

What to do before you start using Concur

3 things to do before you start using Concur

Step 1: Go to PASS and login to Concur

If you are not set up as a user, you will need to use the self-registration page to create your account.

Step 2: Go to Concur Website

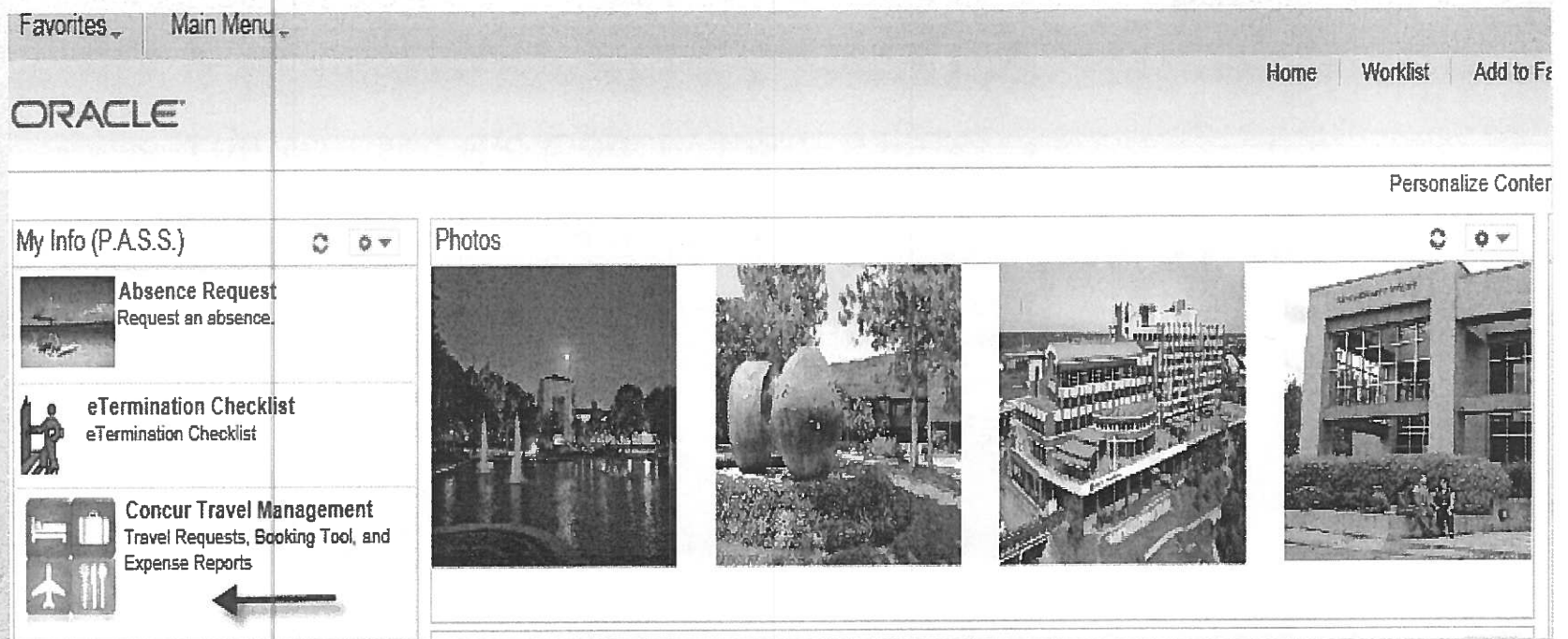
(www.concursolutions.com) and get your password

This is the password you use when you login to Concur through Concur website.

Step 3: Go to your travel profile and update your profile

Step 1: Login to PASS and ensure you are set up as a Concur user.

-> In PASS, click on “Concur Travel Management”




->If you are not set up as a Concur user, you will see the self-registration page. Complete the information highlighted below and click on “Save”.

Personal Information				
User ID	XXXXXX			
First Name	Linda	Middle Name		
Last Name	Traveler			
Date of Birth	01/01/1950			
Login_ID	ltraveler@uh.edu			
Email ID	ltraveler@uh.edu			

Type of traveler	
Supervisor Empl ID	XXXXXXX
Supervisor	Kevin
Are you an expense approver?	<input type="radio"/> Yes <input checked="" type="radio"/> No

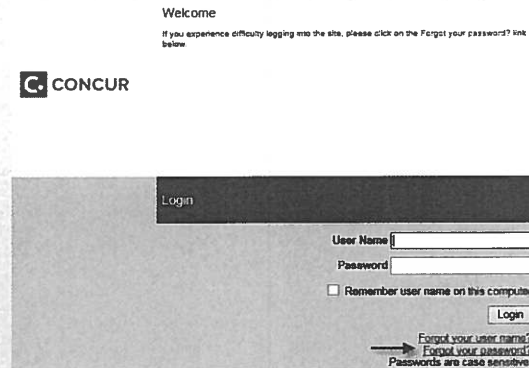
Default Cost Center(Optional)				
Business Unit	Fund Code	Department	Program	Project
00730	2080	H0160	F0626	NA

 Save

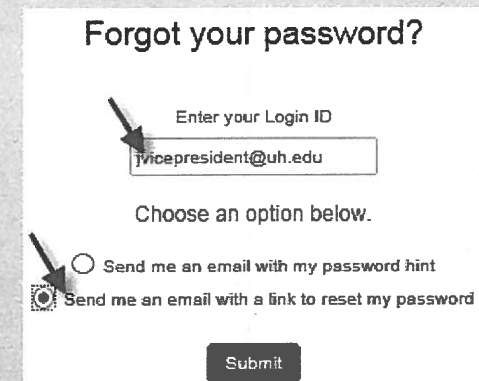
Step 2: Go to <https://www.concursolutions.com> (Concur website) and set your password.

You will use this password if you login to Concur via Concur website.

-> Click on “Forgot your password?”.

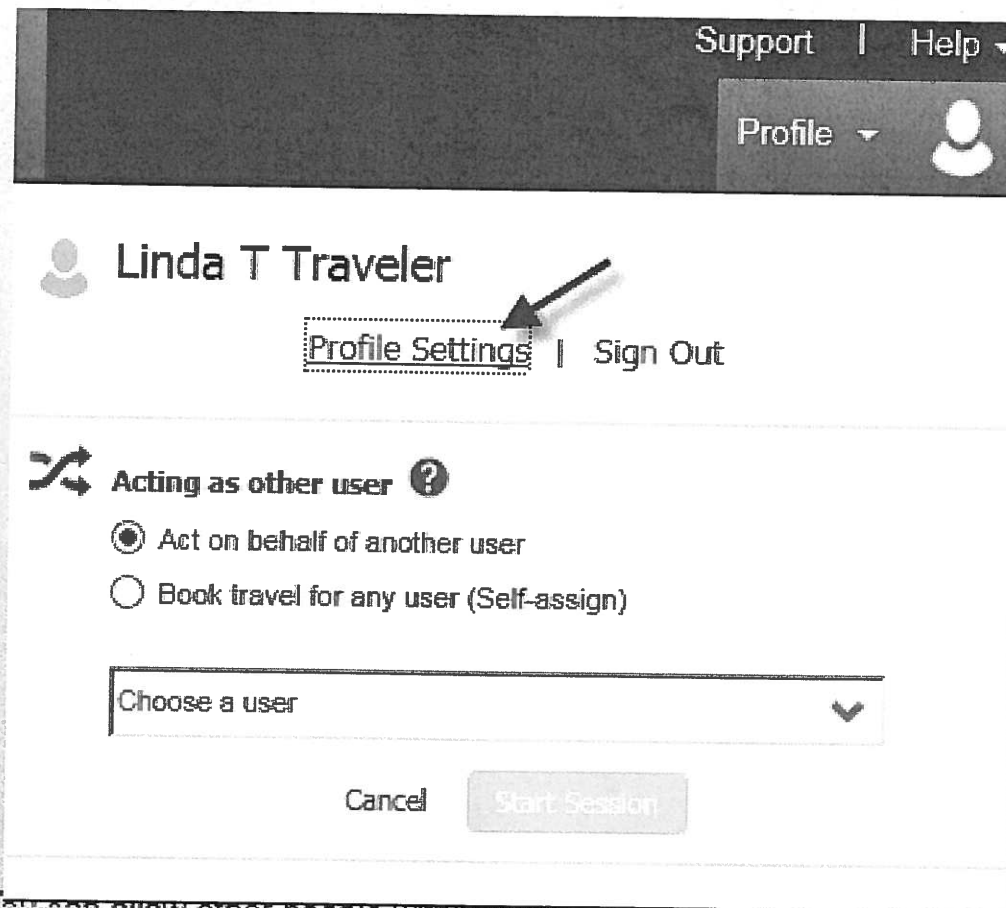


-> Enter and submit your Login ID (UH alias e-mail address). You will receive a link to set your password.



Step 3: Login to Concur and update the travel profile

First, login to Concur, click on “Profile, and select “Profile Settings”.



The screenshot shows the Concur user interface. At the top right, there is a dark navigation bar with links for "Support" and "Help". Below this, a "Profile" dropdown menu is open, displaying the user's name "Linda T Traveler" next to a person icon. Below the name, there are two options: "Profile Settings" (which is highlighted with a dashed border and has an arrow pointing to it) and "Sign Out". Below the profile menu, there is a section titled "Acting as other user" with a question mark icon. This section contains two radio button options: "Act on behalf of another user" (which is selected) and "Book travel for any user (Self-assign)". Below these options is a dropdown menu labeled "Choose a user" with a downward arrow. At the bottom of the profile menu, there are two buttons: "Cancel" and "Start Session".

Support | Help ▾

Profile ▾

Linda T Traveler

Profile Settings | Sign Out

Acting as other user ?


☒ Act on behalf of another user

☐ Book travel for any user (Self-assign)

Choose a user ▾

Cancel Start Session

This is the Profile Options page where you can update some of your profile.

 **CONCUR**

Requests


Travel

Expense

Reporting ▾

App Center

Support | Help ▾

Profile ▾ 

Profile

Personal Information

Change Password

System Settings

Mobile Registration

Your Information

Personal Information

Company Information

Contact Information

Email Addresses

Emergency Contact

Credit Cards

Travel Settings

Travel Preferences

International Travel

Frequent-Traveler Programs

Assistants/Arrangers

Request Settings

Request Information

Request Delegates

Request Preferences

Request Approvers

Favorite Attendees

Expense Settings

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.

Expense Delegates ←
Delegates are employees who are allowed to perform work on behalf of other employees.

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.

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.

Request 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.

Change Password
Change your password.