

Set up Profile

Situation: Individual will be using Concur for Expense Reimbursements and Travel Bookings

Step One: Log into Concur

Option 1 – Direct link: <https://medley.isc-seo.upenn.edu/authentication/profile/concur?app=concurprod>

Option 2 – Path: Penn Faculty & Staff Page, bottom right under Travel, Concur Travel and Expense

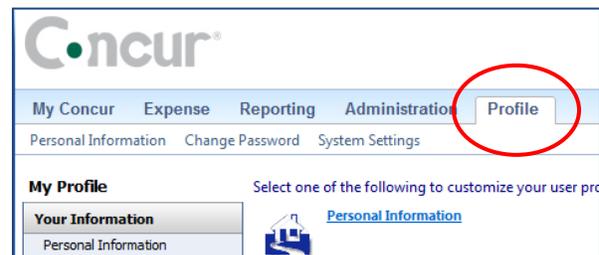
Step Two: Activate eReceipts

At the top of page, immediately under the tool bar, look for the eReceipts notice. Proceed to activate.

You can say “no” to Triplt to remove it from your screen.

Step Three: Update Profile

- Click Profile Tab
- Click Personal Information
- Verify that your name is how you want it to appear on your airline tickets – matching either your driver’s license or passport exactly
- Proceed down the page, filling in the information. Make sure to include phone numbers and email addresses. These are used by World Travel to contact you if your flight has been cancelled or rebooking is necessary. (You can include an assistant’s email address so that they receive itineraries and other information automatically.)
- If you intend to use Concur on your mobile device to take pictures of receipts:
 - Proceed through the verification process listed under the email address section
 - Create a pin under the Mobile registration section
 - Download the app – if you plan to do Travel Booking or Expense Report creation, submittal or approval using your mobile device
 - Note: Complete step by step directions are available under the Training Materials section of the Penn TEM website



- Add Frequent Travel Programs to automatically attach your frequency number to any reservations made, eliminating the need to carry your frequency program cards.
- Add TSA Secure Flight Information (required for any air travel)

Frequent-Traveler Programs	
Your Frequent Traveler, Driver, and Hotel Guest Programs	
	American AA Advantage
	Delta SkyMiles
	Southwest Rapid Rewards
	United Mileage Plus
	US Airways Dividend Miles

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. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, click here.	
Gender [Required]	Date of Birth (mm/dd/yyyy) [Required]
<input type="radio"/> Male <input checked="" type="radio"/> Female	01/22/1955
DHS Redress No.	TSA Pre✓ Known Traveler Number

Step Four: Add Credit Cards (personal)

If you will want to use your personal credit card to book travel, you can enter your card number and information in the last section of the Profile screen. It is entirely secured, with the number immediately encrypted upon entry.

Note: If you have applied for the Penn Travel Card, it will automatically be added to the system when your first transaction feeds into Concur. You will not have to load it manually in this section.

Step Five: Assign Assistant or Travel Arranger (optional)

An assistant can book travel on behalf of another. You can have more than one assistant.

Step Six: Assign Expense Delegate (optional)

An expense delegate has the ability to create expense reports on behalf of another person. The individual must assign that delegate to their account, and authorize the activities that they can perform. You can have more than one delegate.

- In the left hand margin, select **Expense Delegates**

- Click the **Add** button
- Use the Search field to find the person you wish to assign as your delegate

- When the name appears, single click on it. Their name will now appear in the box

- Check the boxes that describe the permissions you are giving to the delegate – the activities they can do on your behalf. Recommended setup is clicking ‘Can Prepare’, ‘Can Review Receipts’ and ‘Receives Emails’.

Expense Delegates				
<input type="button" value="Add"/>	<input type="button" value="Save"/>	<input type="button" value="Delete"/>		
Delegates are employees who are allowed to perform work on behalf of other employees				
<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	EASLEY, HILARY easleyh@upenn.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- SAVE
- Logout of Concur