Columbia University Finance Training

Training Guide: Setting up Your Concur Profile for Expense (Only) Users

Your Concur Profile stores personal information used for creating expense reports. Upon initial log in to Concur, you should verify and update your Profile. You can update your personal information, departmental information, default ChartFields, and email addresses. In addition, you can name Delegates to prepare Requests and Expense Reports on your behalf.

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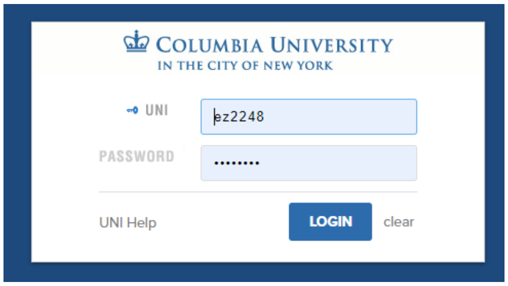
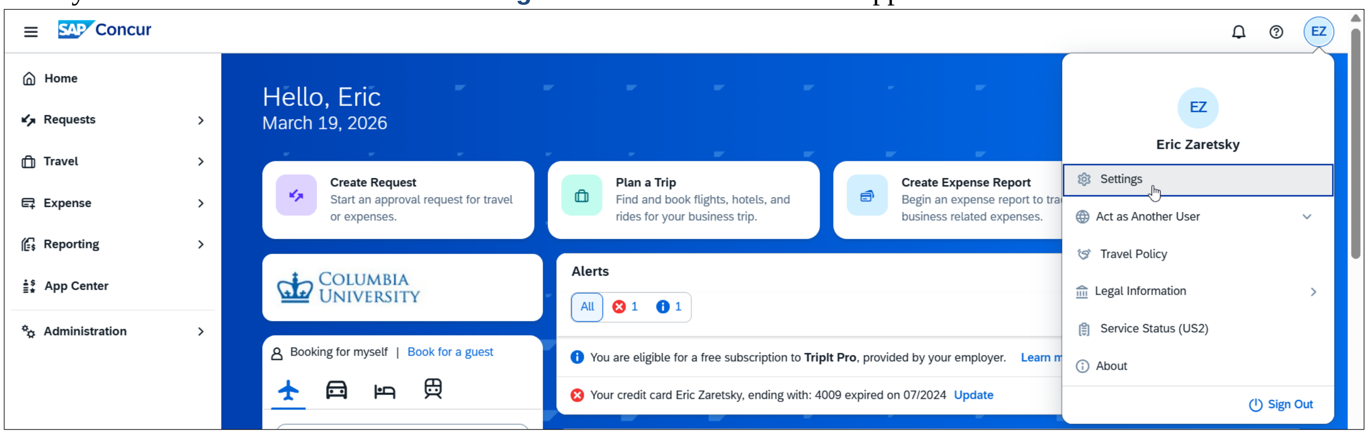
Logging in to Concur and Accessing Your Profile Settings

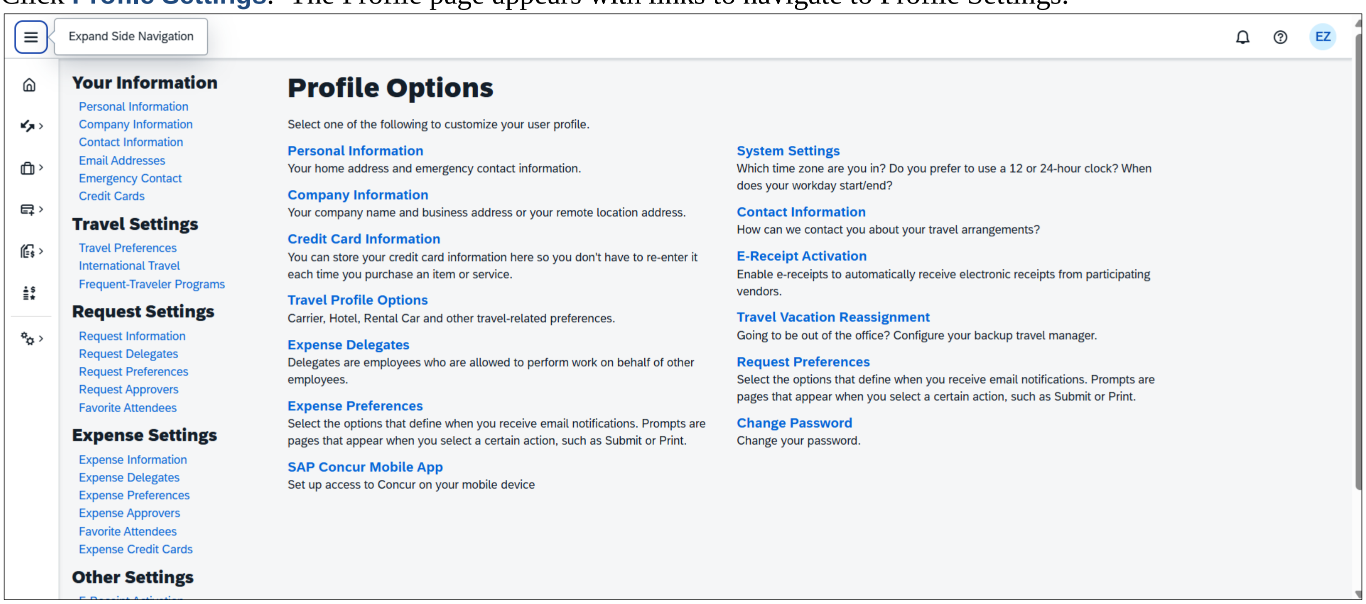
1. Access Concur from the Columbia Travel and Expense Portal.



2. Enter your **UNI** and **Password** and click **Login**. Your Concur dashboard appears.

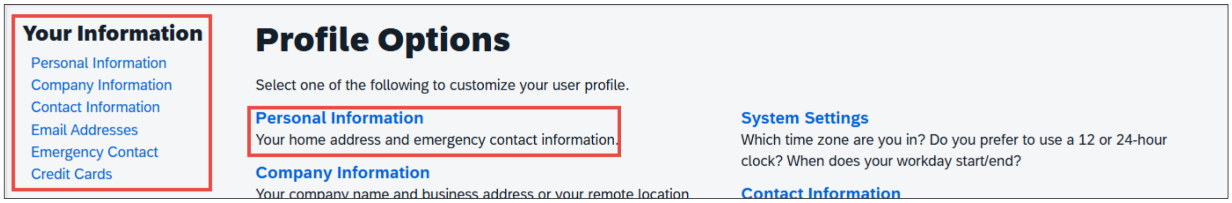


3. Click **Profile** on the top right of your screen.
4. Click **Profile Settings**. The Profile page appears with links to navigate to Profile Settings.



Updating Required Information

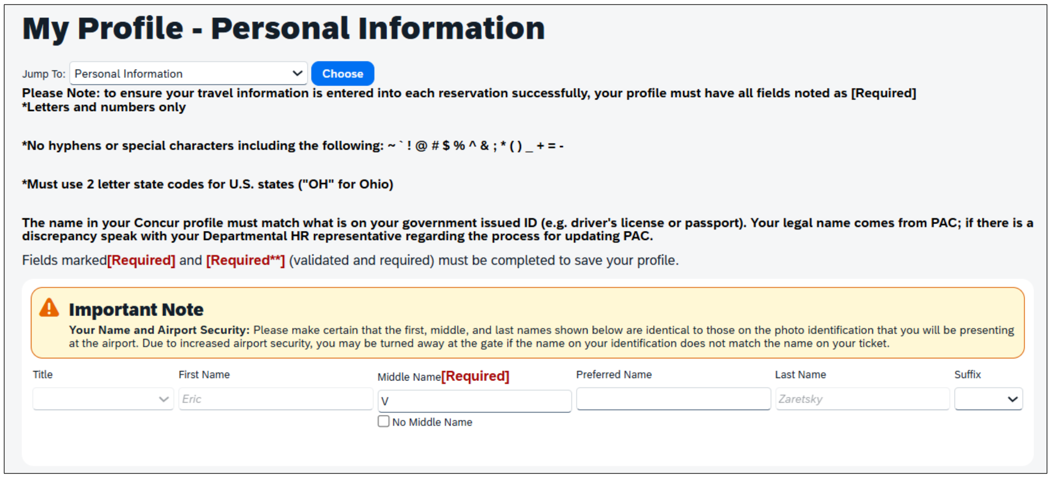
You will find the most common profile tasks on the **Profile Options** page. You can also use the menus on the left to select a setting to update.



Click the **Personal Information** link from the left menu or the Profile Options. The Your Information page appears. You can also scroll to sections for Company Information, Contact Information and Email Address on this page. You cannot click Save until all required fields are complete.

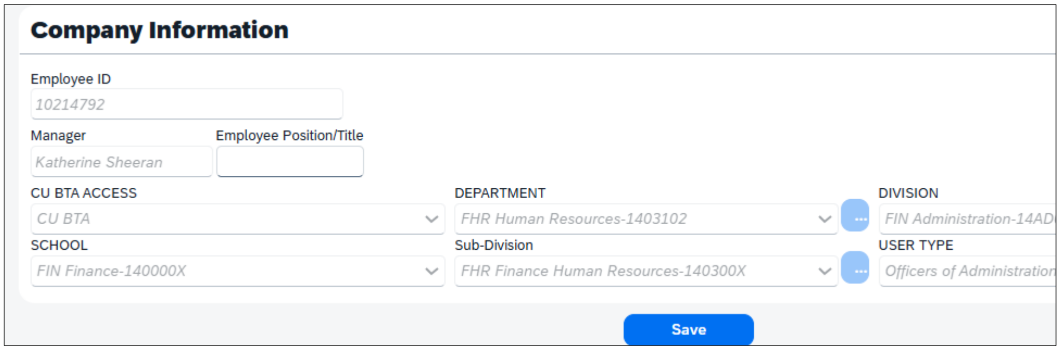
Confirming Your Name

Your name appears as it would in the PAC system. If there is a discrepancy, speak with your Departmental HR representative regarding the process for updating PAC.



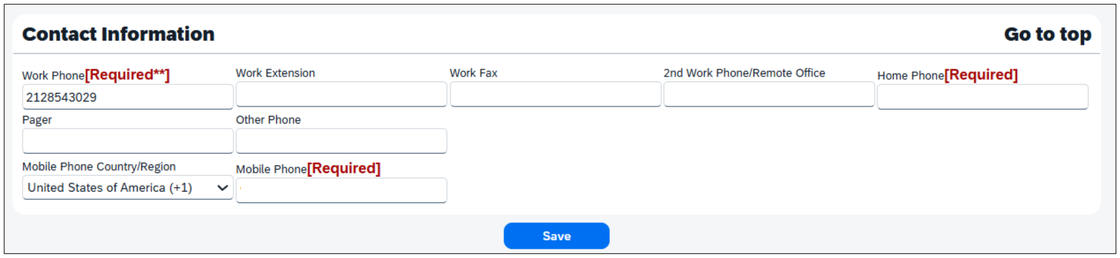
Your Middle Name will not be populated from PAC and can only be added if you have access to Concur Travel. Your Middle Name is not required if you have Expense Only access in Concur.

Confirming Company Information



Your **Company Information**, which is associated with your paycheck information, will be automatically populated. If there is a discrepancy, speak with your Departmental HR representative regarding the issue.

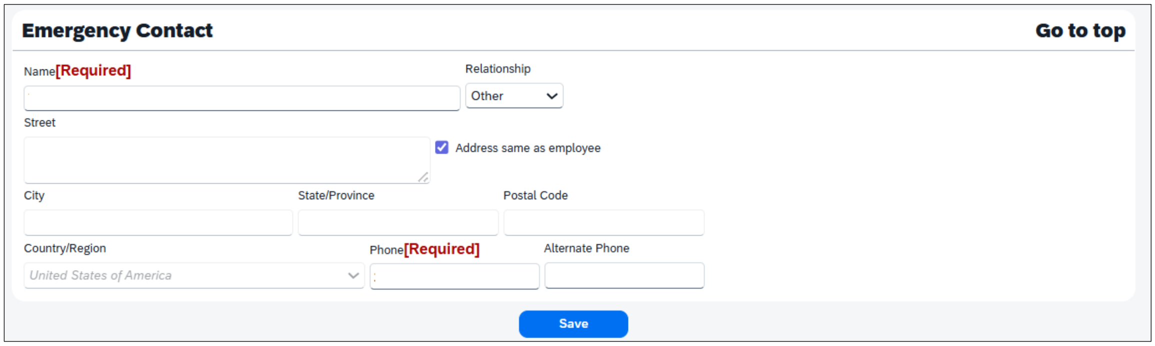
Entering Contact Information



Complete either the **Work Phone** **OR** **Home Phone** fields (only one is required). The 'Required' label does not change if you complete one field and not the other.

After you have completed all required fields, click **Save**.

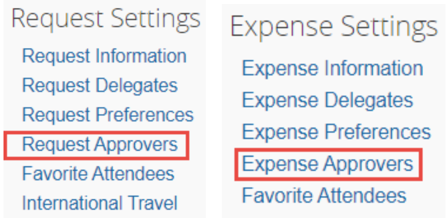
Entering an Emergency Contact



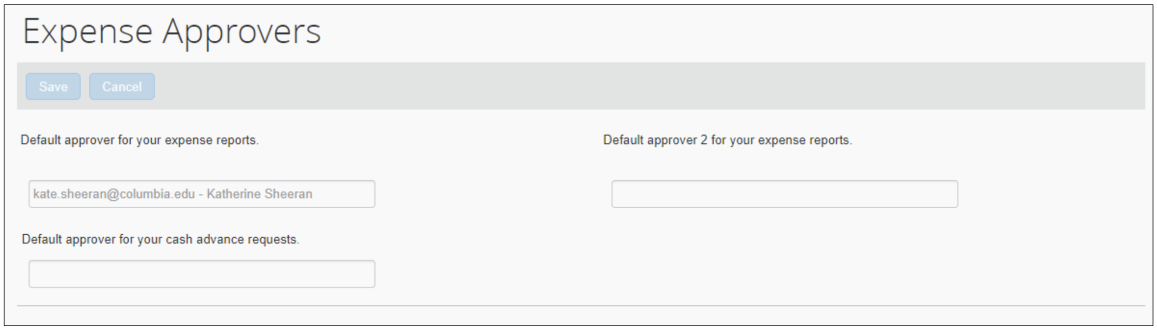
Scroll down to the **Emergency Contact** section to complete the required fields. Click **Save** when complete.

Confirming Default Approver

Navigate to **Request Approvers** or **Expense Approvers** from the menu on the left



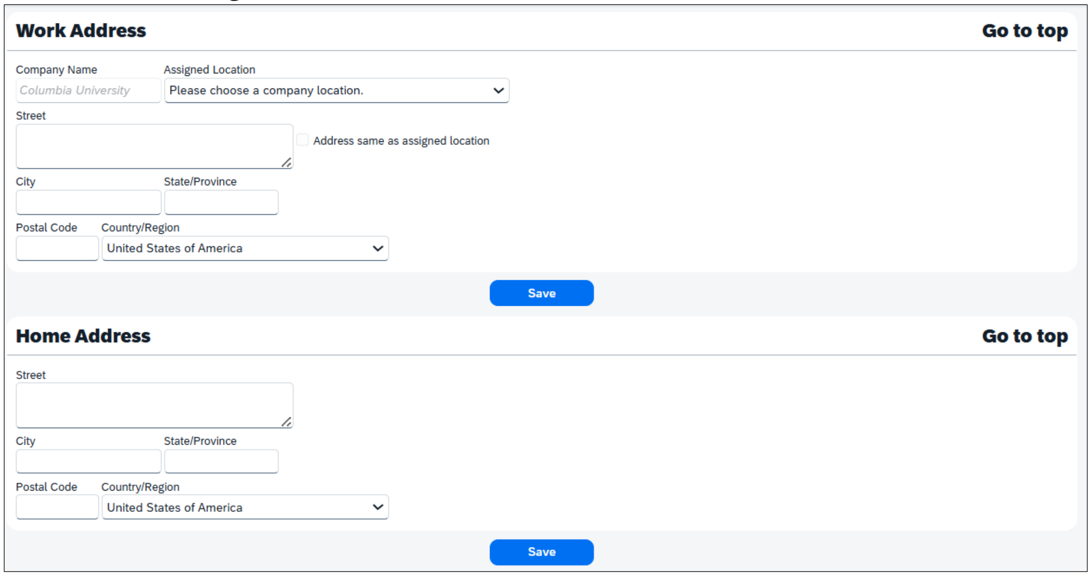
The name of your Supervisor will appear in the **Default approver** field if you have a Supervisor in PAC. If there is a discrepancy, speak with your Departmental HR representative. If you do not have a Supervisor, you will need to select an Initial Reviewer when submitting Requests or Expense Reports for approval.



Other Personal Information (Not Required)

Work Address and Home Address

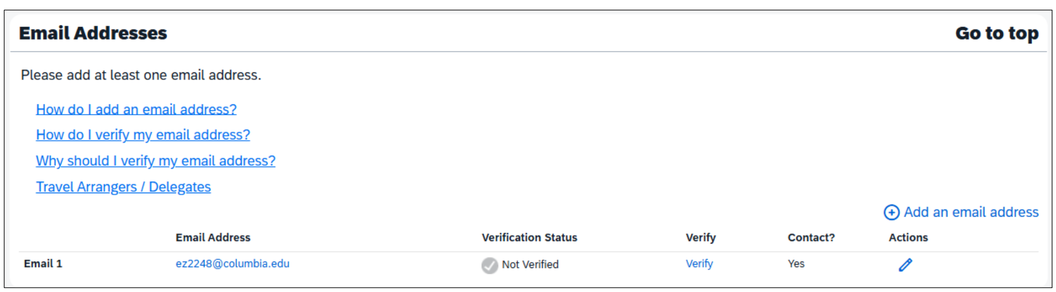
The **Work Address** and **Home Address** sections are optional but recommended to make updating other Profile Settings, such as Credit Cards, easier. In addition, it is also recommended if you anticipate needing to be reimbursed for Personal Car Mileage.



Email Addresses

You can email expense receipt attachments to receipts@concur.com, making them available to import into your Expense Reports. You must list any email address, including personal addresses, that you will use for this purpose into this section so that it is recognized by Concur. This would include the email of Expense Delegates who prepare Expense Reports on your behalf (see the section on Delegates). Refer to the FAQ in the section for more details.

If you have multiple Columbia email addresses, such as *firtname.lastname@columbia.edu*, *uni@adcu.columbia.edu*, *uni@cumc.columbia.edu*, etc., it is recommended that you add all variations.

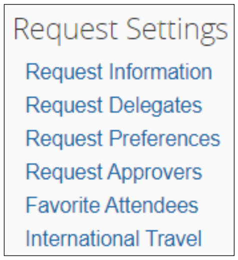


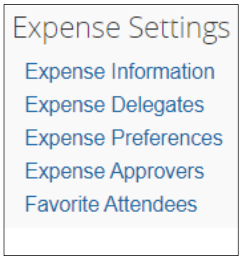
1. Click the **Add an email address** link.
2. Enter your **Email Address**.
3. Click **OK**.
4. Click **Verify**. A verification email with a Verification Code is sent to the address. If you do not see it in your inbox, check your Junk/Spam folder

5. Copy the Verification Code from the email and paste into the **Enter Code** field and click **OK**.

Request and Expense Settings

Request and **Expense Settings** allow you to setup preferences and defaults for when you prepare and submit Pre-Trip Requests, Cash Advance Requests or Expense Reports. Settings for Request/Expense Information, Request/Expense Delegates and Favorite Attendees are exactly the same and updating these settings can be accomplished in either place as the information is identical.

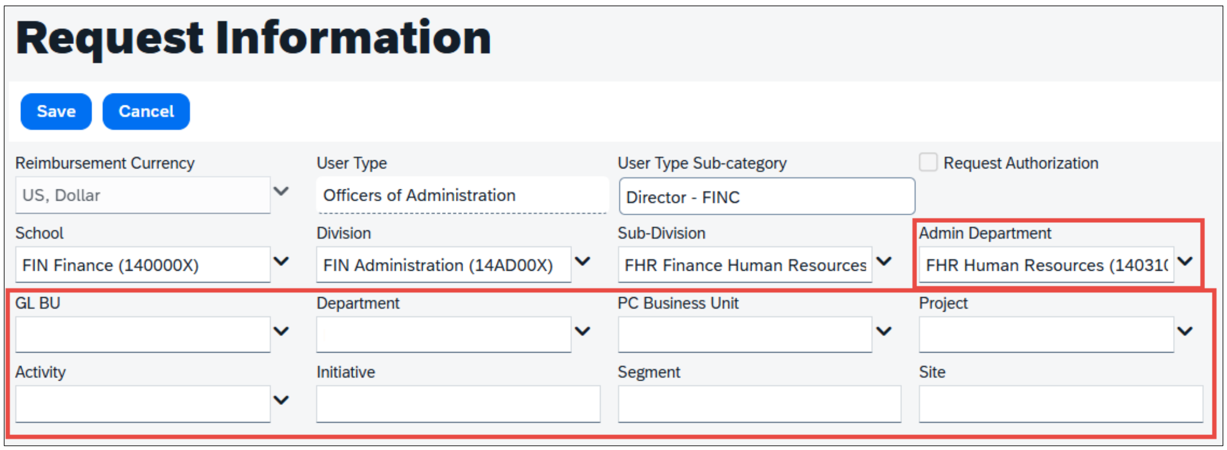




Rather than scrolling through a single page, each setting must be selected in order to view and edit.

Request/Expense Information

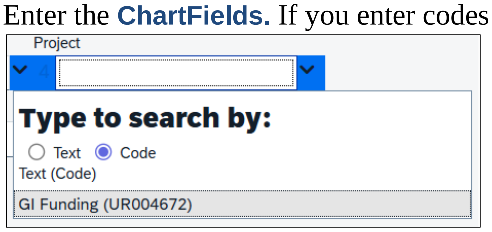
Click **Request Information** or the **Expense Information** link to display the form.



The Request / Expense Information is pre-populated from PAC with your School, Division, Sub-Division and Admin Department. These values will default to new Requests / Report and have an impact on workflow routing. The Division will drive workflow routing to Senior Business Officers when applicable.

The **Admin Department** will drive workflow routing to the Initial Reviewer when applicable. It is possible that your Level 8 Admin Department may not be populated or is incorrect. Ask your School or Department Senior Business Officer for guidance on how to update PAC.

Enter the **ChartFields.** If you enter codes in the ChartFields rather than text, click the field dropdown and select **Code**.

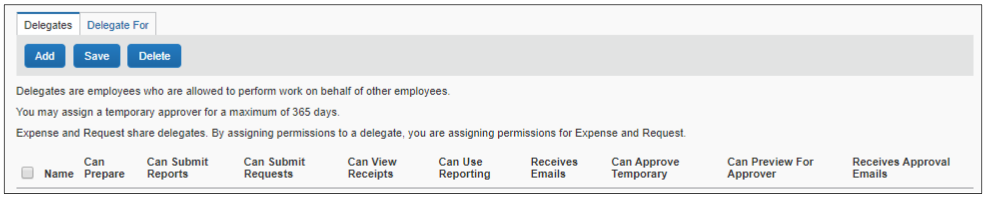


These will also populate as the default in new Requests / Reports. The **Department (2)** ChartField (and Dollar amount) will drive workflow routing to a Financial Approver. If you leave any ChartFields blank, you will need to complete those ChartFields on your Requests or Expense Reports.

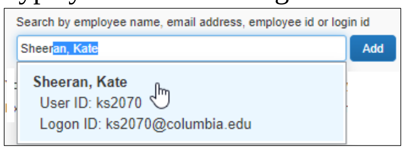
Delegates

You can name colleagues to act on your behalf to prepare Requests or Expense Reports. **Delegates** can create the reports and notify you when complete but they cannot submit expense reports on your behalf. You will receive notification when the report is ready to review and submit. If you are an Approver, you can name a colleague to approve Requests or Reports on your behalf. Your colleague must also be setup as an Approver in order for you to add them as an Approver Delegate. Please note that Delegates cannot use the Concur Mobile App when acting on your behalf and must use the Concur Desktop Application.

Click the **Request Delegates** or the **Expense Information** link to display the form.

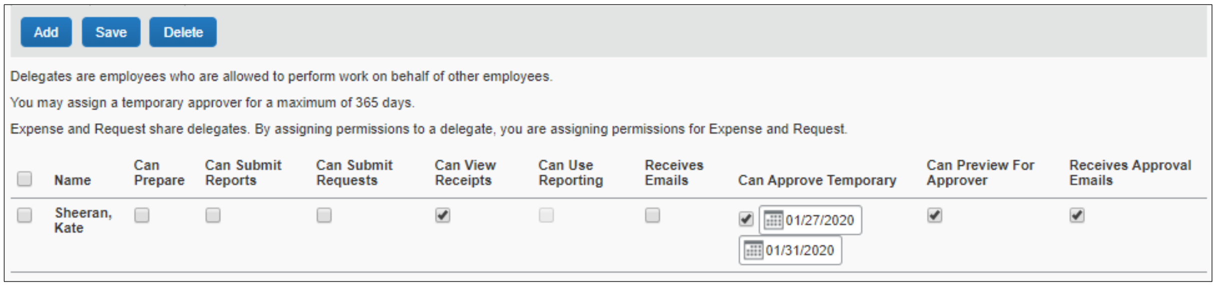


1. Click **Add**.
2. Type your **Search** using last name, UNI, email, etc. A list of matches appears.



3. Select the desired match or click the **Add** button next to the search field if your selection is not added.
4. Select the appropriate **checkboxes** to assign the permissions you wish to give the Delegate:
   - **Can Prepare** -The Delegate may prepare Expense Reports and Requests on your behalf. You will still be required to submit the Report for approval
   - **Can Submit Reports** – The Preparer Delegate is able to click Submit Report once they have finished preparing your Expense Report. However, a Preparer Delegate cannot submit the Expense Report into workflow for approval. Two things will happen: 1) your Delegate will see any audit alerts that may prompt them to check for accuracy and completeness; 2) you will receive an email notification that your Delegate has created an Expense Report which should be ready for review and submission. You will need to open the Report created on your behalf and click Submit Report to enter it into workflow for approval.
     If you do not authorize your Delegate to Submit Reports, they will not see the Submit Report button. Instead, the Delegate will see the Ready For Review button once they have finished preparing your Expense Report. When clicked, an email will be sent alerting you that your Expense Report is ready for review and the report status will change to Ready for Review. You must review the Report for accuracy and completeness prior to submitting it into workflow for approval.
   - **Can Submit Requests** – The Preparer Delegate is able to click Submit Request once they have finished preparing your Request. This works the same as Can Submit Reports. See details above.
   - **Can View Receipts** - Defaulted when selecting Can Prepare. This allows the Delegate to view your receipt store, receipts images, etc.
   - **Can Use Reporting** - If you have any reporting rights (typically restricted) you may assign that reporting license to a maximum of two individuals
   - **Receives Emails** – The Delegate receives all the same Concur emails as you
   - **Can Approve** - If you are an Approver, the Delegate may approve Reports and Requests on your behalf. The Delegate must also be setup in Concur as an Approver
   - **Can Approve Temporary** – Indicate the date range you are giving this Delegate to approve reports and requests on your behalf

- **Can Preview for Approver** – The Delegate will be able to review / validate all information that the approver sees, but cannot approve, when they are acting as that Approver
- **Receives Approval Emails** -This Delegate will be copied on all emails generated by Concur notifying you of requests and reports pending your approval



6. Click **Save**.

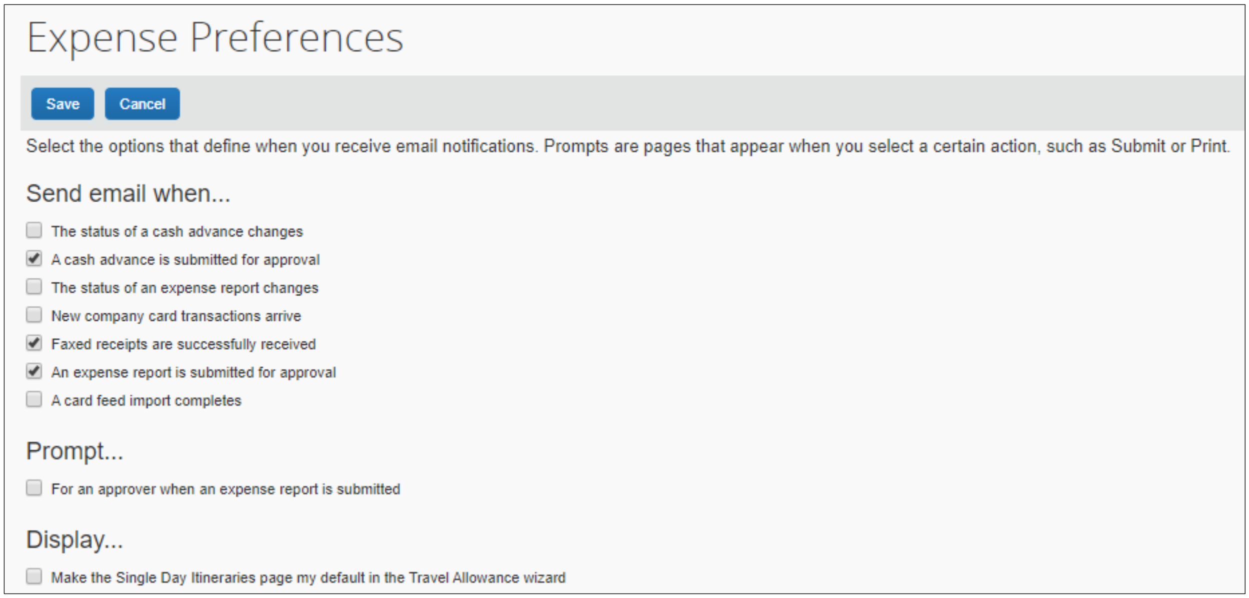
Request Preferences

Click the **Request Preference** link to display the settings.

You can turn on or off email alerts and prompts associated with Requests. Select the desired options and click **Save**.

Expense Preferences

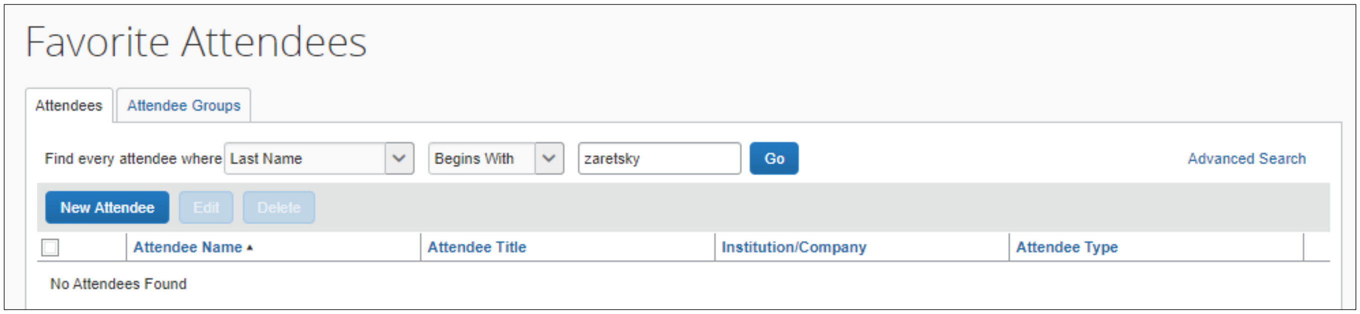
Click the **Expense Preference** link to display the settings.



You can turn on or off email alerts and prompts associated with Requests and Expense Reports. Select the desired options and click **Save**.

Favorite Attendees

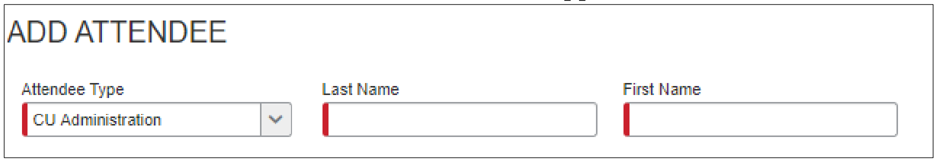
Click the **Favorite Attendees** link to add or edit Attendees.



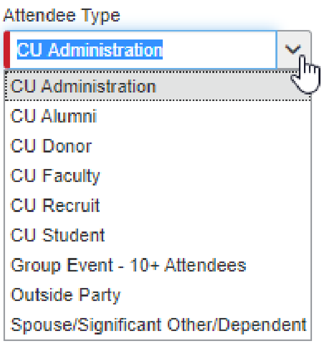
When preparing an Expense Report, the names and details of attendees are required for several Expense Types, such as Business Meals and Entertainment. You can save Favorite Attendees and Attendee Groups if you anticipate creating multiple Reports with the same attendees (i.e., recurring team meetings or events.)

Adding a Favorite Attendee

1. Click **New Attendee**. The Add Attendee form appears.



2. Select the **Attendee Type** from the dropdown menu.

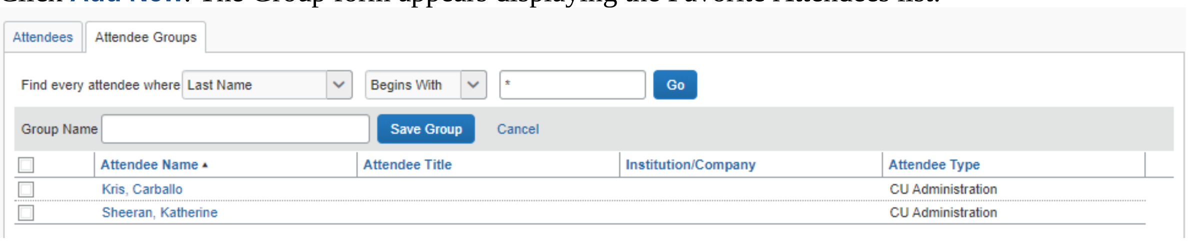


3. Enter the **Last Name** and **First Name**.
4. Click **Save**.

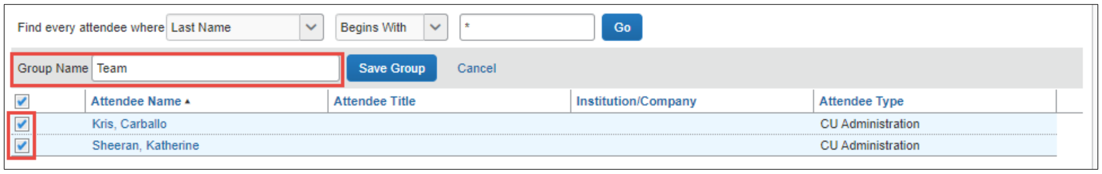
Adding an Attendee Group

1. Click the **Attendee Groups** tab.

2. Click **Add New**. The Group form appears displaying the Favorite Attendees list.



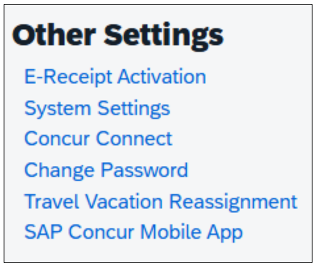
2. Type the **Group Name** and select the desired **Attendee Names** to be in the group.



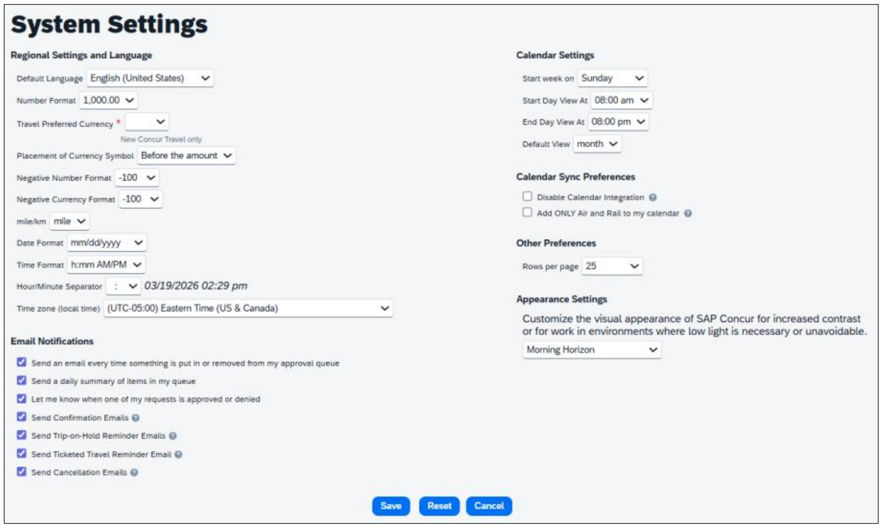
4. Click **Save Group**.

Other Settings

Other Settings include preferences for language, calendar and number format, Apps from various vendors that you can connect to Concur, and Mobile PIN resets.



System Settings



1. Select the desired **Regional Setting and Language**, **Calendar Settings** or **Other Preferences** settings.
2. Click **Save**.

Concur Connect

Concur Connect displays the apps that are currently linked to Concur account.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com