Concur Account Setup
Department of English
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COMPLETE THE FOLLOWING STEPS BEFORE YOUR NEXT TRAVEL REIMBURSEMENT OR OUT OF POCKET REIMBURSEMENT IN CONCUR
SAP Concur, a cloud-based Travel & Expense management software application available to UConn. Concur allows for business travelers to capture their entire trip in one single application, including the following modules:

- **Request**: module used to seek pre-approval for travel.
- **Travel**: Concur’s online booking tool.
- **Expense**: module used to record business expenses – includes out-of-pocket expenses as well as University Card products (Travel Cards)

Expense Report  ➔  Verify  ➔  Reimburse
Important Changes

- You will **NO LONGER** be able to receive reimbursement from simply turning in relevant physical receipts to the main office.

- You have multiple alternatives to turning in your receipts and information, including:
  - Using the receipt upload function on the Concur Mobile App (instructions to install this are in this presentation)
  - Emailing copies of receipts to receipts@expenseit.com. If you verified your email as instructed, Concur will automatically add any attached receipts to your account.

- **ALL** out of pocket expenses will be reimbursed through Concur, not through KFS, whether they are related to travel or not.
  - Out of pocket expenses include books, memberships, subscriptions, and meals pertaining to university functions paid out of pocket

- Instructions on how to complete these functions will be available at the department website.
Quick Tip: Split Screen

This slideshow is a step by step instruction on setting up your profile in Concur. It is HIGHLY recommended that you split your screen between this Powerpoint and the website so you can follow along.
Resources

- Any questions or concerns, contact travel@uconn.edu
- Travel Project Website: https://travel.uconn.edu
- Extensive Training Materials can be found here:
  - https://concurproject.uconn.edu/training-documentation-and-user-guides/#
Accessing Concur

- Accessing the Concur system is directly on the home page of https://travel.uconn.edu
Part 1: Setting Up Your Profile

- Some missing information must be filled out when you first gain access to Concur.
- Go to Profile -> Profile Settings at the top right corner of the page.
Part 1: Setting Up Your Profile

At the Profile Options Page, select Personal Information to take you to your information page.
This is where all of your basic personal information lies. A few pieces of information will already be filled in for you, but you will need to fill out some of the information.

Enter your Middle Name in the field highlighted as it is shown on your legal IDs (driver’s license, passport, etc). If you do not have one, check the box underneath the field titled No Middle Name.

Confirm that the pre-listed information matches your legal ID(s)
Part 1: Setting Up Your Profile

- Continue scrolling through this personal information page. Enter your **Work Phone Number** and **Home Phone** in the highlighted fields. All other fields in this screenshot are optional.
Part 1: Setting Up Your Profile

- Scrolling down further on that same page, select your Gender and Date of Birth in the highlighted fields.
- ***DO NOT*** enter any personal credit card information or passport information at this time.
- Once all of these items have been filled on the page, click on Save so that this information can be saved.
Scroll back up to the section on that page titled **Email Addresses**. Your UConn email should be listed with the verification status **Not Verified**.

Select **Verify**. When you do, a field will appear to enter a code. This code will be sent to the email address listed. When you receive it, enter the code on this page where provided.

This allows the system to connect your account to your email address, making the process of uploading paper and electronic receipts much easier.
PART ONE COMPLETE

RETURN NOW TO THE MAIN PAGE ON TRAVEL.UCONN.EDU
Part 2: Apply for a Travel Card

- Access the **Travel Card** section of [https://travel.uconn.edu](https://travel.uconn.edu). You will now need to apply for a travel card for future travel reimbursement.
Part 2: Apply for a Travel Card

- On the Travel Services page, start by going to **Travel Card Request** to submit a request for a new Travel Card.
Part 2: Apply for a Travel Card

- After signing in with your NetID and password, complete the travel card request form and submit it.
Part 2: Apply for a Travel Card

- Once completed, return to the travel card page [https://travel.uconn.edu/travel-card/](https://travel.uconn.edu/travel-card/)
- Select **Travel Card Training**. You will need to enroll in and complete this training session in order to use your card.
Part 2: Apply for a Travel Card

- Sign in with your NetID and password, select **Enroll** and complete the 12 minute training session at your earliest convenience.
PART TWO COMPLETE

RETURN NOW TO THE MAIN PAGE ON TRAVEL.UCONN.EDU AND SELECT “CONCUR TRAVEL & EXPENSE”
Part 3: Download the Concur App

- Return to Profile -> Profile Settings.
- At the Profile Options Page, select Concur Mobile Registration at the top banner.
Part 3: Download the Concur App

Confirm that your UConn email is listed and select Get Started. This will send an email to you.
Part 3: Download the Concur App

- Open this email sent to you on your mobile device. Click on the link that states **Tap here to install Concur Mobile**
- After downloading, select the link to **Create a Concur Mobile PIN**
- Choose a 4-digit PIN and enter it in the boxes provided.
- You will now be able to use the app for future travel!