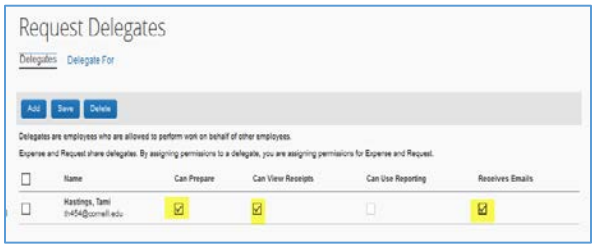
Request Information

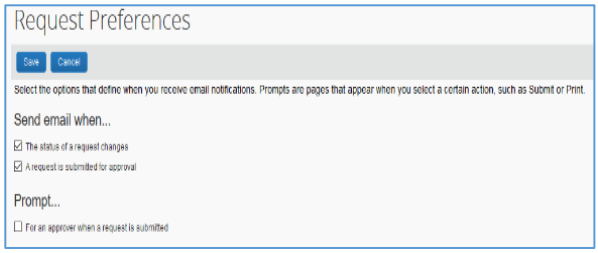
- Verify this information is correct
- **Note:** The account# defaults in from your payroll account #.
- You can change the account if needed, but this can also be changed at the Request/Expense level.
- **Verify that the FTC/BSC and Department is correct.**
- Click **Save (if you made changes)**

4.









Request Delegates

- If you have a Delegate (Assistant/Travel Arranger), click **Add.**
- Search for them using their NetID@cornell.edu
- Select the delegate.
- Click **Add**
- Click the appropriate check boxes: Can Prepare, Can View Receipts, and Receives Emails (if applicable).
- **Note:** If you check Can Prepare, a checkbox is automatically entered for Can View Receipts.

Request Preferences

- Do **NOT** check Prompt, for an approver when a request is submitted.

Request Approvers

- This is your Supervisor listed in Workday (grayed out).

Favorite Attendees (skip)

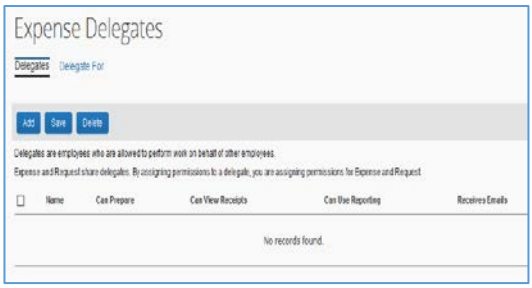
5.

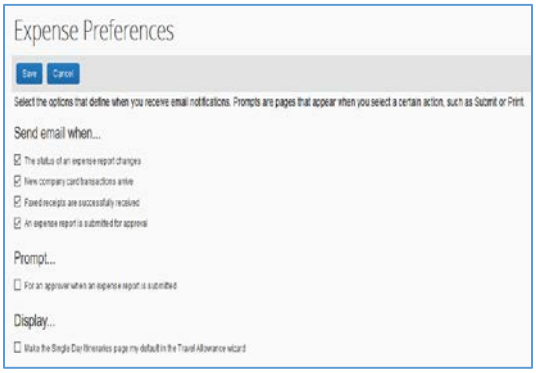
EXPENSE SETTINGS
(This is a feed from Workday)

Expense Information

- Verify this information is correct
- **Note:** The account# defaults in from your payroll account #.
- You can change the account if needed to your primary travel account, but can also be changed at the Request/Expense report level.
- **Verify that the FTC/BSC and Department are correct.**
- Click **Save** (if changes were made)

6.





Expense Delegates

- If you have a Delegate (Assistant/Travel Arranger), click **Add.**
- Search for them using their NetID@cornell.edu
- Select the delegate.
- Click **Add**
- Click the appropriate check boxes: Can Prepare, Can View Receipts, and Receives Emails (if applicable).
- **Note:** If you check Can Prepare, a checkbox is automatically entered for Can View Receipts.

Expense Preferences

Send email when…

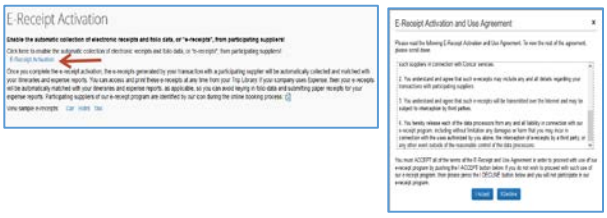
- These selections are automatically checked
- You can uncheck any that you don't need.

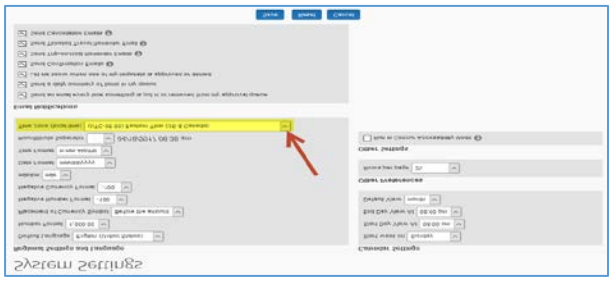
Expense Approvers (skip)

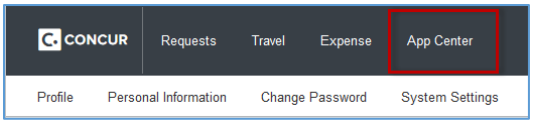
- We are using KFS Org Managers as Expense Approvers and they are already linked to the account. This will always be blank

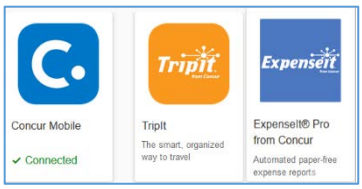
Favorite Attendees (skip)

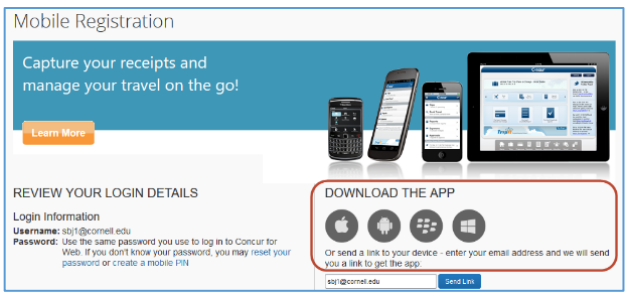
7.











OTHER SETTINGS

E-Receipt Activation

- Click **E-Receipt Activation**. This enables the automatic collection of electronic receipts and folio date, or "e-receipts", from participating providers.
- Read and click **I Accept.**

System Settings

- For people living in different time zones you may need to change the Time Zone (local time) setting. Double check to make sure it is correct, if not, select it from the drop down list and click **Save**.

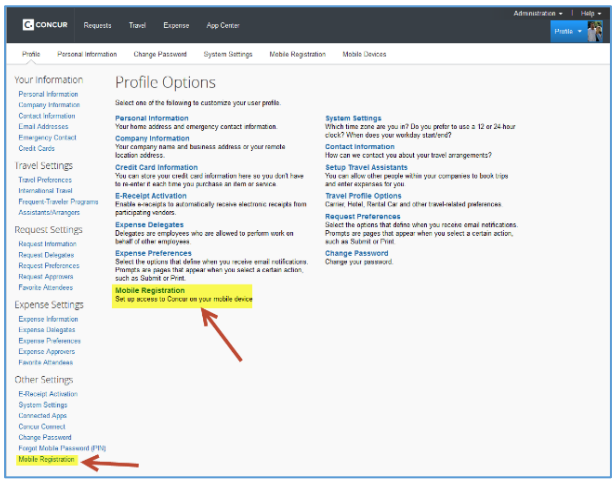
App Center

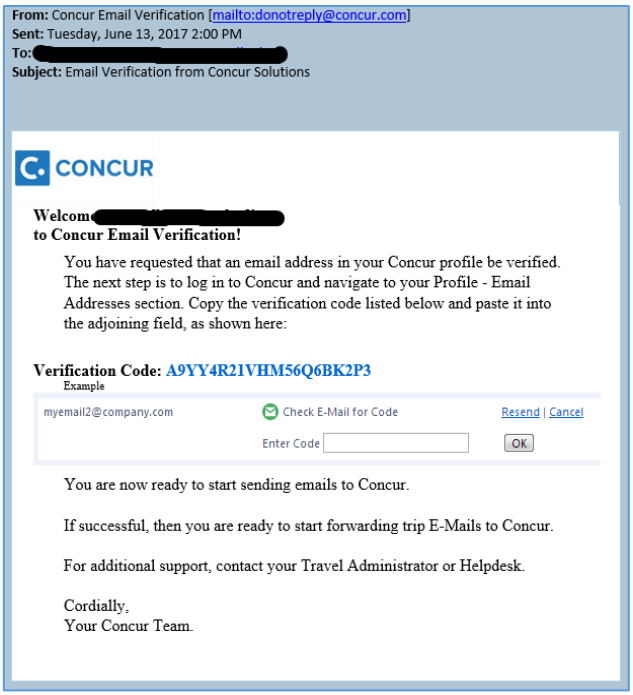
There are an array of apps that connect to the Concur travel system that you can use. **Concur Mobile, TripIt Pro and ExpenseIt.** We suggest you connect to Concur Mobile and TripIt Pro to get the most benefits the Concur travel system has to offer. Click on any of the apps to load them but please note that only apps created by Concur are supported and other apps are made by third parties and may not work on all devices.

Complete guides for each of these apps and mobile device can be found on the Training and Guides blog ***Using Mobile Apps*** (http://blogs.cornell.edu/travel/training-and-guides/).

Concur Mobile:

Download the application from your Apple, Blackberry, Android or Microsoft app store and click Concur (name could vary Concur Travel, Receipts, Expense Reports). You will be required to have a passcode (security swipe or code on your mobile device to use the app).





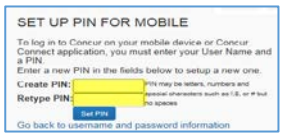
NOTE: You must create your PIN in Concur first and then log into the app. When you login to the APP, you will use your PIN versus your email password.

The mobile app includes:

- Manage and track business expenses and receipts
- View credit card transactions and add them to expense reports
- Capture receipts with your camera phone
- Submit and approve expense reports (approve invoices too!)
- Manage and track business travel
- Book airfare, hotels and more
- Manage flight, hotel and car itineraries
- Check flight status
- Approve travel requests
- Change/cancel reservations

Signing-up for Concur Mobile:

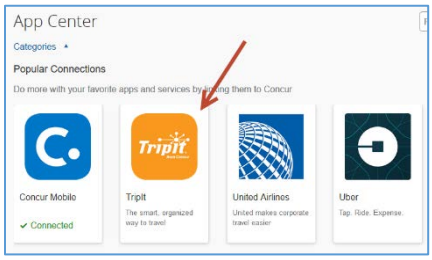
- Download the app to your phone as described above.
- Log into Concur. Go to: **Profile Settings** and click on **Mobile Registration.**
- Click **create a mobile PIN**

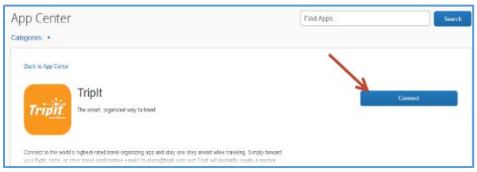


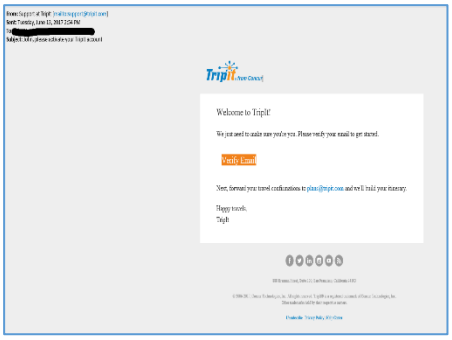
- This PIN is what you will use (with your email address) to log into Concur Mobile so make sure it is something you will remember.

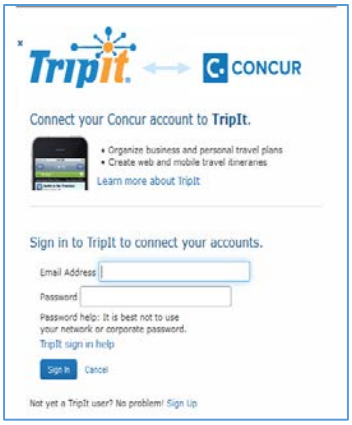
NOTE: You will receive an email with a verification code to activate your email for Concur Mobile.

- Log On by locating the Concur icon on your application menu. Start the application and log in with your mobile pin. The Concur home screen appears. It provides your main menu, shows your Travel and Expense options, and more.









Tripit Pro: Simply forward confirmation emails to plans@tripit.com and TripIt will create a master itinerary for each trip with all travel details in one place.

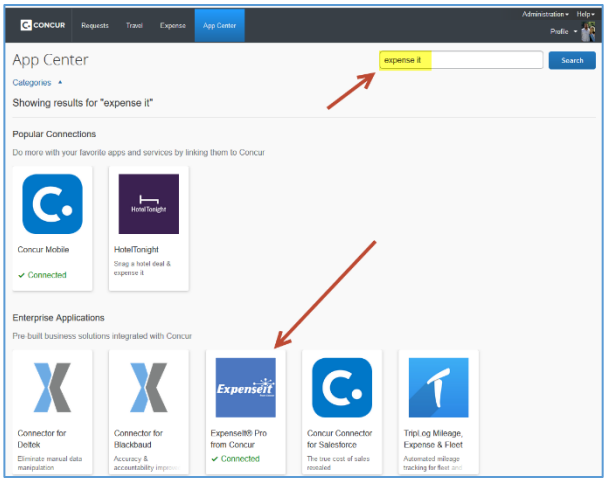
- Alerts. Sends real-time alerts for delays, cancellations, and gate changes.
- Alternate Flights. Finds you alternate flights with open seats, fast.
- Seat Tracker
- Point Tracker
- Flight Refunds

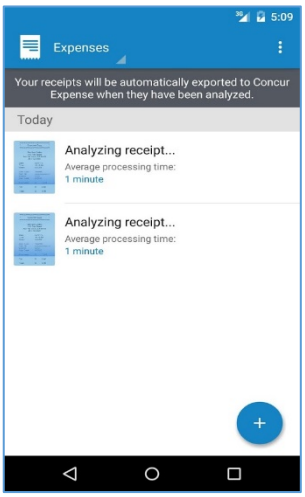
Installing the Tripit Pro mobile app:

- Download the Tripit mobile app to your mobile device (from Google Play Store or iTunes Store) so you can view your trips on your phone. It is listed in the app stores as “Tripit: Travel Organizer”.
- Create your password (Cornell policy states you should not use your Cornell email password).

NOTE: An email will be sent to you with a link that you will need to click to activate your account.

Once you have an account, you can log into Tripit on the web or mobile device using your email address and password that you created.





ExpenseIt: ExpenseIt transmits your receipt data to Concur and automatically creates expense line items using OCR technology and will itemize your hotel receipt (only hotel will itemize). Once you move the receipt items to an expense report you can review and, if needed, make edits. **You do not need the app to take advantage of emailing receipts as long as you have verified your email address in you profile and send the image to receipts@expenseit.com**

- Automatically reconcile expenses with charge card transactions, if available.
- Automatic itemization of hotel expenses.
- Take a snapshot of your receipt and email your receipts to receipts@expenseit.com. Concur will automatically create expense transactions for the expense report.

Note: Please be aware that some apps can be used for personal use and could create a problem if you have them tied to your corporate card. If there is a chance that you will use an app for personal travel, you should change the default credit card to your personal credit card to avoid inadvertent personal charges to your Cornell card.

The pin you used for Concur Mobile will also be used for access to ExpenseIt (NetID@cornell.edu, enter Pin Number for Concur Mobile)

Example: **Parkmobile**

Connected Apps
This displays the app you are currently connected to in Concur.

Concur Connect (do not change)

	Change Password (skip) we do not change passwords in Concur since we are using Cornell Single Sign-on.