

Columbia University Finance Training

Training Guide: Setting up Your Concur Profile for Expense (Only) Users

Your Concur Profile stores personal information used for creating expense reports. Upon initial log in to Concur, you should verify and update your Profile. You can update your personal information, departmental information, default ChartFields, and email addresses. In addition, you can name Delegates to prepare Requests and Expense Reports on your behalf.

Table of Contents

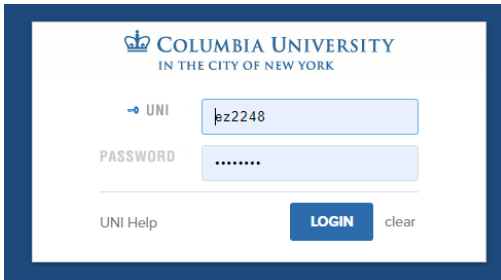
Logging in to Concur and Accessing Your Profile Settings.....	2
Updating Required Information.....	3
Confirming Your Name.....	3
Confirming Company Information.....	3
Entering Contact Information.....	3
Entering an Emergency Contact.....	4
Confirming Default Approver.....	4
Other Information.....	4
Work Address and Home Address.....	4
Email Addresses.....	5
Request and Expense Settings.....	5
Request/Expense Information.....	6
Adding Optional International Travel: Passports and Visas.....	6
Delegates.....	7
Request Preferences.....	8
Expense Preferences.....	8
Favorite Attendees.....	9
International Travel.....	10
Other Settings.....	10
System Settings.....	10
Connected Apps.....	10
Concur Connect.....	10
Concur Mobile Registration.....	11
Getting Help.....	11

Columbia University Finance Training

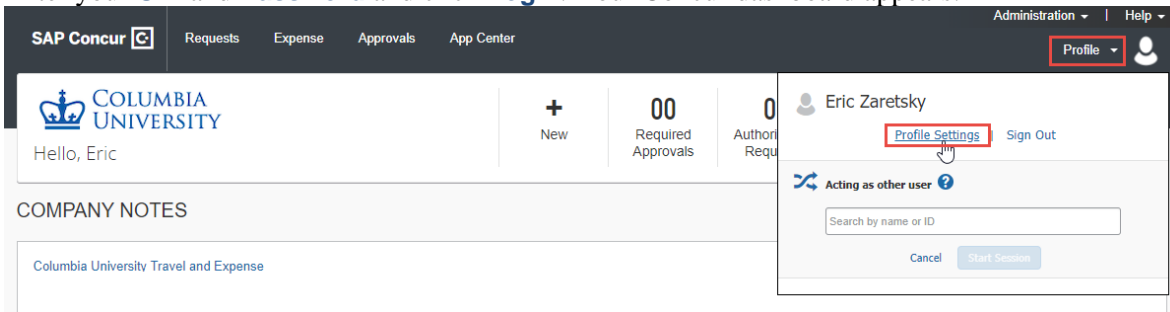
Training Guide: Setting up Your Concur Profile for Expense (Only) Users

Logging in to Concur and Accessing Your Profile Settings

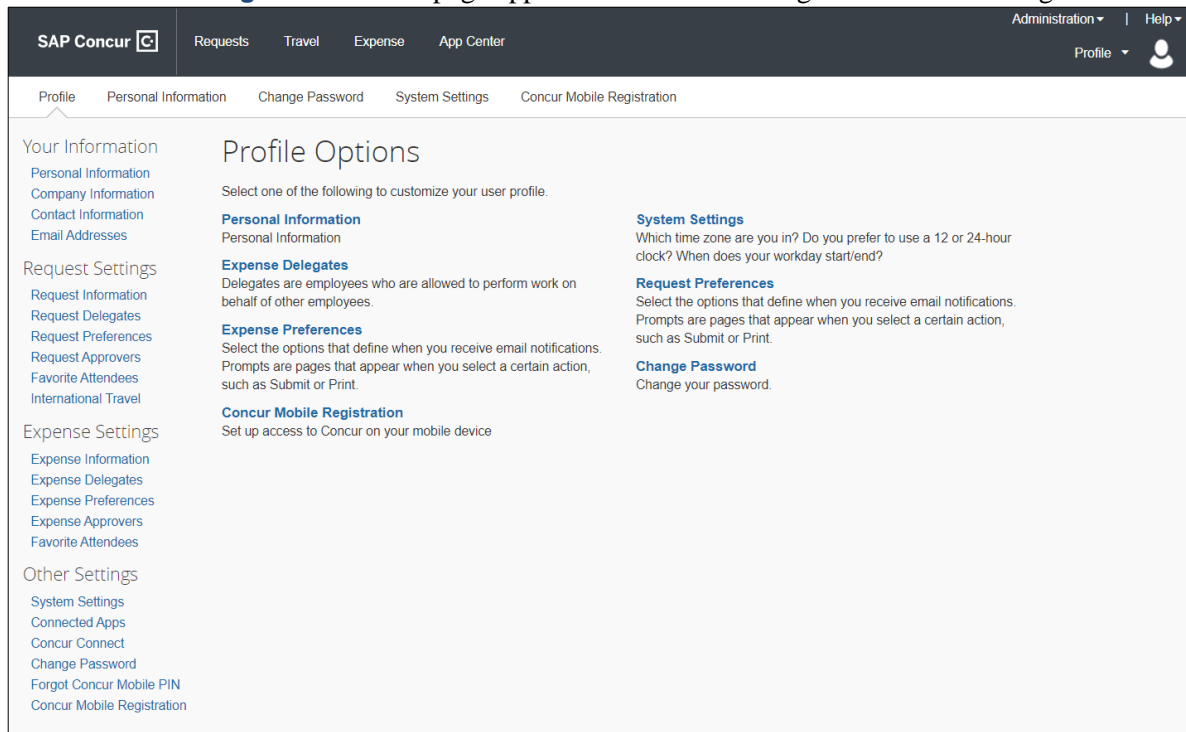
1. Access Concur from the Columbia Travel and Expense Portal.



2. Enter your **UNI** and **Password** and click **Login**. Your Concur dashboard appears.

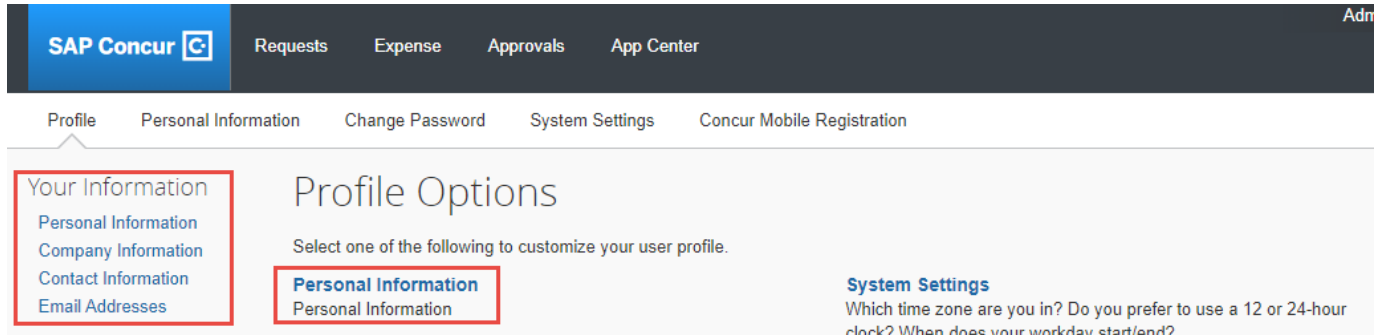


3. Click **Profile** on the top right of your screen.
4. Click **Profile Settings**. The Profile page appears with links to navigate to Profile Settings.



Updating Required Information

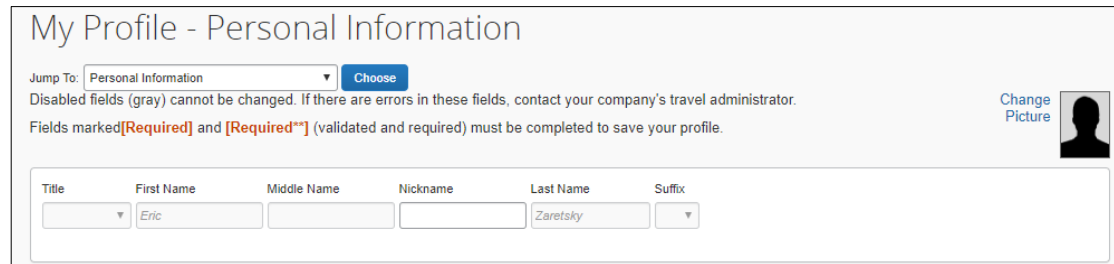
You will find the most common profile tasks on the **Profile Options** page. You can also use the menus on the left to select a setting to update.



Click the **Personal Information** link from the left menu or the Profile Options. The Your Information page appears. You can also scroll to sections for Company Information, Contact Information and Email Address on this page. You cannot click Save until all required fields are complete.

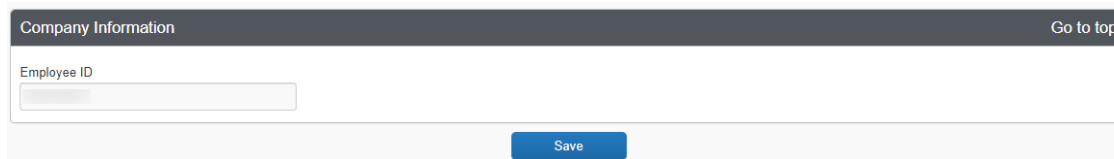
Confirming Your Name

Your name appears as it would in the PAC system. If there is a discrepancy, speak with your Departmental HR representative regarding the process for updating PAC.



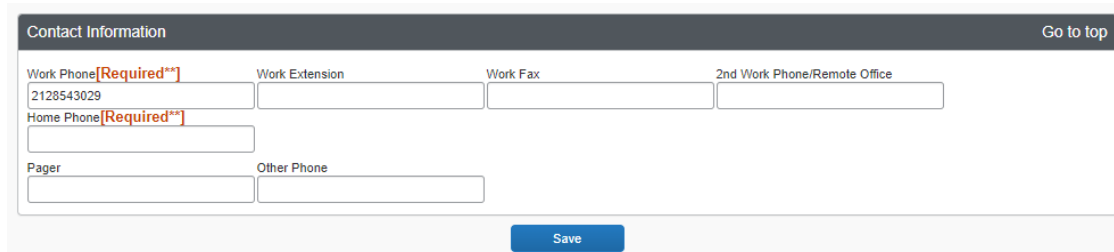
Your Middle Name will not be populated from PAC and can only be added if you have access to Concur Travel. Your Middle Name is not required if you have Expense Only access in Concur.

Confirming Company Information



Your **Employee ID**, which is associated with your paycheck information, will be automatically populated. If there is a discrepancy, speak with your Departmental HR representative regarding the issue.

Entering Contact Information



Complete either the **Work Phone OR Home Phone** fields (only one is required). The 'Required' label does not change if you complete one field and not the other.

Columbia University Finance Training

Training Guide: Setting up Your Concur Profile for Expense (Only) Users

After you have completed all required fields, click **Save**.

Entering an Emergency Contact

The screenshot shows the 'Emergency Contact' form. It includes fields for Name (with a red 'Required' label), Relationship (a dropdown menu), Street, City, State/Province, Postal Code, Country/Region (a dropdown menu), Phone (with a red 'Required' label), and Alternate Phone. There is a checkbox labeled 'Address same as employee' which is checked. A 'Save' button is located at the bottom center of the form.

Scroll down to the **Emergency Contact** section to complete the required fields. Click **Save** when complete.

Confirming Default Approver

Navigate to **Request Approvers** or **Expense Approvers** from the menu on the left

The screenshot shows a navigation menu with two columns: 'Request Settings' and 'Expense Settings'. Under 'Request Settings', the 'Request Approvers' link is highlighted with a red box. Under 'Expense Settings', the 'Expense Approvers' link is highlighted with a red box.

The name of your Supervisor will appear in the **Default approver** field if you have a Supervisor in PAC. If there is a discrepancy, speak with your Departmental HR representative. If you do not have a Supervisor, you will need to select an Initial Reviewer when submitting Requests or Expense Reports for approval.

The screenshot shows the 'Expense Approvers' form. It has 'Save' and 'Cancel' buttons at the top left. Below, there are two sections: 'Default approver for your expense reports' and 'Default approver 2 for your expense reports'. The first section has a text input field containing 'kate.sheeran@columbia.edu - Katherine Sheeran'. The second section has an empty text input field. Below these, there is a section for 'Default approver for your cash advance requests' with an empty text input field.

Other Information

Work Address and Home Address

The **Work Address** and **Home Address** sections are optional but recommended to make updating other Profile Settings, such as Credit Cards, easier. In addition, it is also recommended if you anticipate needing to be reimbursed for Personal Car Mileage.

The screenshot shows the 'Work Address' form. It includes fields for Company Name (with 'Columbia University' selected), Assigned Location (a dropdown menu with 'Please choose a company location.'), Street, City, State/Province, Postal Code, and Country/Region (with 'United States of America' selected). There is a checkbox labeled 'Address same as assigned location' which is unchecked. A 'Save' button is located at the bottom center of the form.

Email Addresses

You can email expense receipt attachments to receipts@concur.com, making them available to import into your Expense Reports. You must list any email address, including personal addresses, that you will use for this purpose into this section so that it is recognized by Concur. This would include the email of Expense Delegates who prepare Expense Reports on your behalf (see the section on Delegates). Refer to the FAQ in the section for more details.

If you have multiple Columbia email addresses, such as *firtname.lastname@columbia.edu*, *uni@adcu.columbia.edu*, *uni@cumc.columbia.edu*, etc., it is recommended that you add all variations.

1. Click the **Add an email address** link.
2. Enter your **Email Address**.
3. Click **OK**.
4. Click **Verify**. A verification email with a Verification Code is sent to the address. If you do not see it in your inbox, check your Junk/Spam folder

5. Copy the Verification Code from the email and paste into the **Enter Code** field and click **OK**.

Request and Expense Settings

Request and **Expense Settings** allow you to setup preferences and defaults for when you prepare and submit Pre-Trip Requests, Cash Advance Requests or Expense Reports. Settings for Request/Expense Information, Request/Expense Delegates and Favorite Attendees are exactly the same and updating these settings can be accomplished in either place as the information is identical.

Request Settings	Expense Settings
Request Information	Expense Information
Request Delegates	Expense Delegates
Request Preferences	Expense Preferences
Request Approvers	Expense Approvers
Favorite Attendees	Favorite Attendees
International Travel	

Rather than scrolling through a single page, each setting must be selected in order to view and edit.

Request/Expense Information

Click **Request Information** or the **Expense Information** link to display the form.

The screenshot shows the 'Request Information' form. At the top, there are 'Save' and 'Cancel' buttons. Below are several input fields: 'Reimbursement Currency' (US, Dollar), 'User Type' (Officers of Administration), 'User Type Sub-category' (Director - TECH), and a 'Request Authorization' checkbox. The 'School' field is '(140000X) FIN Finance'. 'Division' is '(14AD00X) FIN Administration'. 'Sub-Division' is '(140400X) FIN Finance Servic'. The 'Admin Department' field is '(1404202) FIN Finance Info S'. Below these are 'GL BU' (1), 'Department' (2), 'PC Business Unit' (3), and 'Project' (4). 'Activity' is 5. 'Initiative', 'Segment', and 'Site' are empty.

The Request / Expense Information is pre-populated from PAC with your School, Division, Sub-Division and Admin Department. These values will default to new Requests / Report and have an impact on workflow routing. The Division will drive workflow routing to Senior Business Officers when applicable.

The **Admin Department** will drive workflow routing to the Initial Reviewer when applicable. It is possible that your Level 8 Admin Department may not be populated. Ask your School or Department Senior Business Officer for guidance on how to update PAC.

Enter the **ChartFields**. If you enter codes in the ChartFields rather than text, click the field dropdown and select **Code**.

The screenshot shows a dropdown menu for the 'Project' field. The selected value is '4'. Below the dropdown, there is a search bar with the text 'Type to search by:'. There are two radio buttons: 'Text' (selected) and 'Code'. Below the radio buttons, there is a list of search results, with 'GI Funding (UR004672)' visible.

These will also populate as the default in new Requests / Reports. The **Department (2)** ChartField (and Dollar amount) will drive workflow routing to a Financial Approver. If you leave any ChartFields blank, you will need to complete those ChartFields on your Requests or Expense Reports.

Adding Optional International Travel: Passports and Visas

Optionally, you can your **Passports and Visas** information to your profile. If you add your passport information, make sure to populate all the fields.

The screenshot shows the 'International Travel: Passports and Visas' form. At the top right, there is a 'Go to top' link. Below the title, there is a paragraph of text: 'Adding your passport information to your profile will allow us to include it in your reservations in advance of your arrival at the airport. When entering your passport information, please include all 7 requested fields, i.e. passport date of birth, passport nationality, etc.' Below this text, there are two sections: 'Passports' and 'International Visas'. The 'Passports' section has a checkbox 'I do not have a passport' and a red '+' button labeled 'Add a Passport'. The 'International Visas' section has a red '+' button labeled 'Add a Visa'.

Delegates

You can name colleagues to act on your behalf to prepare Requests, Expense Reports, or book Travel. **Delegates** can create the reports and notify you when complete but they cannot submit expense reports on your behalf. You will receive notification when the report is ready to review and submit. If you are an Approver, you can name a colleague to approve Requests or Reports on your behalf. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate. Please note that Delegates cannot use the Concur Mobile App when acting on your behalf and must use the Concur Desktop Application.

Click the **Request Delegates** or the **Expense Information** link to display the form.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
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1. Click **Add**.
2. Type your **Search** using last name, UNI, email, etc. A list of matches appears.

Search by employee name, email address, employee id or login id

Sheeran, Kate Add

Sheeran, Kate
User ID: ks2070
Logon ID: ks2070@columbia.edu

3. Select the desired match or click the **Add** button next to the search field if your selection is not added.
4. Select the appropriate **checkboxes** to assign the permissions you wish to give the Delegate:
 - **Can Prepare** -The Delegate may prepare Expense Reports and Requests on your behalf. You will still be required to submit the Report for approval
 - **Can Submit Reports** – The Preparer Delegate is able to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate cannot submit the Expense Report into workflow for approval. Two things will happen: 1) your Delegate will see any audit alerts that may prompt them to check for accuracy and completeness; 2) you will receive an email notification that your Delegate has created an Expense Report which should be ready for review and submission. You will need to open the Report created on your behalf and click Submit Report to enter it into workflow for approval. If you do not authorize your Delegate to Submit Reports, they will not see the Submit Report button. Instead, the Delegate will see the Ready For Review button once they have finished preparing your Expense Report. When clicked, an email will be sent alerting you that your Expense Report is ready for review and the report status will change to Ready for Review. You must review the Report for accuracy and completeness prior to submitting it into workflow for approval.
 - **Can Submit Requests** – The Preparer Delegate is able to click Submit Request once they have finished preparing your Request. This works the same as Can Submit Reports. See details above.
 - **Can View Receipts** - Defaulted when selecting Can Prepare. This allows the Delegate to view your receipt store, receipts images, etc.
 - **Can Use Reporting** - If you have any reporting rights (typically restricted) you may assign that reporting license to a maximum of two individuals
 - **Receives Emails** – The Delegate receives all the same Concur emails as you
 - **Can Approve** - If you are an Approver, the Delegate may approve Reports and Requests on your behalf. The Delegate must also be setup in Concur as an Approver
 - **Can Approve Temporary** – Indicate the date range you are giving this Delegate to approve reports and requests on your behalf

Columbia University Finance Training

Training Guide: Setting up Your Concur Profile for Expense (Only) Users

- **Can Preview for Approver** – The Delegate will be able to review / validate all information that the approver sees, but cannot approve, when they are acting as that Approver
- **Receives Approval Emails** -This Delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Sheeran, Kate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 01/27/2020 01/31/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

6. Click **Save**.

Request Preferences

Click the **Request Preference** link to display the settings.

Request Preferences

Save Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- The status of a request changes
- A request is submitted for approval

Prompt...

- For an approver when a request is submitted

You can turn on or off email alerts and prompts associated with Requests. Select the desired options and click **Save**.

Expense Preferences

Click the **Expense Preference** link to display the settings.

Expense Preferences

Save Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- The status of a cash advance changes
- A cash advance is submitted for approval
- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval
- A card feed import completes

Prompt...

- For an approver when an expense report is submitted

Display...

- Make the Single Day Itineraries page my default in the Travel Allowance wizard

You can turn on or off email alerts and prompts associated with Requests and Expense Reports. Select the desired options and click **Save**.

Favorite Attendees

Click the **Favorite Attendees** link to add or edit Attendees.

Favorite Attendees

Attendees | Attendee Groups

Find every attendee where Last Name [v] Begins With [v] zaretsky [Go] [Advanced Search](#)

[New Attendee](#) [Edit](#) [Delete](#)

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type
No Attendees Found				

When preparing an Expense Report, the names and details of attendees are required for several Expense Types, such as Business Meals and Entertainment. You can save Favorite Attendees and Attendee Groups if you anticipate creating multiple Reports with the same attendees (i.e., recurring team meetings or events.)

Adding a Favorite Attendee

1. Click **New Attendee**. The Add Attendee form appears.

ADD ATTENDEE

Attendee Type [CU Administration v] Last Name [] First Name []

2. Select the **Attendee Type** from the dropdown menu.

Attendee Type

- CU Administration
- CU Administration
- CU Alumni
- CU Donor
- CU Faculty
- CU Recruit
- CU Student
- Group Event - 10+ Attendees
- Outside Party
- Spouse/Significant Other/Dependent

3. Enter the **Last Name** and **First Name**.
4. Click **Save**.

Adding an Attendee Group

1. Click the **Attendee Groups** tab.

Attendees | Attendee Groups

[Add New](#) [Edit](#) [Send Copy](#) [Delete](#)

Attendee Name	Attendee Title	Institution/Com...	Attendee Type
No Attendee groups found			

2. Click **Add New**. The Group form appears displaying the Favorite Attendees list.

Attendees | Attendee Groups

Find every attendee where Last Name [v] Begins With [v] * [Go]

Group Name [] [Save Group](#) [Cancel](#)

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type
<input type="checkbox"/>	Kris, Carballo			CU Administration
<input type="checkbox"/>	Sheeran, Katherine			CU Administration

2. Type the **Group Name** and select the desired **Attendee Names** to be in the group.

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type
<input checked="" type="checkbox"/>	Kris, Carballo		CU Administration	CU Administration
<input checked="" type="checkbox"/>	Sheeran, Katherine		CU Administration	CU Administration

4. Click **Save Group**.

International Travel

Adding Passport and Visa information is optional for those that do not have a Concur Travel Profile.

International Travel: Passports and Visas

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports + Add a Passport

I do not have a passport

International Visas + Add a Visa

Save

Other Settings

Other Settings include preferences for language, calendar and number format, Apps from various vendors that you can connect to Concur, and Mobile PIN resets.

- System Settings
- Connected Apps
- Concur Connect
- Change Password
- Forgot Concur Mobile PIN
- Concur Mobile Registration

System Settings

System Settings

Regional Settings and Language

Default Language: English (United States)

Number Format: 1,000.00

Placement of Currency Symbol: Before the amount

Negative Number Format: -100

Negative Currency Format: -100

Date Format: mmi/dd/yyyy

Time Format: h:mm AM/PM

Hour/Minute Separator: : 01/21/2020 11:47 am

Time zone (local time): (UTC-05:00) Eastern Time (US & Canada)

Calendar Settings

Start week on: Sunday

Start Day View At: 08:00 am

End Day View At: 08:00 pm

Default View: month

Other Preferences

Home Page: [Dropdown]

Rows per page: 25

Save Reset Cancel

1. Select the desired **Regional Setting and Language**, **Calendar Settings** or **Other Preferences** settings.
2. Click **Save**.

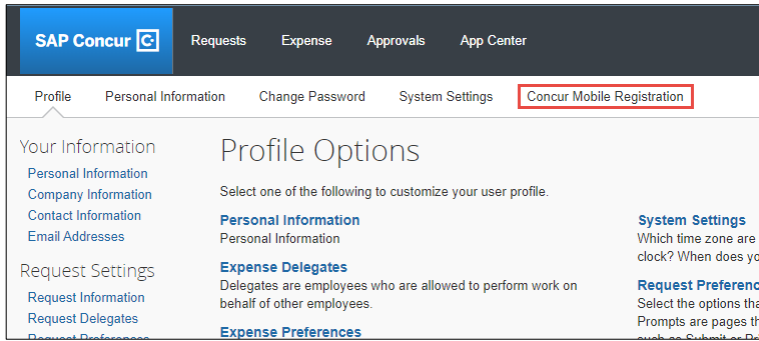
Connected Apps

The Connected Apps page lists vendors that you can link into Concur to help you manage expenses and receipts.

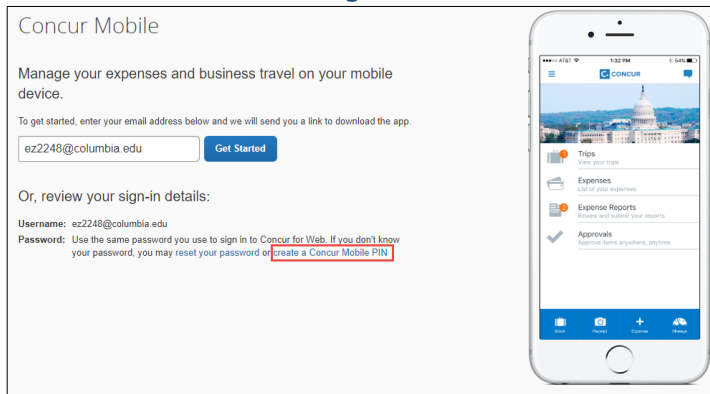
Concur Connect

Concur Connect displays the apps that are currently linked to Concur account.

Concur Mobile Registration



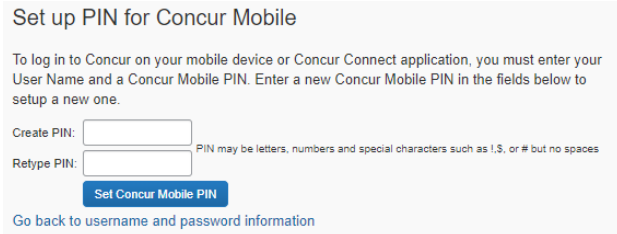
1. Click the **Concur Mobile Registration** tab. The Concur Mobile page appears.



The **email address** associated with your Concur account is populated. You can click **Get Started** to receive a link to download the Mobile App.

Important: *You cannot use the same password for the mobile app as the one used to log into Concur. Do not reset your password.*

2. Click **create a Concur Mobile PIN**. The fields to create the PIN appear.



3. Create and retype a PIN in **Create PIN** and **Retype PIN** and click **Set Mobile PIN**. You can use letters, numbers, or special characters but no spaces; a minimum of four characters is recommended.
4. Install the Concur Mobile App on your phone via the **App Store** or **Google Play**. If you clicked Get Started above, you can use the link in the email sent to you. Open the app and sign in with your email and PIN. Refer to the job aid for **Setting Up and Installing Concur Mobile, Triplt, and ISOS Apps** for more details.

Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>