



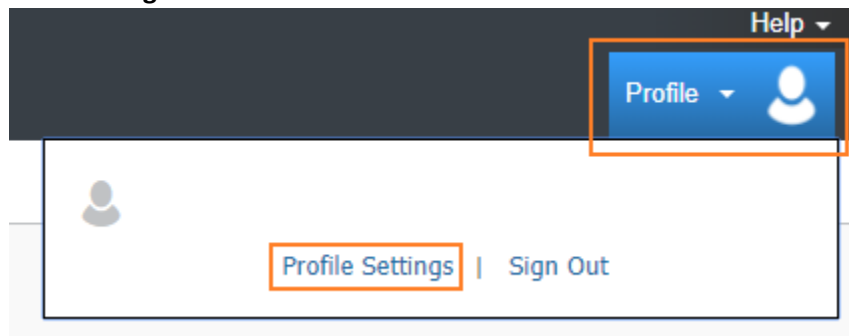
## Objective

The purpose of this document is to guide Concur users through the process of setting up a travel profile. A travel profile is required in order to book travel in Concur. This document will outline the following:

1. Navigate to Profile
2. Auto-populated Fields
3. Required Fields
4. Adding Travel Assistants and Arrangers

## Navigate to Profile

1. After logging into [Concur](#) with your OHIO ID and password, click the **Profile** box in the top right corner and then click **Profile Settings**.



2. This will take you to the Profile Options Page. This page provides an outline of each section in your profile. Click **Personal Information** to get started.

### Profile Options

Select one of the following to customize your user profile.


- Personal Information**  
Your home address and emergency contact information.
- Company Information**  
Your company name and business address or your remote location address.
- Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**  
Going to be out of the office? Configure your backup travel manager.
- Expense Preferences**  
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.
- Concur Mobile Registration**  
Set up access to Concur on your mobile device.
- System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**  
How can we contact you about your travel arrangements?
- Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.
- Company Car**  
Company Car

# Concur Travel Profile Set -up

## Auto-populated Fields

The following fields will be auto-populated and cannot be changed or updated in Concur. These fields are populated in Concur from your HR record in Oracle:

- First Name
- Middle Name
- Last Name
- Suffix
- Employee ID
- Manager
- Employee Position/Title

 **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	Nickname	Last Name	Suffix
<input type="text"/>	<input type="text" value="Leigh"/>	<input type="text" value="Anne"/>	<input type="text"/>	<input type="text" value="Casal"/>	<input type="text"/>

**Company Information** Go to top

Employee ID

Manager  Org. Unit/Division  Employee Position/Title

If First Name, Middle Name, and Last Name do not match what is listed on the photo identification you would present at the time of travel (e.g. at the airport), contact the [Employee Service Center](#) at 740.593.1636 and tell them your name in the system does not match your ID and you need it changed for travel purposes.

# Concur Travel Profile Set -up

## Required Fields

In order to book travel, you will need to update the following fields in your profile:

1. Work Phone OR Home Phone in the Contact Information section. You do not need to fill out both Work Phone and Home Phone. Add the number you would like to be contacted regarding your travel arrangements in case of delays, cancellations, etc.

Contact Information Go to top

Work Phone [Required\*\*] (740) 593-1893 Work Extension Work Fax 2nd Work Phone/Remote Office

Home Phone [Required\*\*]

Pager 740 593-1893 Other Phone

Mobile Phone Country/Region Mobile Phone

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

**Save**

## 2. TSA Secure Flight Details

- Gender
- Date of Birth
- International Travel: Passports and Visas
  - Add Passport or Visa Info OR select “I do not have a passport”

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](http://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 the agency to include it in your reservations. Having this information in your reservation can expedite your check in for international travel.

**Passports**

I do not have a passport

**Add a Passport**

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

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

International Visas + Add a Visa

**Save**

**NOTE:** You can update this information at any time so if you do not have your passport handy, select “I do not have a passport” and update details at a later date, but be sure to update prior to booking international travel. For details regarding Concur data security and privacy: <https://www.concur.com/en-us/processor-privacy-statement>.

3. Click **Save** after each section otherwise your edits will not be saved.

# Concur Travel Profile Set -up

## Adding Travel Arrangers and Assistants

To simplify the booking process, you can give individuals permission to book travel for you. This is not required.

1. In the Assistants and Travel Arrangers section of your profile, click **Add an Assistant**.

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers + Add an Assistant

You currently have no assistants defined.

[Save](#)

2. Type the individual's name and select the correct person from the list. From here, select the appropriate check box (either make them your primary travel assistant or give them permission to book travel).

Add an Assistant - Google Chrome

https://www.concursolutions.com/profile/AssistantE...

### Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Frisbey-Roll, Stephanie L.

Can book travel for me

Is my primary assistant for travel\*

\*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

[Save](#) [Cancel](#)

*NOTE: If you select primary assistant, both boxes will automatically be checked. If the user has not added a phone number, the primary assistant box will be greyed you and you will not be able to click it. You can only have 1 primary assistant for travel.*

3. Click **Save**.