

## Accessing and Updating Your Travel Profile

### Overview

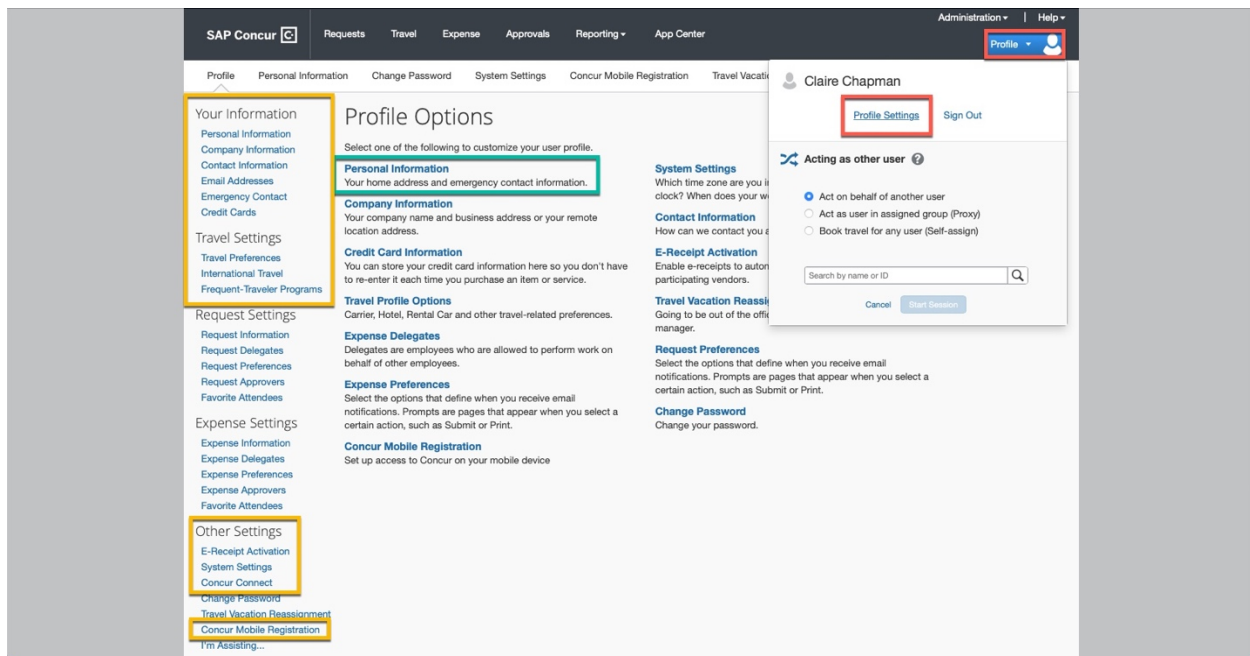
This training guide walks you through accessing and updating your Concur Travel Profile. **Before** you use the Concur Travel booking tool for the first time, you **MUST** update your Travel Profile. The required fields will be notated in **red** in Concur.

Concur can be accessed through CU SSO by typing [concur.app.clemson.edu](http://concur.app.clemson.edu) into the address bar of your internet browser window.

### Step One:

Open the Profile Options page.

1. From the Concur Home Page select **Profile > Profile Settings**.
2. The **Profile Options** page appears.
3. You can update specific sections of your profile from the individual links provided under the Profile Options heading or use the menus on the left to select a section to update.
4. To review/update your entire Profile select **Personal Information**.



The remaining STEPS walk through each section within the Profile.

### Step Two:

The first section of the Profile contains a *Jump To*: dropdown for quick access to the various sections within the profile and your **NAME**.

## My Profile - Personal Information

Jump To:

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
<input type="text"/>	<input type="text" value="Claire"/>	<input type="text" value="Aline"/>	<input type="text"/>	<input type="text" value="Chapman"/>	<input type="text"/>

- Verify that the first, middle, and last names shown are identical to those on the photo identification that you will be presenting at the airport.
  - If a correction needs to be made, please contact HR at (864) 656-2000.

### Step Three:

The Company Information section contains:

- Employee ID
- Manager
- Employee Position/Title

#### Company Information

Employee ID

Manager  Org. Unit/Division  Employee Position/Title

Department Number:  Department Name:

### Step Four:

The Work Address section contains:

- Company Name
- Assigned Location
- Address

#### Work Address

Company Name  Assigned Location

Street   Address same as assigned location

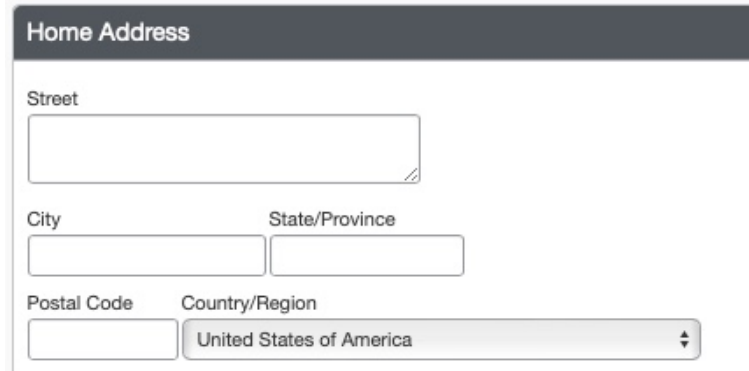
City  State/Province

Postal Code  Country/Region

### Step Five:

The Home Address section contains:

- Home Address: not required but helpful information for AT if you request assistance to have missing bags shipped to your home.



Home Address

Street

City State/Province

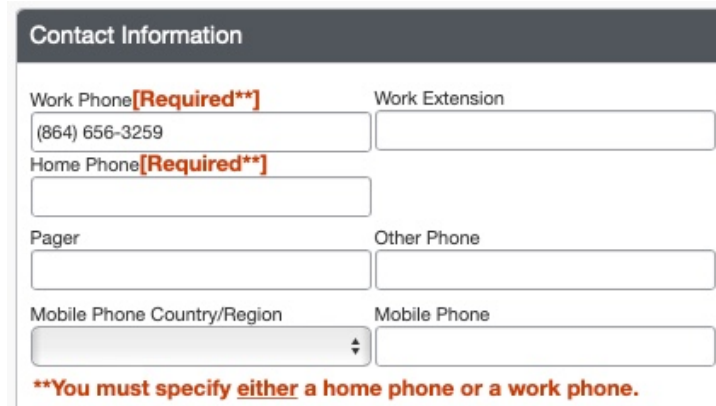
Postal Code Country/Region

United States of America

### Step Six:

The Contact Information section contains:

- Phone number – You are required to specify one number in either the Work or Home Phone field. The number you provide will be the number an airline will attempt to contact you at in the case of an emergency.
- Mobile Phone – Please enter your Mobile Phone Country/Region and Mobile Phone Number, even if you entered it already in the Work Phone cell.



Contact Information

Work Phone [Required\*\*] Work Extension

(864) 656-3259

Home Phone [Required\*\*]

Pager Other Phone

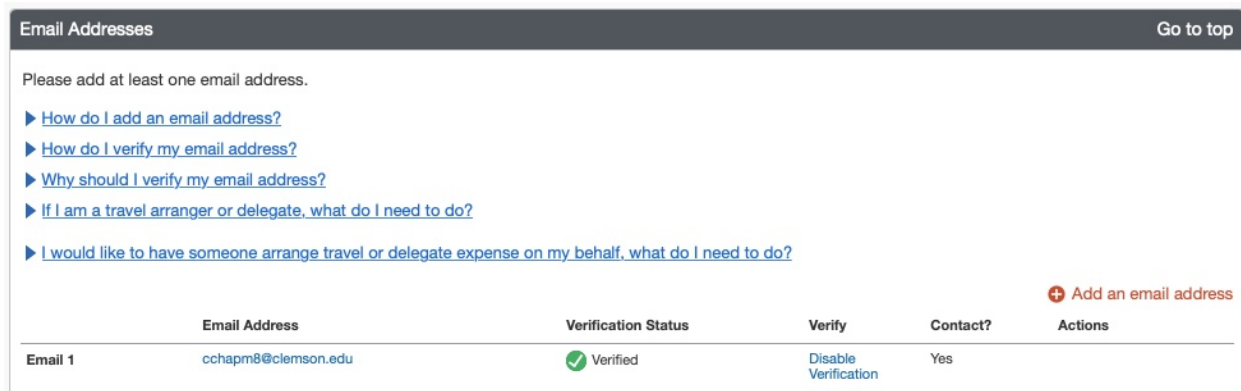
Mobile Phone Country/Region Mobile Phone

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

### Step Seven:

The Email Addresses section contains:

- Email Addresses – Your CU Email Address should already be populated in this area. You will need to **Verify** it. You can also + **Add an Email Address** as needed.



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	Verified	<a href="#">Disable Verification</a>	Yes	

1. By **verifying your CU Email address**, you are giving Concur the ability to associate information forwarded from that Email address, the Concur Mobile apps, or the apps of Concur partners (such as Uber, Parking Spot, etc.) to your Concur account.
  - a. On you CU email address, select **Verify**.
  - b. Check your email for a verification message from Concur.
  - c. **Copy the code** from the email and **paste into the Enter Code field** next to the email address back in the Concur profile – email addresses section.
  - d. Select **OK** to submit the code and complete verification. Your email will now show as verified in green.

**Note:** With your verified email you can also forward receipt emails to [receipts@expenseit.com](mailto:receipts@expenseit.com) to have the receipt uploaded directly into your Available Receipts in Concur.

**Step Eight:**

The Emergency Contact section contains:

- Emergency Contact – The individual you list here will be contacted in the event of an emergency if you cannot be reached.

**Step Nine:**

The Travel Preferences section contains:

- Eligible Discount Rate/Fare Classes – By checking those that apply to you, the system will include the applicable discount rates/fare classes. You must have a card to present for proof of eligibility if requested by vendor.

- Air, Hotel, and Car Rental Preferences – The system will automatically apply saved preferences to your bookings and reservations.
  - **Note:** Adding preferences will limit your search results accordingly when booking travel. For example, if you choose Aisle under Seat preference, your search results would not return any flights where an aisle seat is not available.

**Air Travel Preferences**

Seat: Don't Care | Seat Section: Don't Care | Special Meals: Regular Meal | Ticket Delivery: E-ticket when possible

Preferred Departure Airport: | Other Air Travel Preferences: | Medical Alerts:

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**Hotel Preferences**

Room Type: Don't Care | Smoking Preference: Don't Care | Foam pillows:  | Rollaway bed:  | Crib:  | Message to Hotel Vendor:

I prefer hotel that has:  
 a gym |  a pool |  a restaurant |  room service |  Early Check-in

Accessibility Needs  
 Wheelchair access |  Blind accessible

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**Car Rental Preferences**

Car Type: Any Car Class | Smoking Preference: Don't Care | Car Transmission: Don't Care | In-car GPS system:

Message to Car Rental Vendor:

- Frequent Traveler Programs – One benefit with Concur is that you are still eligible to receive benefits and accrue your own rewards points on your accounts with various air, hotel, and car travel vendors’ rewards programs. Please ensure the name on your reward program matches your photo ID as well as the name saved in Concur.
  - Select [ + ] **Add a Program**
  - Select the vendor and enter your rewards number or ID (can enter up to five travel vendors at a time).
  - Select Save
  - Repeat as needed.

**Frequent-Traveler Programs**

Your Frequent Traveler, Driver, and Hotel Guest Programs + Add a Program

Carrier	Program Name	Search this vendor	Account ID	Actions
American Airlines	American Airlines AA Advantage	Search this vendor	[REDACTED]	
DELTA	Delta SkyMiles	Search this vendor	[REDACTED]	
Southwest	Southwest Rapid Rewards	Search this vendor	[REDACTED]	
Hertz	Hertz Hertz Gold Plus Rewards	Search this vendor	[REDACTED]	
Hilton	Hilton (All) (EH) Hilton HHonors	Search this vendor	[REDACTED]	

- Unused Tickets and Southwest Ticket Credits – Credits for canceled flights that were booked in Concur are automatically saved and appear here for easy tracking until applied to a future ticket purchase. Concur will email reminders when credits are about to expire as well as remind you of unused credits while booking.

**Unused Tickets**

You have the following unused tickets in the reservation system.

Carrier	Ticket Number	Credit	Expiration Date	Notes
American Airlines	[REDACTED]	USD405.60	12/31/2021	AA

**Southwest Ticket Credits**

+ Add Ticket Credit

- TSA Secure Flight – contains TSA required and PreCheck information. Make sure these items match your ID.
  - Gender – prepopulated from HR
  - Date of Birth – prepopulated from HR
  - DHS Redress No – if applicable
  - TSA Pre-Check, Known Traveler Number, or Global Entry Pass ID – if applicable

### 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

### Step Ten:

The International Travel: Passports and Visa section contains:

- Passports and Visas – Securely store your passport and visa information. This will allow Concur to automatically include the information in your international reservations. Alerts will prompt you when your passport or visa is about to expire.
  - Select [ + ] **Add a Passport** or [ + ] **Add a Visa**
  - Enter the information.

**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** + Add a Passport

I do not have a passport

**International Visas** + Add a Visa



### Step Eleven:

The Credit Cards section contains:

- **Credit Cards** – In this section you will add and securely store the card information used to purchase or reserve travel arrangements.

**Credit Cards** Go to top

You currently have the following credit cards saved with your profile. + Add a Credit Card

Card Type	E-Receipt Enabled	Display Name	Sponsored Card	Credit Card Number	Expiration Date	Default	Update/Delete
		Amex		██████████	██████████	<input checked="" type="radio"/>	<a href="#">✎</a> <a href="#">🗑️</a>
		Pcard		██████████	██████████	<input type="radio"/>	<a href="#">✎</a> <a href="#">🗑️</a>

To add card:

1. Select **Add a Credit Card**
2. Fill out the required fields noted with a red asterisk (\*).
3. Your P-Card should be listed here and **ONLY** used for rental cars.
4. Also listed is the Clemson Air Card which is a University account you may **ONLY** use to purchase airfare.
5. Billing Address: For **CU P-Cards** this is most likely your office address.
6. Select **Save**
  - a. Notice all but the last 4 digits of the saved card number are masked for security purposes.
  - b. You can edit or delete a credit card by selecting on the pencil or trashcan icon.

### Add a Credit Card

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction. \* Required

Display Name (e.g., My Corporate Card) *	Your name as it appears on this card *	
<input type="text"/>	<input type="text" value="Michael Nebesky"/>	
Card Type *	Credit Card Number *	Expiration Date *
<input type="text"/>	<input type="text"/>	<input type="text" value="8"/> <input type="text" value="2022"/>

Use this card as the default card for:

Plane Tickets  Car Rentals  Hotel Reservations

### Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate.

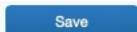
Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street *	<input type="text"/>		<small>Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.</small>
City *	State *	Zip/Postal Code *	
<input type="text"/>	<input type="text" value="None Selected"/>	<input type="text"/>	
Country/Region *			
<input type="text" value="United States of America"/>			

## Step Twelve:

You should now be to the bottom of the **My Profile – Personal Information** page.

1. Select the blue Save button at the bottom of the screen under the Credit Cards section.



2. Make sure you see the Profile Saved message under the Profile dropdown.



**Note:** There are multiple places to Save throughout your Profile page, this is to keep you from having to scroll through the entire page for those times when you are just updating one specific section.

### Step Thirteen:

The Request Delegates and Expense Delegates section can be found on the left-hand side menu bar.

- **Request/Expense Delegate** – In this section, you may select other Concur-profiled CU employees that you would like to give permission to perform actions on your behalf in Concur. You can have multiple delegates, but your liaison should be your primary.
- **To Add a Request/Expense Delegate:**
  - Select **Request Delegates** in the left-hand side menu bar
    - **Note:** When you add a delegate in the Request section it also applies automatically to the Expense section.
  - Click **Add**
  - Search by employee name, email address, or XID
  - Once you have found the correct employee click their name to automatically add them as a delegate.
  - Check the boxes that apply:
    - *Can Prepare* – can prepare reports on your behalf
    - *Can Book Travel* – can book all travel on your behalf
    - *Can View Receipts* – allows the delegate to view and attach receipts
    - *Receives Emails* – recommended if you have a liaison assisting you with charges or approvals
    - *Can Approve* – gives delegate ability to approve reports on behalf of user
    - *Receives Approval Emails* – recommended if you have a liaison assisting you with charges or approvals
  - Click Save when finished

## Request Delegates

Delegates Delegate For

**Add** Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> Patton, Allison APATTON@clemsn.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Pigeon, John JPIGEON@clemsn.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>