



Concur Travel and Expense Quick Reference Guide

Overview: To leverage Concur's full functionality, we are asking all Clemson employees 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 employee.

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 SAP matches the name on the government issued identification you use for travel. 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 and travel itineraries booked outside of Concur sent to plans@tripit.com with this email address in the subject line will be linked to the employee's Concur record.

Action 4 – Activate E-receipts

From the **Profile** page, elect **E-Receipt Activation**. Can also access from **Personal Information** by scrolling on the left menu paths. Click **here** to enable e-receipts and agree to the terms of activation.

Please note: This functionality, while not required to use Concur, will greatly simplify how you manage, load and process receipts for various travel expenses.

Action 5 – Frequent-Traveler Programs

From the **Profile** page (or using the left menu), find **Travel Preferences**. If you will be traveling, enter frequent flyer and reward programs for hotels/car rental in **Frequent-Traveler Program**. This information is used to support e-receipting (i.e. less receipts to keep up with). Select **Add a Program**. Once all information is entered, select **Save**. This also allows you as the traveler to continue earning points/miles when booking University business travel.

Action 6 – Credit Card

From **Profile Options**, select **Credit Card Information**. Enter your Clemson P-Card (to be used for P-card allowable travel expenses) and associated work billing address. If you are unsure of your billing address, contact your business office. 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 7 – Concur Mobile App

Step 1 – Download the Concur Mobile App

From **Profile Options**, select **Concur Mobile Registration**. You have the option to enter your email address to receive a link with download instructions which must be opened through email on your mobile phone to download the App. A second option is to download the Concur Mobile App directly from the appropriate App Store. Choose the option that works best for you.

Step 2 – Open the App and sign in with Clemson credentials using the SSO link.

Action 8 – TripItPro Mobile App – Strongly Encouraged for all Travelers

From the Concur Home Page, select the **App Center** tab along the top of the screen. On the App Center page, select the **TripIt app** icon to connect. Create a TripIt Account using your Clemson email address. If you already have a TripIt account, sign in to link accounts. You'll receive an email from TripIt with a verification link. Once you've verified your account, download the mobile app and log in using your Clemson email address and the password you selected. You will automatically be upgraded to TripItPro.

Action 9 – Completing Profile - Delegates

Optional Action – Travel Delegates

If you will be using Concur to book travel, travel delegates can be identified through the profile. Your travel arrangers can book travel on your behalf using the credit card information included in your profile.

To set a **Travel Delegate**, from the **Profile** page (or using the left menu), if others will book travel on your behalf, select **Request Delegates**. Select **Add**. Enter the name of your travel arranger. Select the check box indicating the person can book travel on your behalf. Select **Save**.

Optional Action – Send Email Notifications to Expense Delegates

If an employee would like to copy his/her expense delegate on all Concur email notifications, the employee must indicate that their expense delegates receive email notifications.

To copy expense delegates on email notifications, select **Expense Delegates** on the **Profile Options** page. From the **Expense Delegates** page, select the check box under the **Receives Emails** column for any person listed. Select **Save**.

Questions? Visit our new travel site [here](#) for training documents and resources or email clemsontravel@clemson.edu.