

Overview

This guide outlines the steps to update your expense and travel profile.

You can update information, such as personal information, contact information, email addresses, and travel preferences. You can view the approvers of requests and expense reports, adjust system settings, activate e-receipts to use in expense reports, and download the Concur mobile app to capture receipts on the go. This guide is not comprehensive; it is meant to communicate the most commonly used Concur profile features and to facilitate timely approvals and travel reimbursements.

Notes: 1) It is highly recommended that you verify your email address, validate your legal name for air travel, and opt into E-receipts. 2) You also need to update your travel preferences.

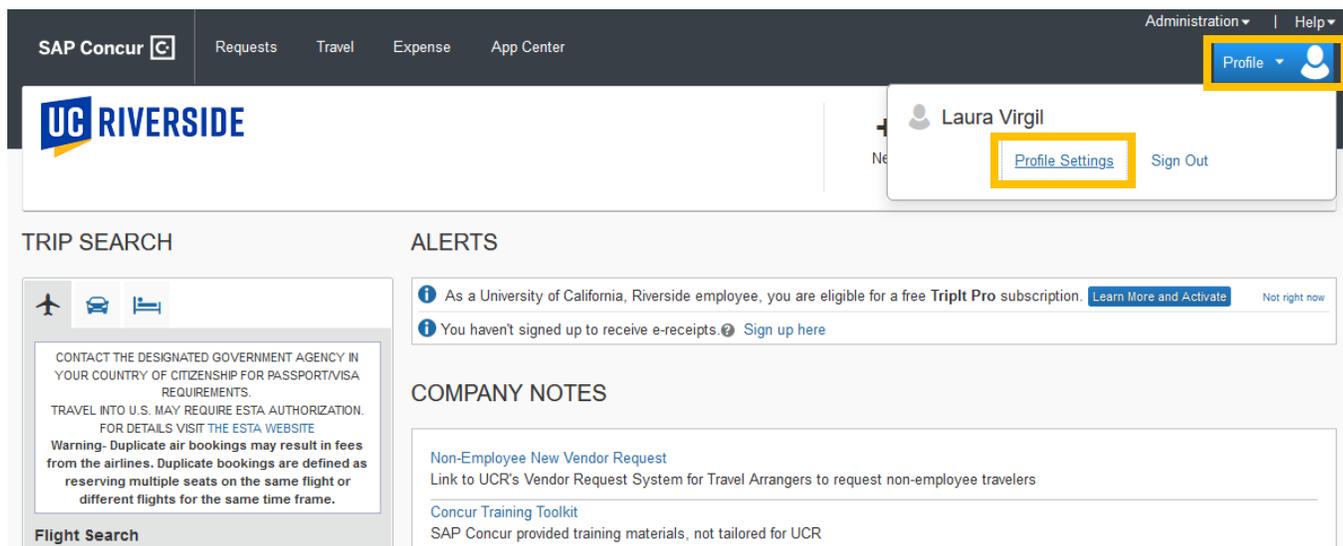
This guide covers the following topics:

- Updating your information
- Updating request and expense settings
- Updating system settings



Steps to Take

Log in to Concur. To access your profile from the Concur home page, click **Profile** and then click **Profile Settings**.



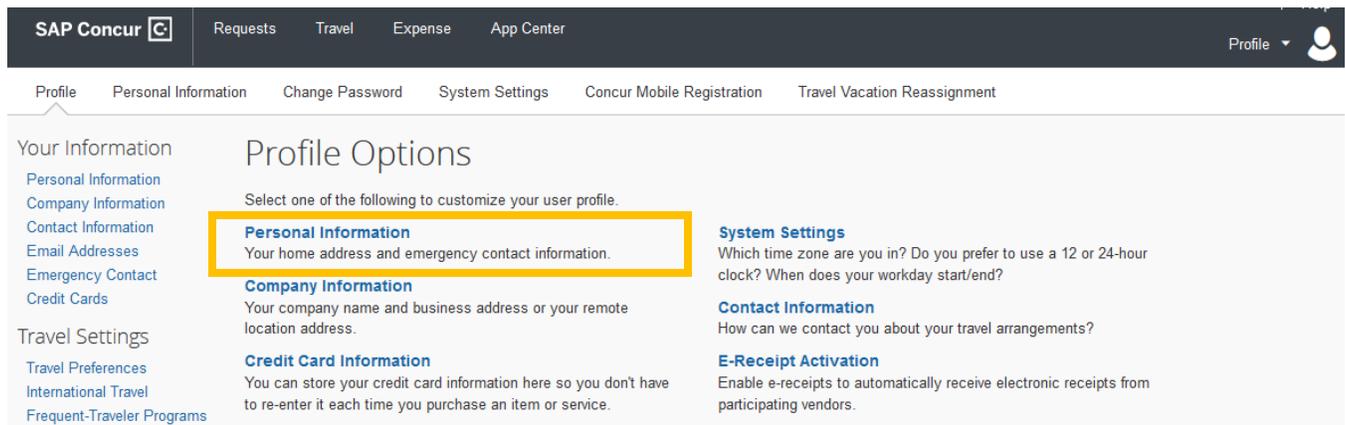
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Travel', 'Expense', and 'App Center' tabs. On the right, there are 'Administration' and 'Help' dropdown menus. A 'Profile' dropdown menu is highlighted with a yellow box, showing a user profile for 'Laura Virgil' and a 'Profile Settings' link, which is also highlighted with a yellow box. Below the navigation bar, the 'UC RIVERSIDE' logo is visible. The main content area is divided into sections: 'TRIP SEARCH' with flight, car, and hotel icons; 'ALERTS' with two informational messages; and 'COMPANY NOTES' with links for 'Non-Employee New Vendor Request' and 'Concur Training Toolkit'.

Note: 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.

Updating your Information

Step 1: Click the Personal Information option to review and update your personal information, contact information, and emergency contacts.

Note: You can also update your information by clicking the respective options available under **Your Information** section on the left.



Step 2: Validate the information in the **My Profile - Personal Information** section and update as needed. You can also upload your profile picture.

Note: Ensure that your name on Concur profile matches with the name in your legal ID documents. Your air tickets will get issued by the name displayed in the Personal Information section.

SAP Concur | Requests | Travel | Expense | App Center | Profile

Profile | Personal Information | Change Password | System Settings | Concur Mobile Registration | Travel Vacation Reassignment

Your Information
 Personal Information
 Company Information
 Contact Information
 Email Addresses
 Emergency Contact
 Credit Cards

Travel Settings
 Travel Preferences
 International Travel
 Frequent-Traveler Programs

Request Settings
 Request Information
 Request Delegates

My Profile - Personal Information

Jump To: Personal Information | Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.
 Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
	Laura	Shannon		Virgil	

Company Information | Go to top

Step 3: Review your **Employee ID** for accuracy in the **Company Information** section. Note: The **Employee ID** field will be auto-populated.

My Profile - Personal Information

Jump To: Personal Information | Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.
 Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
	Laura	Shannon		Virgil	

Company Information | Go to top

Employee ID
 10359285

Manager | Org. Unit/Division | Employee Position/Title
 ASIRRA ELLIS SUGU | | COMM SPEC 4

SORT3
 E010359285

Step 4: Scroll down and update your **Work Address** and **Home Address**.

Favorite Attendees

Other Settings

- E-Receipt Activation
- System Settings
- Concur Connect
- Change Password
- Travel Vacation Reassignment
- Concur Mobile Registration

Work Address

Go to top

Company Name Assigned Location
University of California Please choose a company location

Street Address same as assigned location

City State/Province

Postal Code Country/Region
 United States of America

Save

Home Address

Go to top

Street

City State/Province

Postal Code Country/Region

Step 5: Scroll down further and update your **Contact Information**. **Work Phone** and **Home Phone** are required fields.

Contact Information

Go to top

Work Phone **[Required**]** Work Extension Work Fax 2nd Work Phone/Remote Office

Home Phone **[Required**]**

Pager Other Phone

Mobile Phone Country/Region Mobile Phone

United States of America (+1)

****You must specify either a home phone or a work phone.**

Save

Step 6: Select **Verify** your email address in the **Email Addresses** section to ensure you get the necessary emails, reminders, and other required communication.

Note: Click **Add an email address** to add any additional (personal) email addresses that you will need to use.

Email Addresses Go to top

Please add at least one email address.

[How do I add an email address?](#)
[How do I verify my email address?](#)
[Why should I verify my email address?](#)
[If I am a travel arranger or delegate, what do I need to do?](#)
[I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?](#)

+ Add an email address

Email Address	Verification Status	Verify	Contact?	Actions
Email 1	laura.virgil@ucr.edu	✔ Verified	Disable Verification	Yes ✎

Step 7: Update the **Emergency Contact** section.

Emergency Contact Go to top

Name Relationship

Street Address same as employee

City State/Province Postal Code

Country/Region Phone Alternate Phone

Step 8: Continue scrolling down to the **Travel Preferences** section and complete all relevant travel preferences -e.g., seat preferences, hotel preferences, frequent traveler programs, and more. When using Concur Travel to book air, hotel, or rental car, search results are personalized based on travel preferences.

Travel Preferences Go to top

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

Air Travel Preferences ?

Seat Seat Section Special Meals Ticket Delivery

Preferred Departure Airport Other Air Travel Preferences Medical Alerts

Step 9: Click **Enroll** for **Travel Partner Integrations** to allow plans and receipts to be shared between Concur and participating travel partners (Ex. American Airlines receipt will automatically be sent to Concur when the flight is booked in Concur Travel). This will help you (or your Travel Arranger) spend less time managing and expensing your trips.

Travel Partner Integrations

When you allow travel partner integrations, we'll be able to add plans and receipts for the business travel you book to your SAP Concur account. Bookings must be made on participating and connected sites for the integration to work. This will help you spend less time managing and expensing your trips.

Connecting accounts allows integrations between your SAP Concur account and the accounts of participating travel partners stored in your profile. You can add account connections by selecting **Add an Account**. Important [terms and conditions](#) apply. SAP Concur must share information with travel partners as part of connecting your accounts. Select **Enroll** below if you would like to allow these integrations. By enrolling, you agree to these terms and acknowledge that you have reviewed the information on [e-receipts](#) and [data sharing](#).

Step 10: If applicable, add **TSA Secure Flight** information and then click the **Add a Passport** link to add passport details. Enter your passport details. Click the **Add a Visa** link to add visa details. Enter your visa details.

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV

Gender [Required] Male Female
 Date of Birth (mm/dd/yyyy)[Required]
 DHS Redress No.?
 TSA Pre✓ Known Traveler Number?

International Travel: Passports and Visas Go to top

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

I do not have a passport

Add a Passport

Passport Nationality
 Passport Number
 Passport Date Issued (mm/dd/yyyy)
 Passport Expiration (mm/dd/yyyy)

Passport Place Issued (City, State)
 Passport Place Issued (Country/Region)

International Visas + Add a Visa

Step 10: Click the **Credit Cards** link to add your UC Riverside US Bank Travel & Entertainment Card details. After updating your travel preferences, click the **Save** button to save your information.

Updating Request and Expense Settings

Step 1

Request Settings

From the left panel, click the **Request Information** link under **Request Settings** to validate your Employee Group and other details. You cannot make updates to these fields in grey. Next, select your default **Accountability Structure** and the appropriate **Approver ID**, this information will auto-populate on Request Headers.

User Group	Reimbursement Currency	Vendor ID	Payment Option
UCR Employee	US, Dollar	E010359285	EFT
ORG	Division	Department	Accountability Structure
(ORG39) Planning, Budget & Admin	(DIV129) Business & Financial Serv	(D01100) Accounting	2 (D01100) Accounting
Approver ID	Activity	Fund	Function
3			
Col	Type to search by:		
<input checked="" type="radio"/> Text <input type="radio"/> Code			
(Code) Text			
(10009972) Bobbi McCracken			
(10029332) Gerry Bomotti			
BI Manager	Ellis-Suguitan, Asirra (asirra.suguita)		

Expense Settings

From the left panel, click the **Expense Information** link under **Expense Settings** to validate your Employee Group and other details. You cannot make updates to fields in grey. Next, select your default **Accountability Structure** and the appropriate **Approver ID**, this information will auto-populate on Expense Headers.

- Your Information
 - Personal Information
 - Company Information
 - Contact Information
 - Email Addresses
 - Emergency Contact
 - Credit Cards
- Travel Settings
 - Travel Preferences
 - International Travel
 - Frequent-Traveler Programs
- Request Settings
 - Request Information
 - Request Delegates
 - Request Preferences
 - Request Approvers
 - Favorite Attendees
- Expense Settings
 - Expense Information**

Expense Information

Save Cancel

User Group	Reimbursement Currency	Vendor ID	Payment Option
UCR Employee	US, Dollar	E010359285	EFT
ORG	Division	Department	Accountability Structure
(ORG39) Planning, Budget & Admin	(DIV129) Business & Financial Serv	(D01100) Accounting	2 (D01100) Accounting
Approver ID	Activity	Fund	Function
3 (10009972) Bobbi McCracke			
Co		BI Manager	
		Ellis-Suguitan, Asirra (asirra.suguita)	

Type to search by:
 Text Code
(Code) Text
(10009972) Bobbi McCracken
(10029332) Gerry Bomotti

Step 2

Request Settings

Click the **Request Preferences** link to update request preferences, such as email notification settings.

- Your Information
 - Personal Information
 - Company Information
 - Contact Information
 - Email Addresses
 - Emergency Contact
 - Credit Cards
- Travel Settings
 - Travel Preferences
 - International Travel
 - Frequent-Traveler Programs
- Request Settings
 - Request Information
 - Request Delegates
 - Request Preferences**
 - Request Approvers
 - Favorite Attendees

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

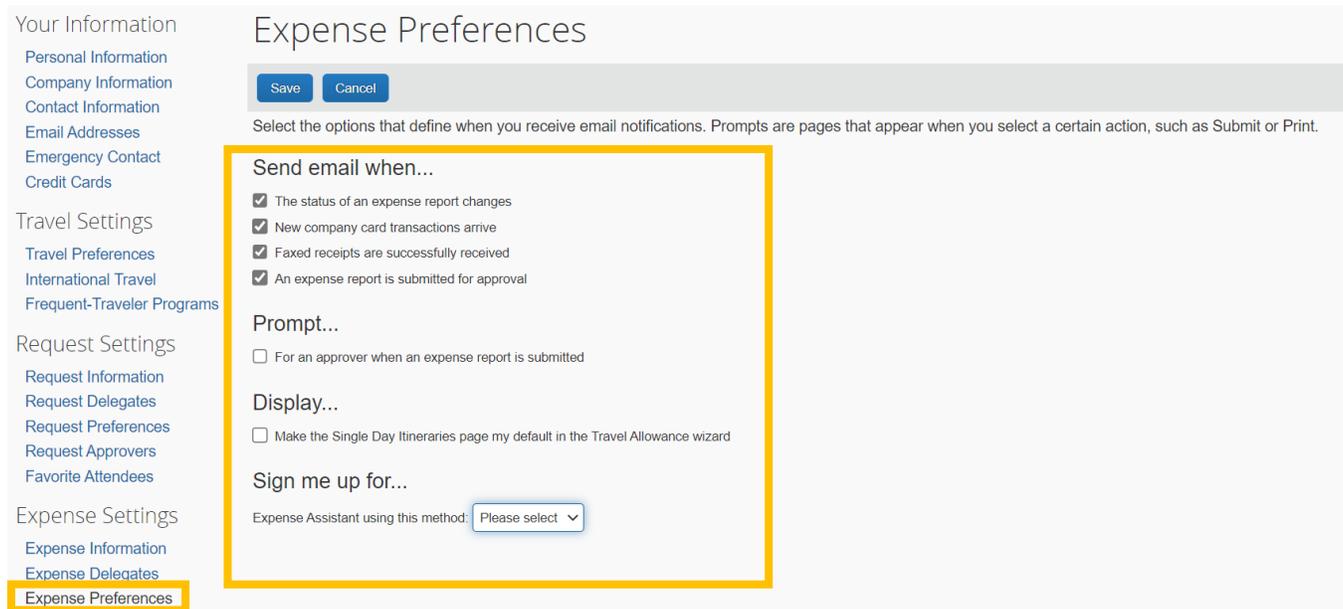
Prompt...

- For an approver when a request is submitted

Expense Settings

Click the **Expense Preferences** link to update preferences for expense reports such as email notification settings. Click the dropdown arrow and select the required option to enable the **expense assistant**.

Notes: Sign me up for... 1) If you select the By Month option, your incoming expenses will be moved directly into your expense reports based on the calendar month. 2) If you select the By Trip option, your incoming expenses will be moved directly into your expense reports based on trip dates. 3) You can also disable the expense assistant by selecting the None option.



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences**

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 an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval

Prompt...

- For an approver when an expense report is submitted

Display...

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

Sign me up for...

Expense Assistant using this method:

Step 3

Request Settings

Click the **Request Approvers** link to view the default approver for your Requests.

Note: You can only view the default approvers for your travel requests. You cannot make any updates to this field.

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers

Request Approvers

Save Cancel

Default approver for your Requests

Expense Settings

Click the **Expense Approvers** link to view your budget manager and default approver for your expense reports and cash advance requests.

Note: You can only view default approvers for your expense reports. You cannot make any updates to this field.

Expense Approvers

Save Cancel

Default approver for your expense reports.

Default approver 2 for your expense reports.

Default approver for your cash advance requests.

Updating System Settings

Step 1: Click the **E-Receipt Activation** link option under **Other Settings** to enable e-receipts. E-Receipts are not activated until the Disable link is visible.

The screenshot displays the SAP Concur user interface for 'E-Receipt Activation'. On the left, a navigation menu lists various settings categories: 'Your Information', 'Travel Settings', 'Request Settings', 'Expense Settings', and 'Other Settings'. 'Other Settings' is highlighted with a yellow box, and 'E-Receipt Activation' is selected within it. The main content area is titled 'E-Receipt Activation' and contains the following text: 'You have enabled e-receipts from participating partners to sync with your SAP Concur account. You may disable this functionality at any time. If you disable this setting, SAP Concur will no longer request e-receipts from these partners.' Below this, a note states: 'Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator.' A 'Disable' button is visible at the end of the note, highlighted with a yellow box.

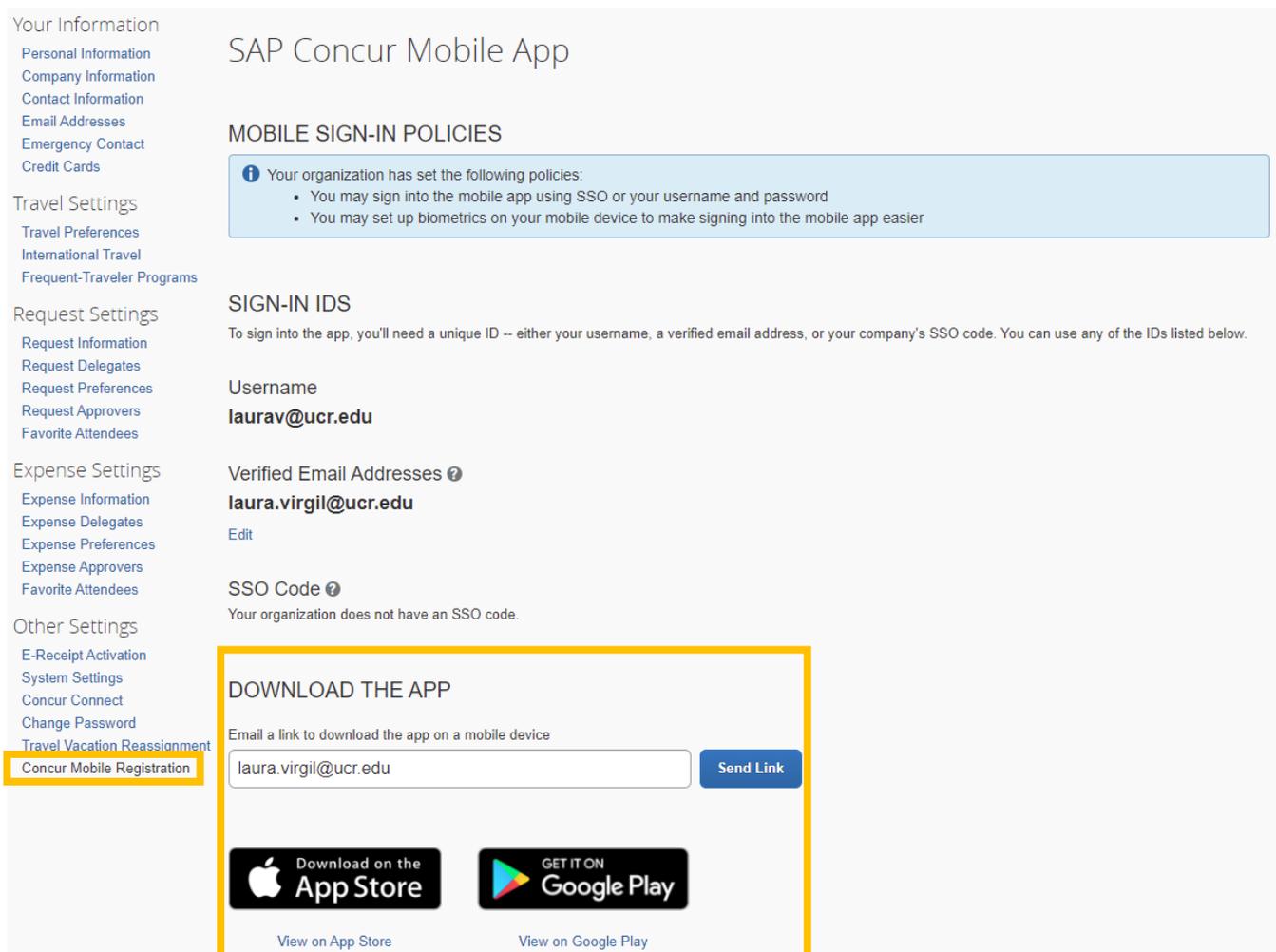
Step 2: Click the **System Settings** link option to review and update language and calendar settings. Validate the **regional, language, calendar, and email notification** settings and make any updates (if needed).

Note: Click the **Save** button to save the updates made.

Step 3: Click the **Concur Mobile Registration** link option to download the Concur app on a mobile device. Once you have installed the Concur mobile app on your device, watch the [Learning to Use Expenselt](#) training.

Note: Expenselt features include:

- Capture receipts and create expense line items with Expenselt using your smartphone.
- Expenselt predicts and identifies the amount, currency, date, location, expense type, payment type, vendor, and hotel itemizations, and then creates an expense based on this information.
- It makes submitting receipts, creating expense reports, and getting reimbursed quicker and easier.



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

Other Settings

- E-Receipt Activation
- System Settings
- Concur Connect
- Change Password
- Travel Vacation Reassignment
- Concur Mobile Registration**

SAP Concur Mobile App

MOBILE SIGN-IN POLICIES

Your organization has set the following policies:

- You may sign into the mobile app using SSO or your username and password
- You may set up biometrics on your mobile device to make signing into the mobile app easier

SIGN-IN IDS

To sign into the app, you'll need a unique ID -- either your username, a verified email address, or your company's SSO code. You can use any of the IDs listed below.

Username
laurav@ucr.edu

Verified Email Addresses 
laura.virgil@ucr.edu

Edit

SSO Code 
Your organization does not have an SSO code.

DOWNLOAD THE APP

Email a link to download the app on a mobile device

[View on App Store](#) [View on Google Play](#)