



Getting Started in Concur: P-Card Holders

Overview: *To leverage Concur's full functionality, we are asking all Clemson P-Card holders to take a few actions to ensure appropriate set-up and to activate mobile applications associated with the Concur tool. Actions outlined in this document must be completed by the P-Card holder.*

Action 1 – Access Profile Options

Go to **Concur Login** at concur.app.clemson.edu and log in with the SSO link. From the Concur Home Page, close any pop-ups that appear. Select **Profile** and **Profile Settings**.

Action 2 – Validate Name and Work Phone

From **Profile Options**, select **Personal Information**. Validate that the first, middle, and last name populated from HR matches the name on the government issued identification you use. If changes are necessary in the greyed-out section, contact HR and request a name change/correction. Concur does not have the ability to change this – it comes direct from HR. Scroll to **Contact Information** and enter work phone and alternate phone number. Select **Save** to save your changes.

Action 3 – Verify Email

From **Personal Information**, scroll down to **Email Addresses**. Your Clemson email address will be pre-loaded. Select **Verify**. Log into the email account entered and enter the verification code that will be sent. Receipts sent to receipts@expenseit.com with this email address will be linked to the employee's Concur profile.

Action 4 – Credit Card

From **Profile Options**, select **Credit Card Information**. Confirm that the last 4 digits of your P-Card are correct. Select **Add a Credit Card** to enter a personal credit card for expenses not allowed on your P-Card. Only the last four digits of the card will be displayed when working in Concur. Select **Save**.

Action 5 – Assign Delegates to Assist on Your Behalf

From **Profile Settings**, select **Expense Delegates** on the left-hand side menu. Click **Add** and begin searching by Employee Name or Clemson Email. Click the desired name and it will automatically add to the list below. Click the check boxes next to the permissions you would like to assign. The **ONLY** permissions that do not apply are those that say Can Submit. **ONLY** the cardholder can submit.

Optional – Concur Mobile App

Step 1 – Download the Concur Mobile App on Your Phone's App Store

Questions? Contact your Business Officer for specifics to your area. Also visit our new travel site here for training documents and resources or email clemsontravel@clemson.edu.