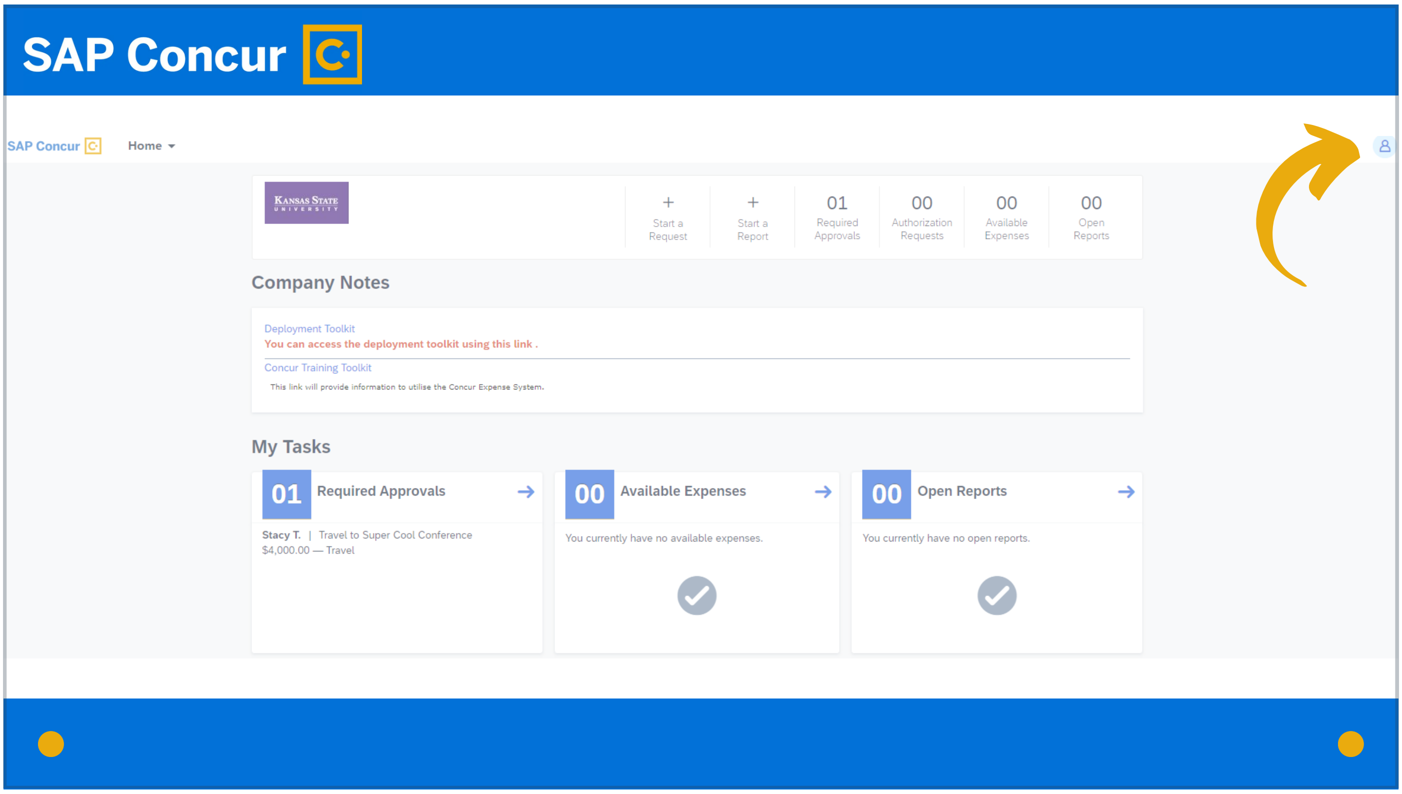
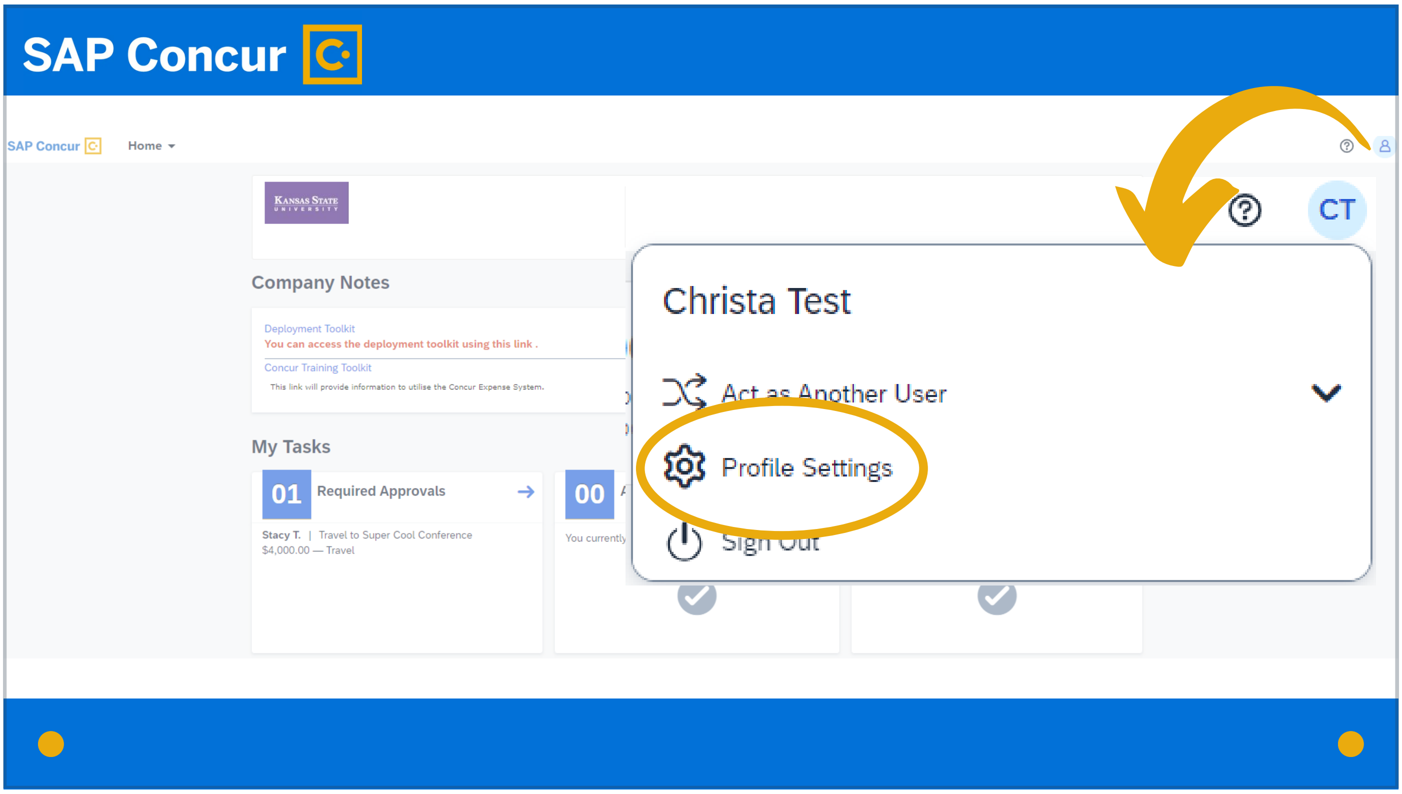
SAP Concur

Concur Expense Management:
Profile Settings

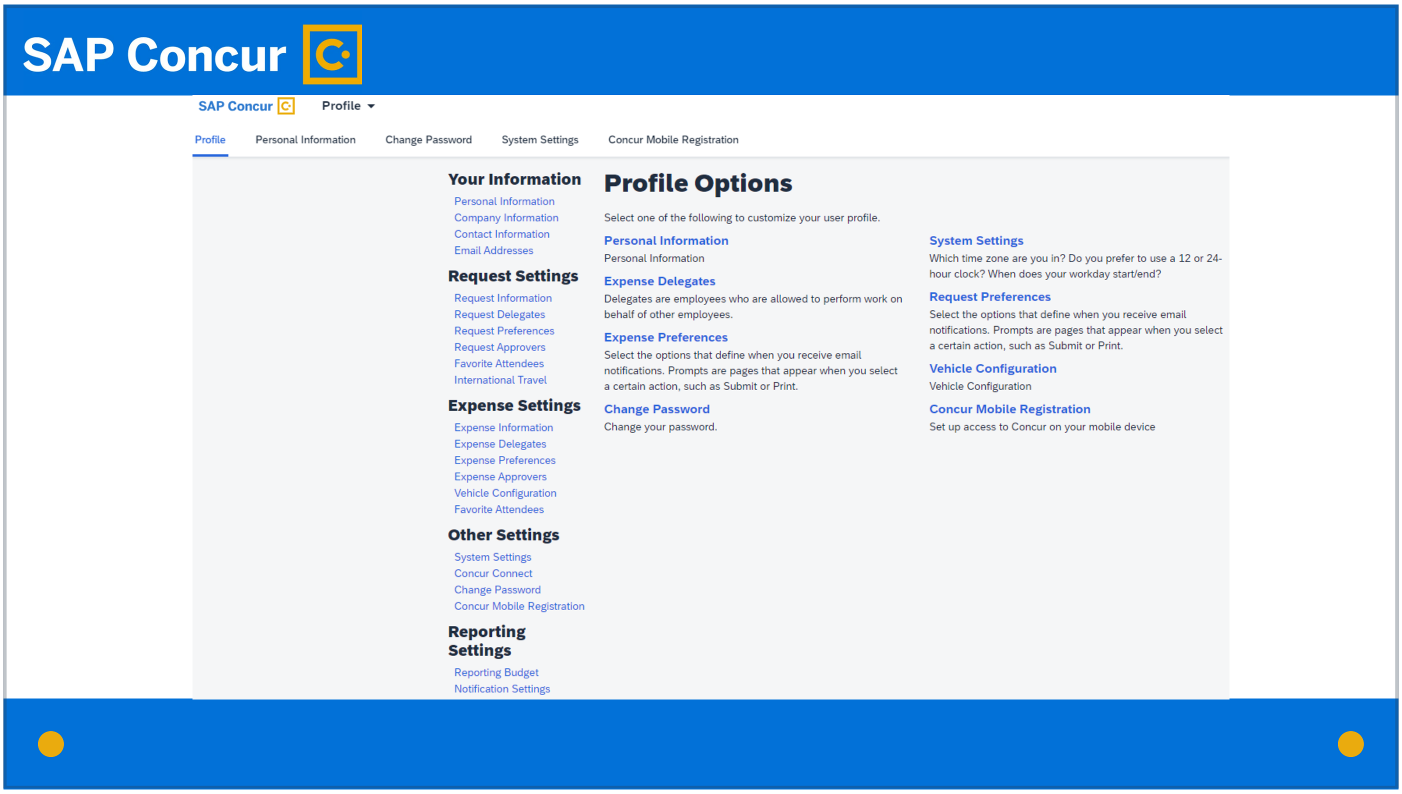
Welcome to today's training on Concur profile settings.



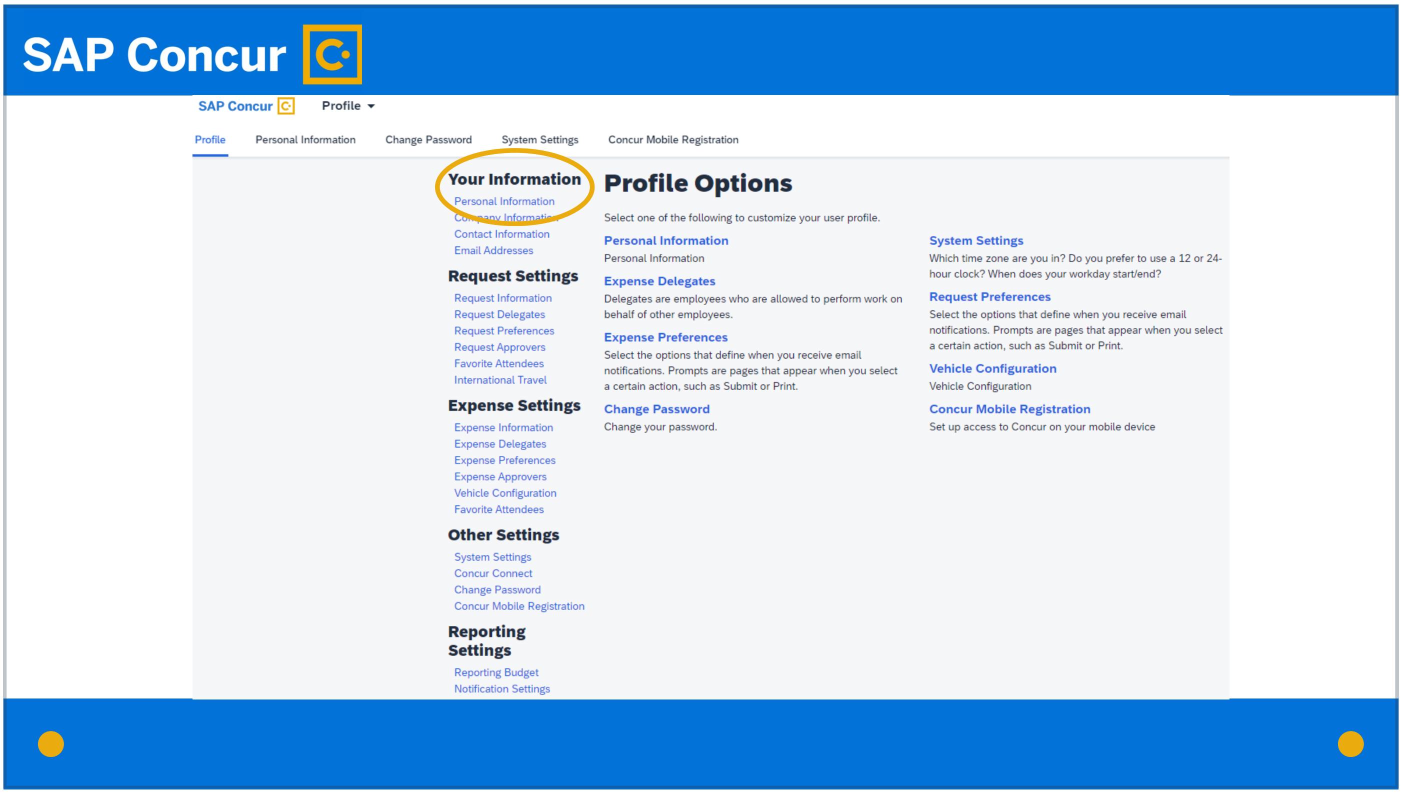
To access Profile Settings, click on the profile icon at the top right of the Concur website screen.



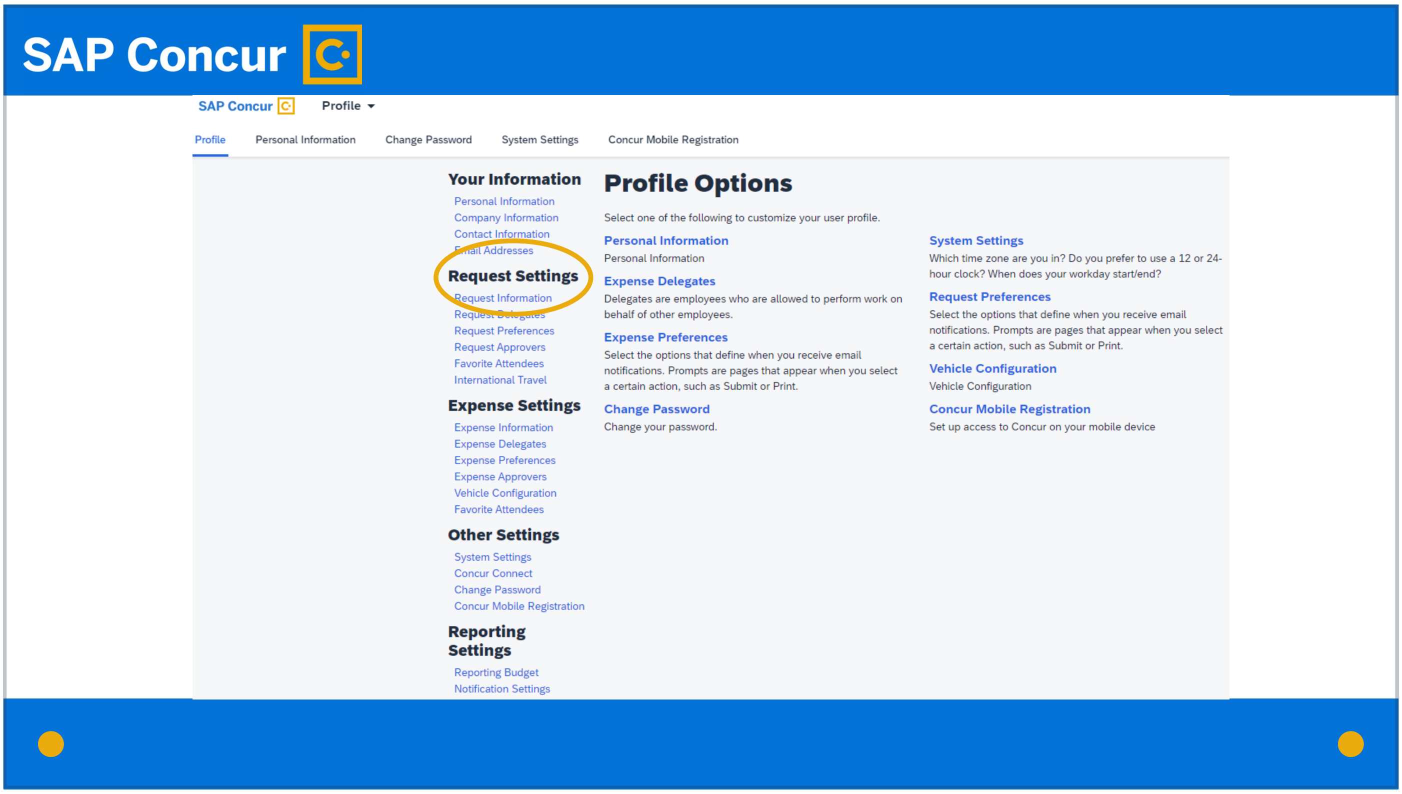
Then select Profile Settings.



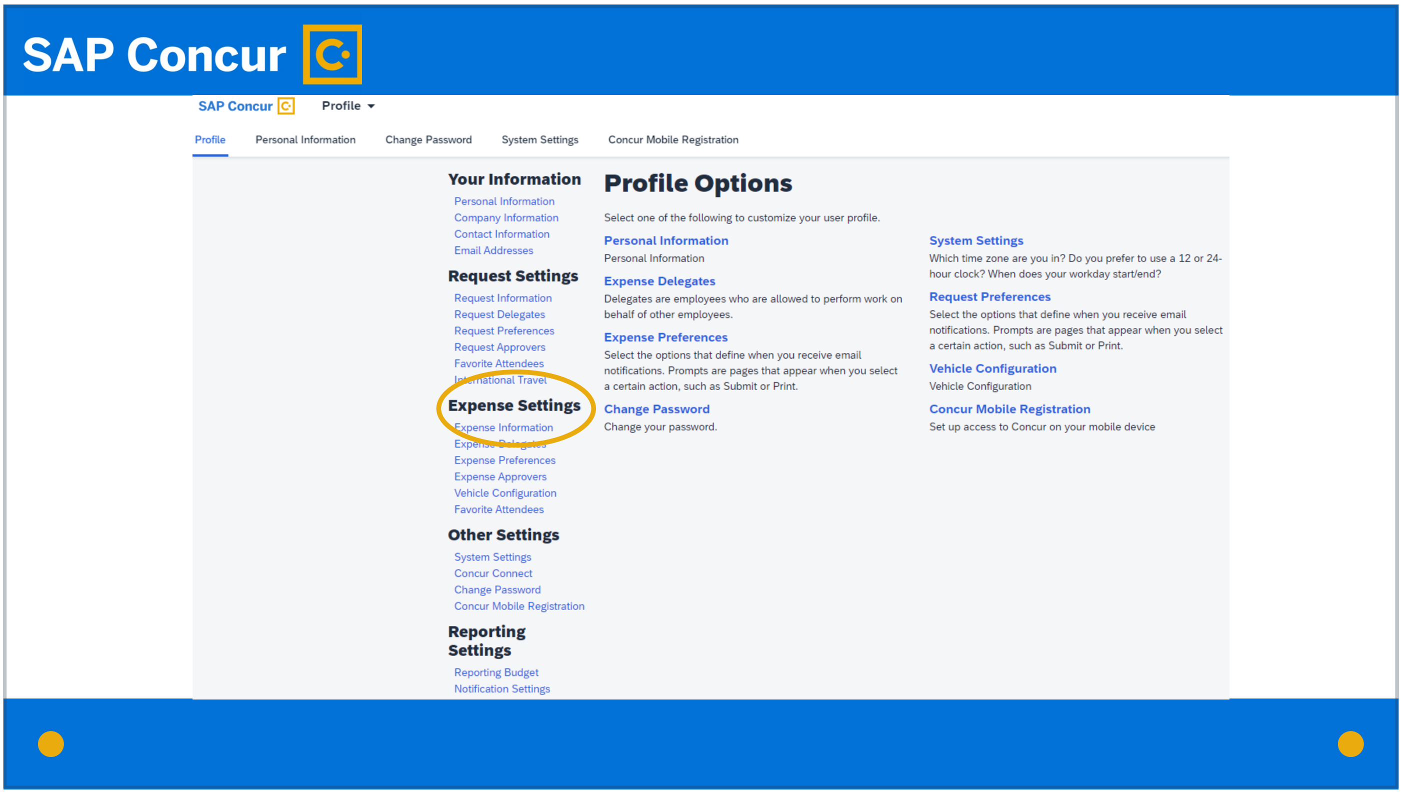
This will open the main Profile Options page.



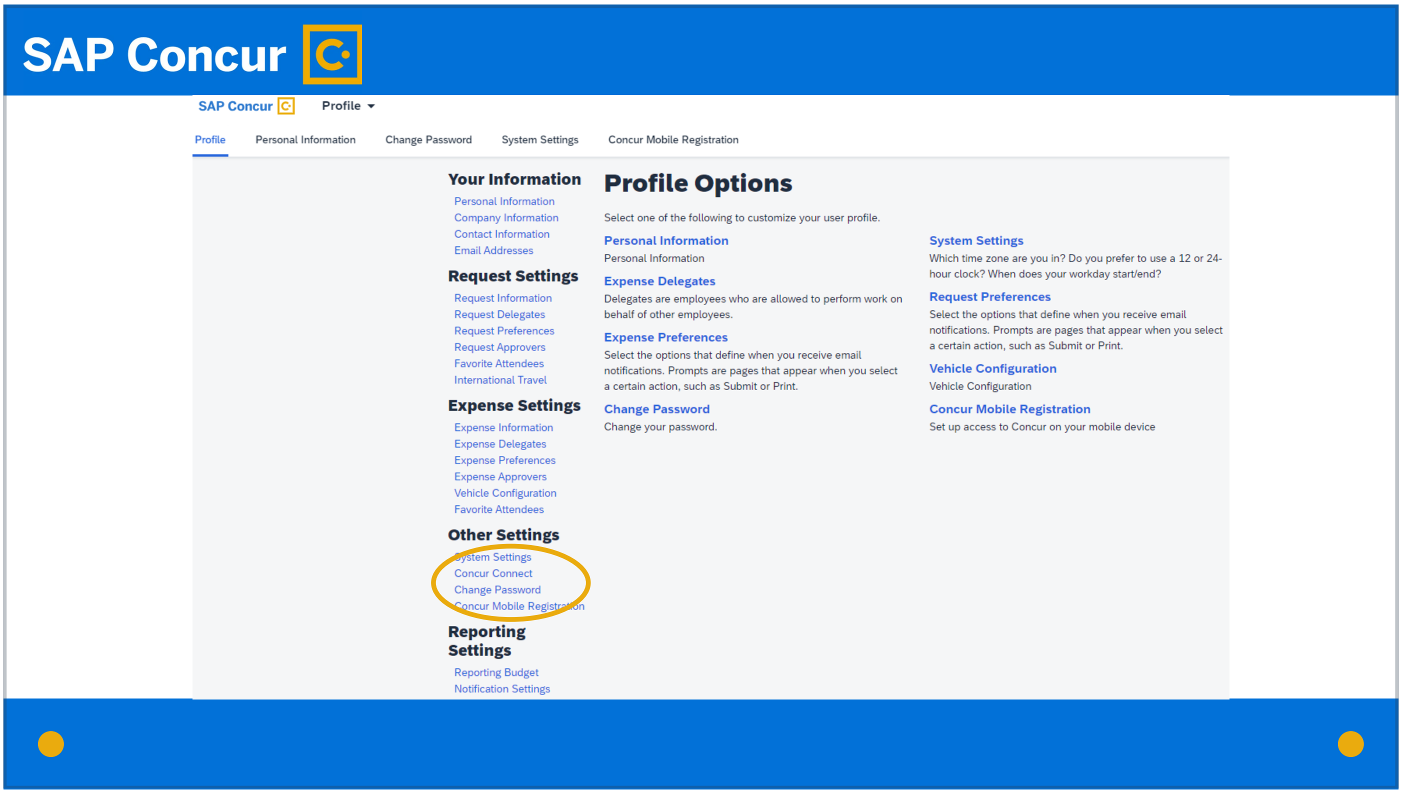
Here, you will find settings for personal information,



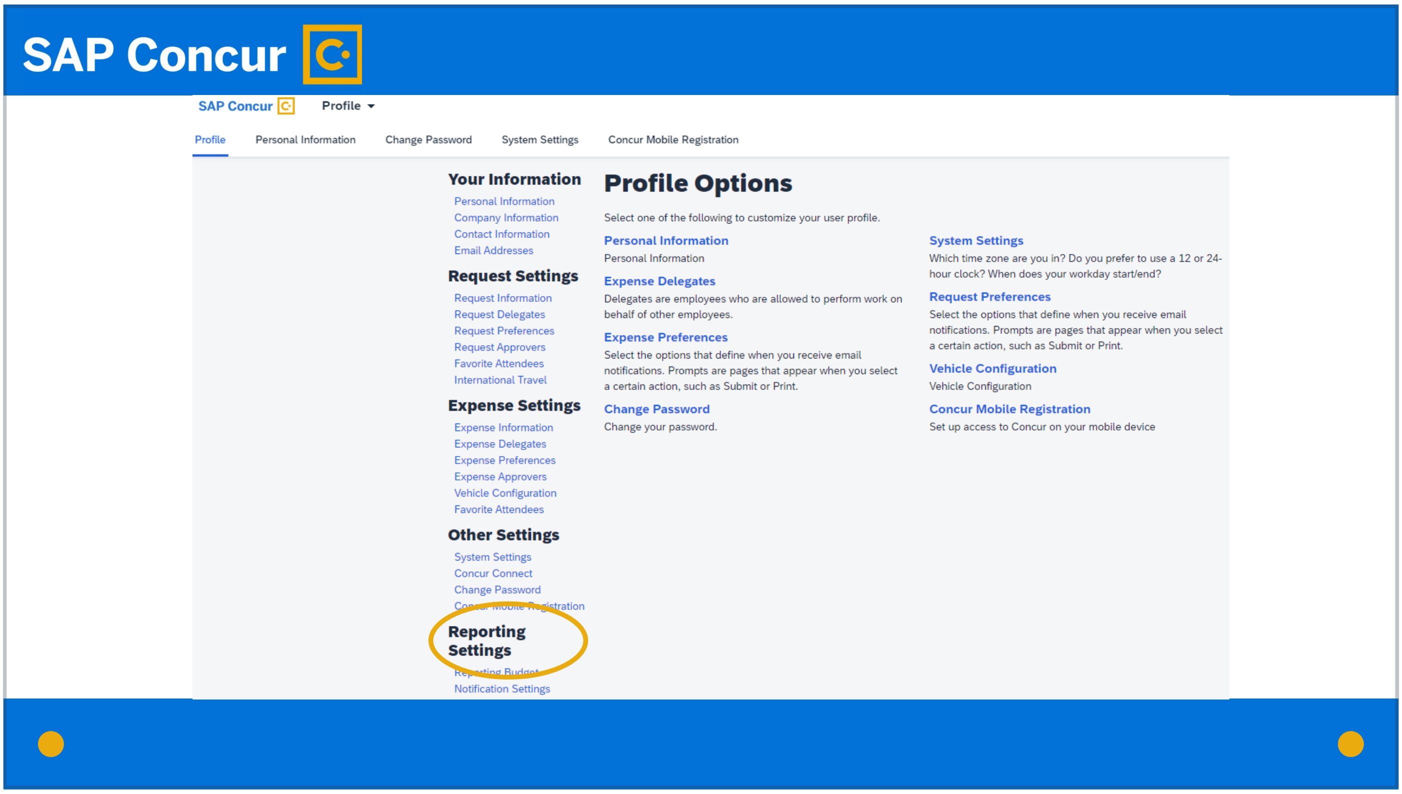
travel or card requests,



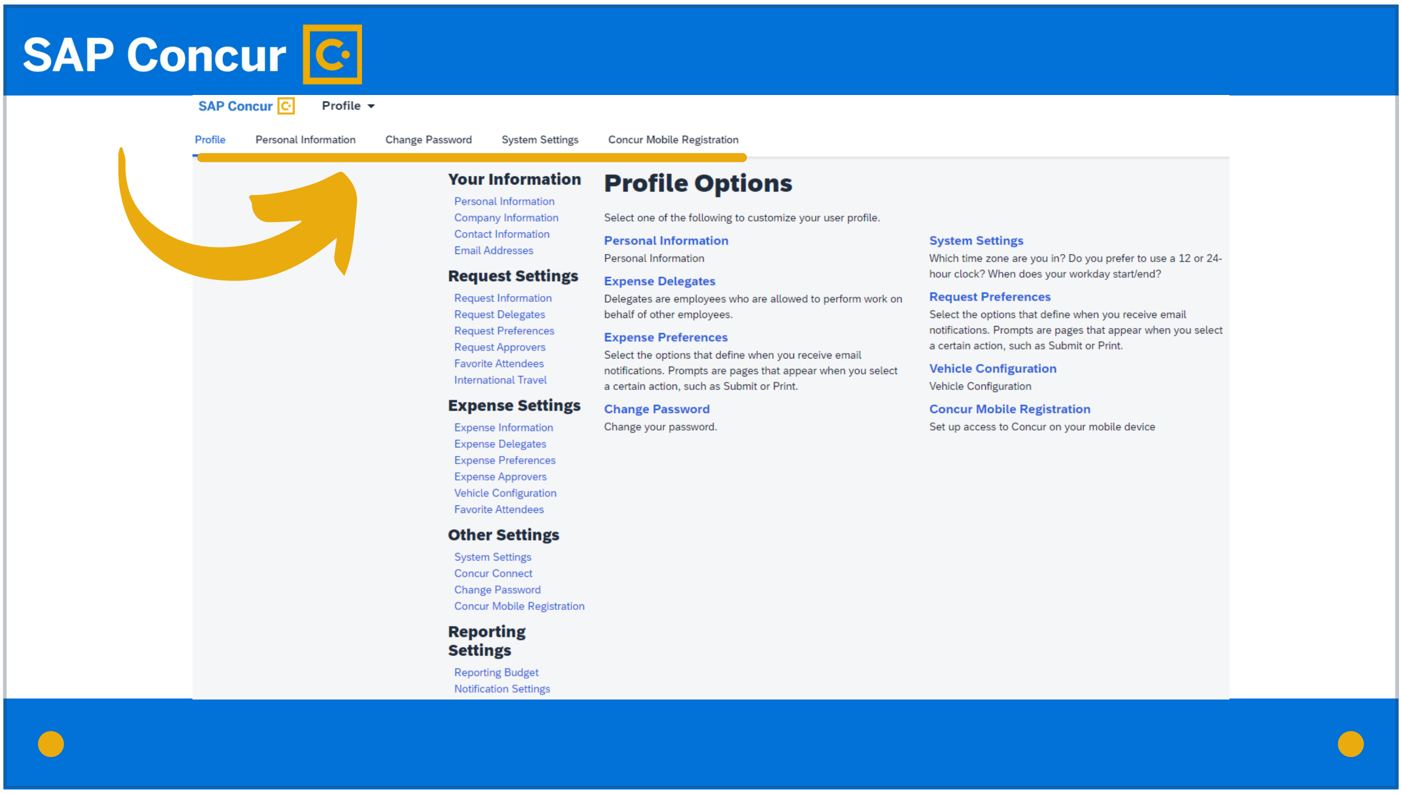
expense reports,



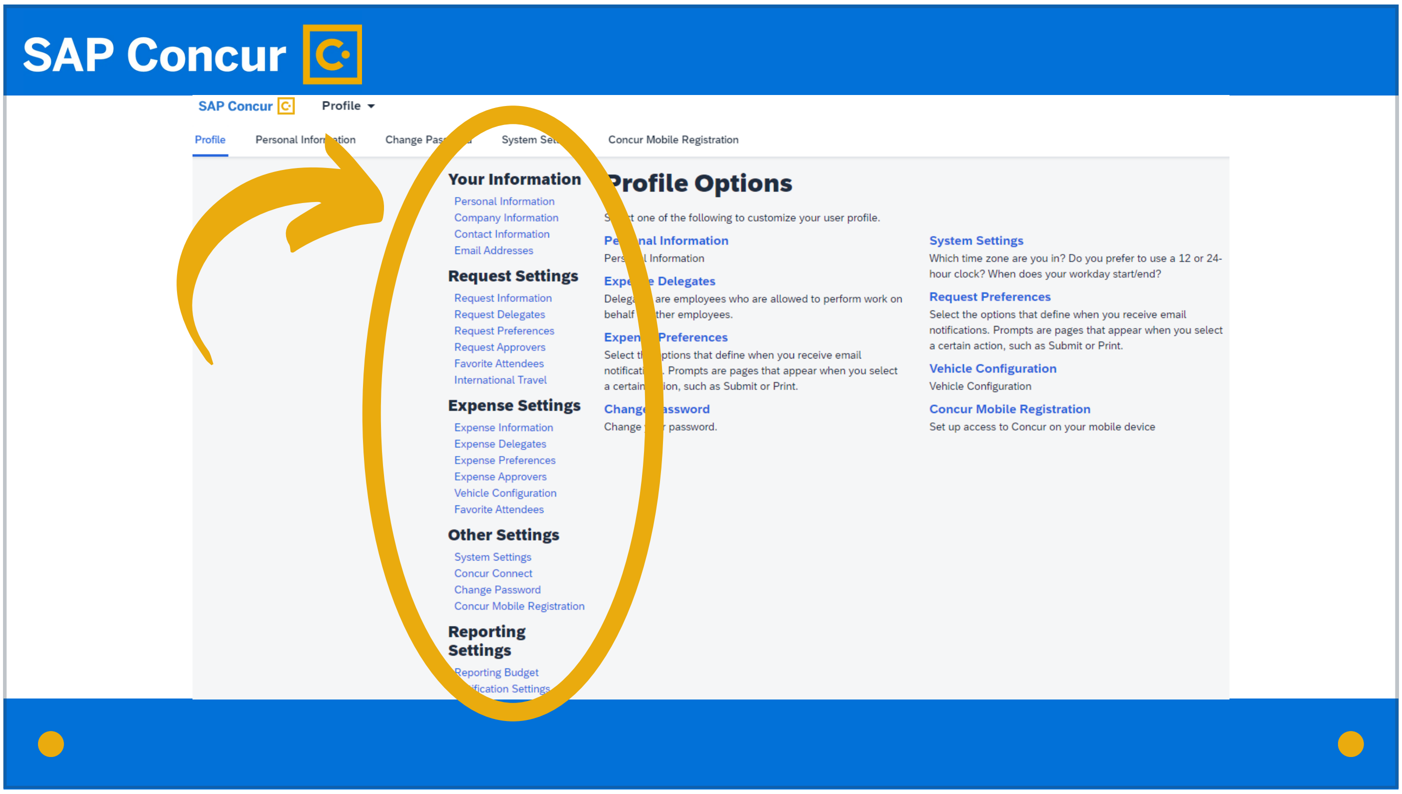
Concur systems,



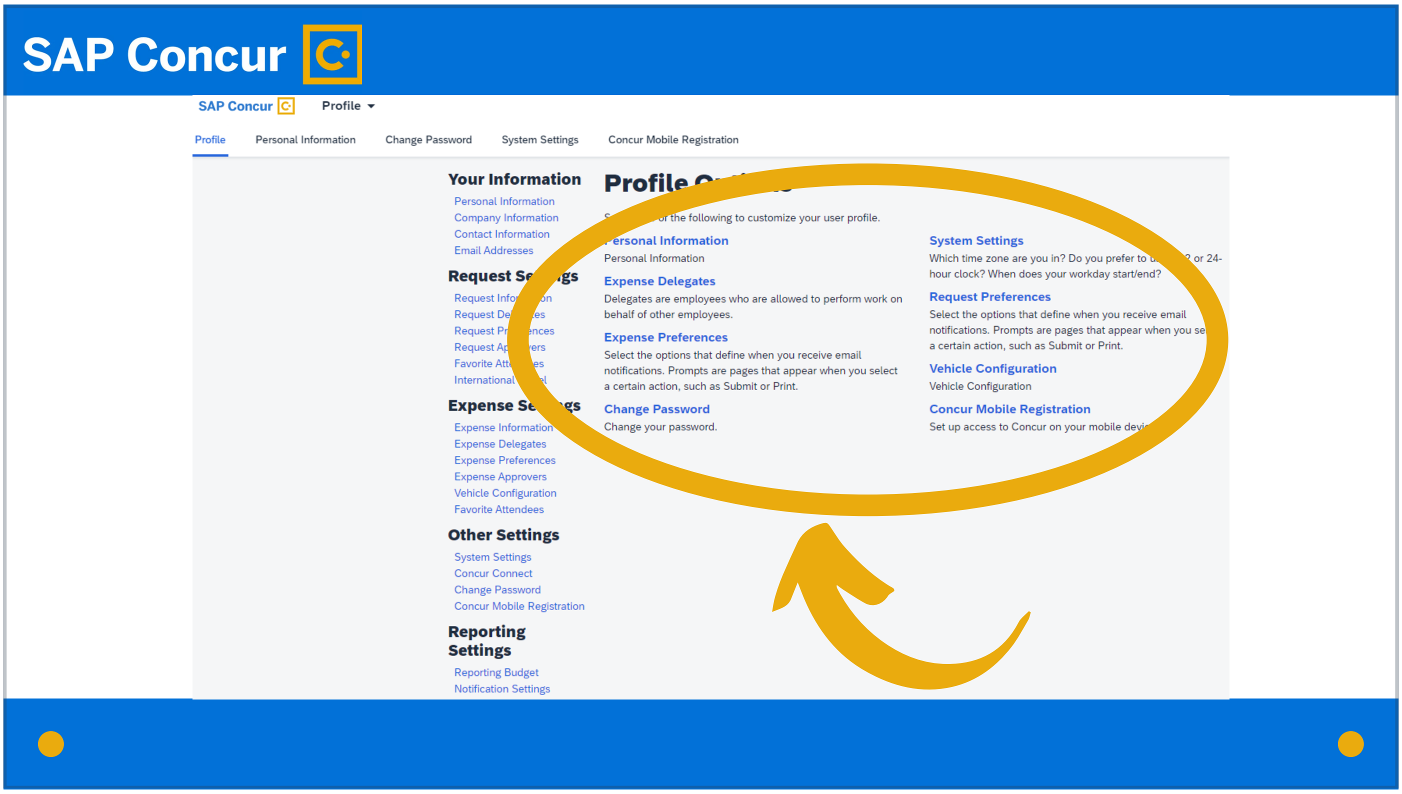
and reporting.



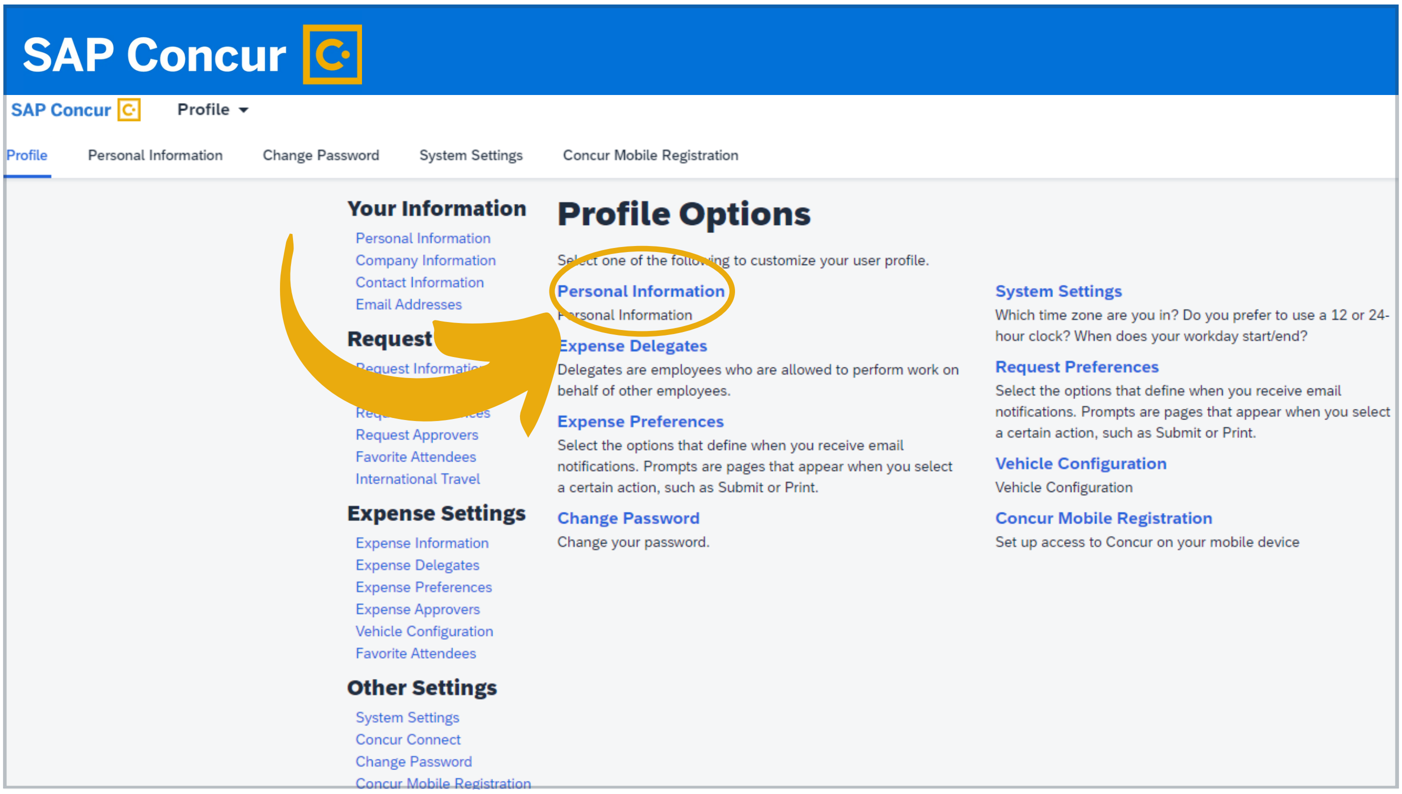
There are quick links at the top of the page to access some of the most commonly-used settings,



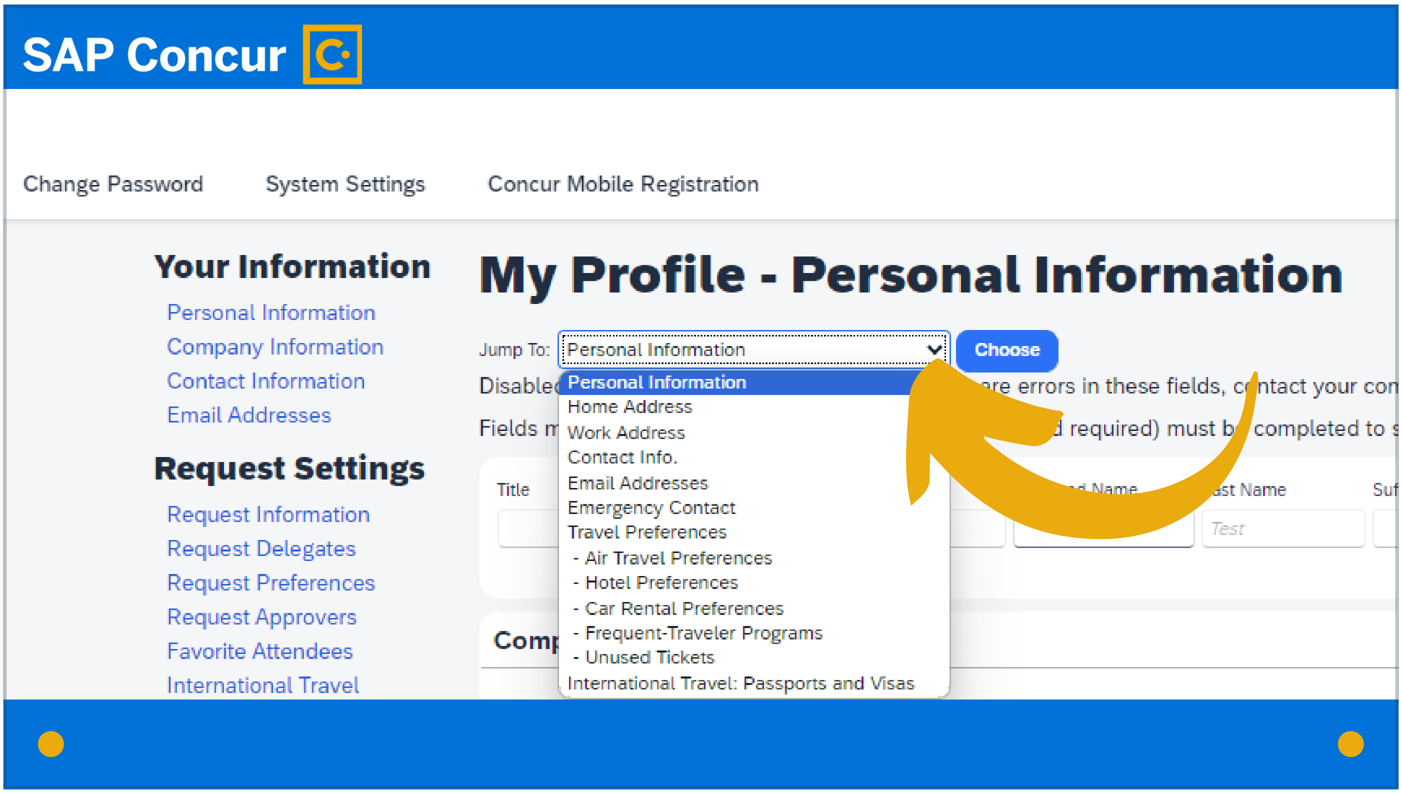
or you can access any of the settings from the left sidebar



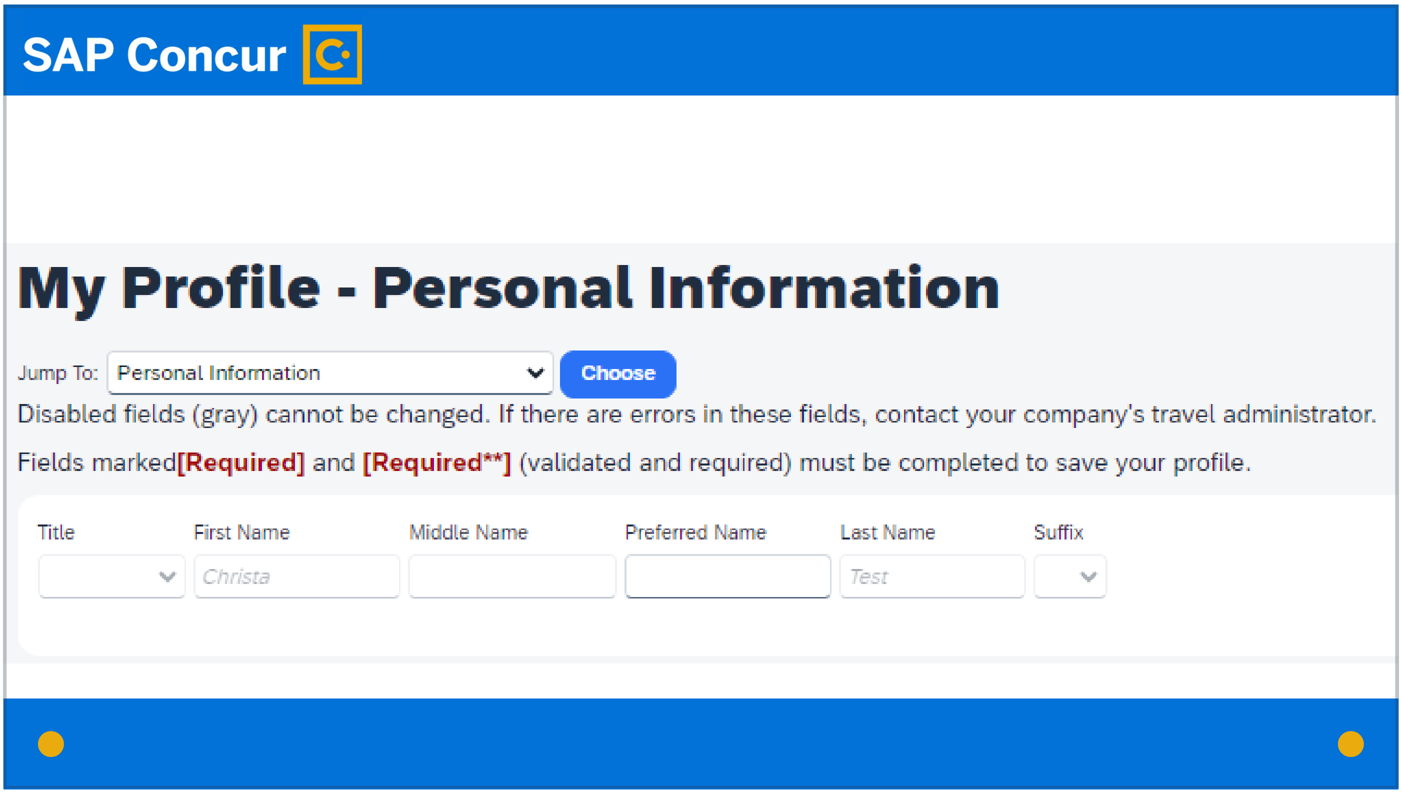
or the main content of the page.



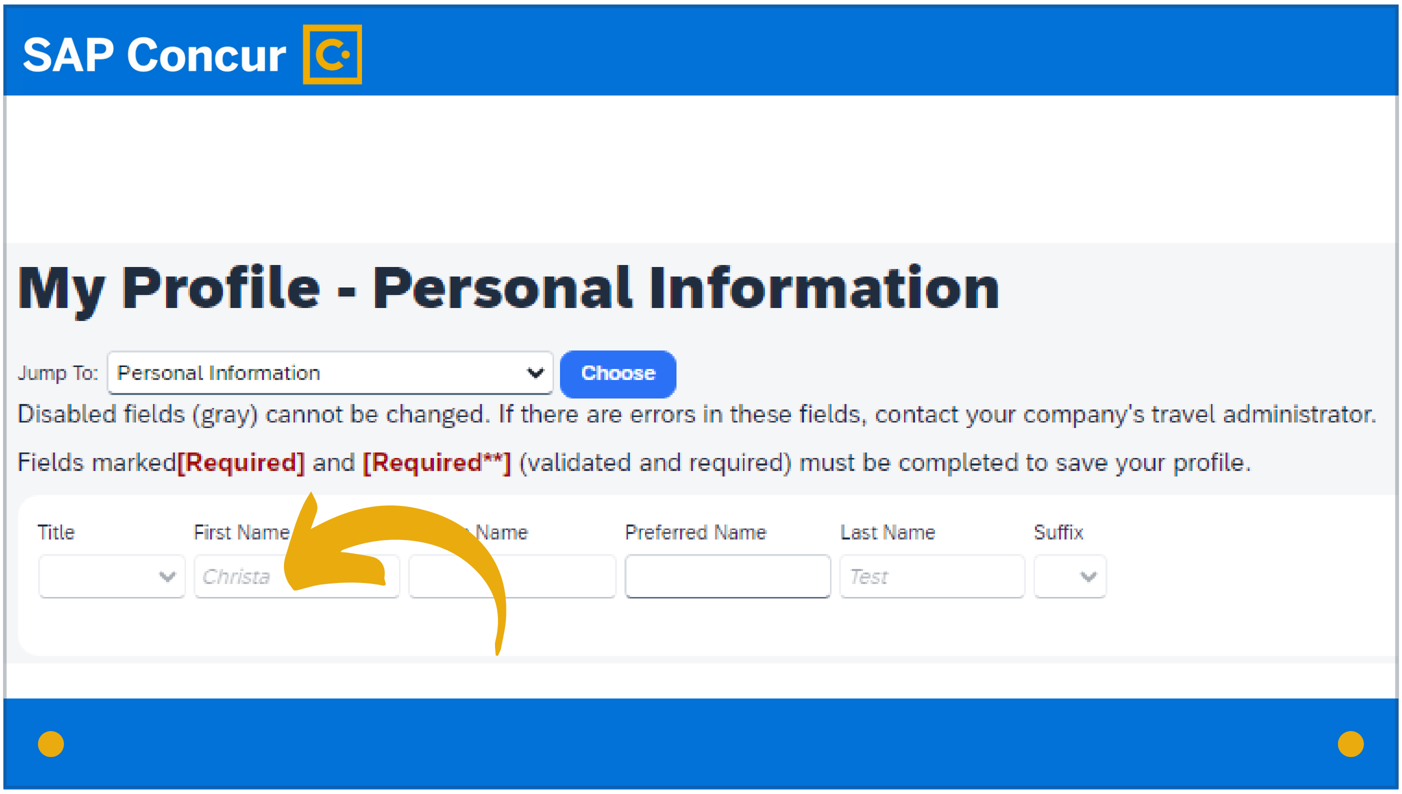
One of the primary settings is Personal Information.



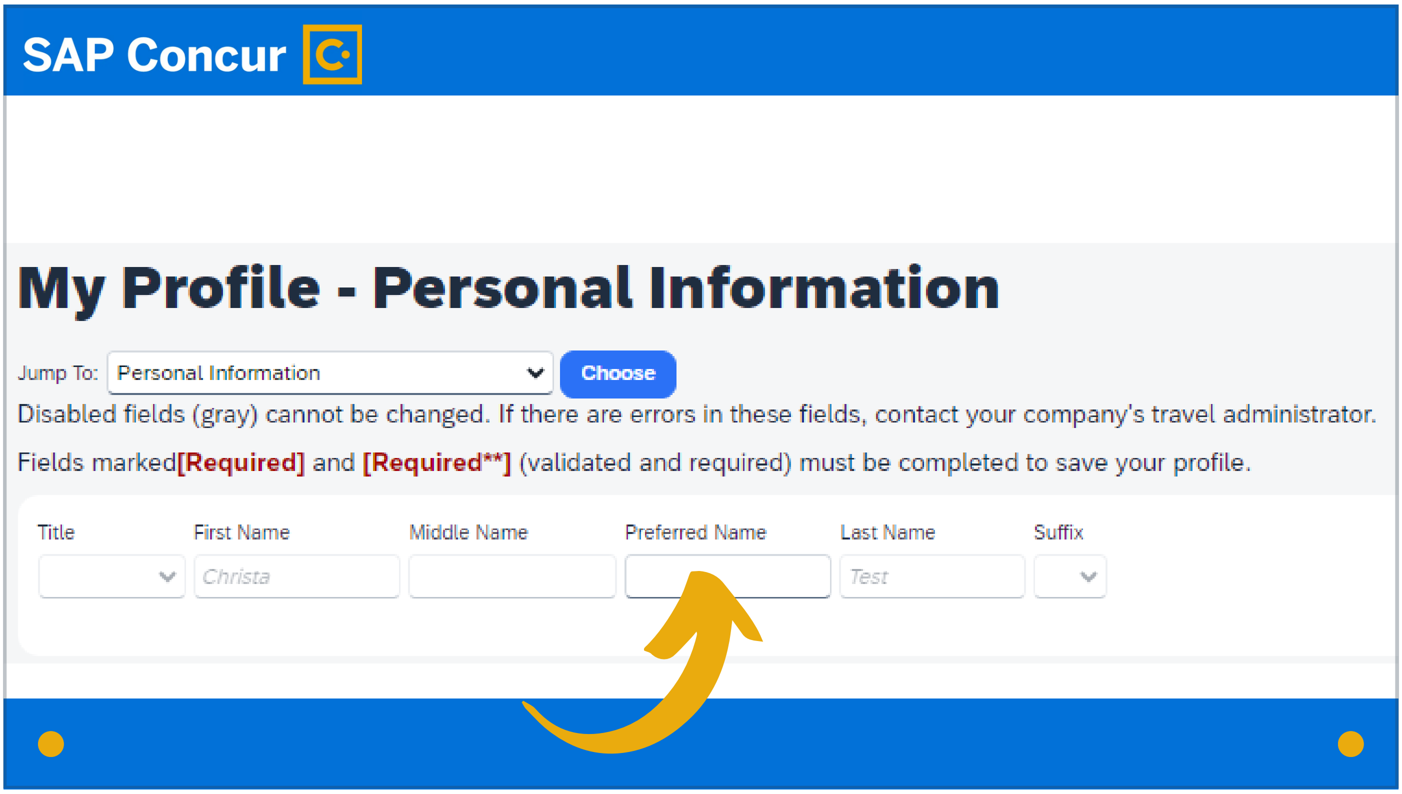
Under Personal Information, the dropdown menu at the top of the page allows you to jump to any of the Personal Information sections to quickly access the information you need to update—or you can scroll down the page.



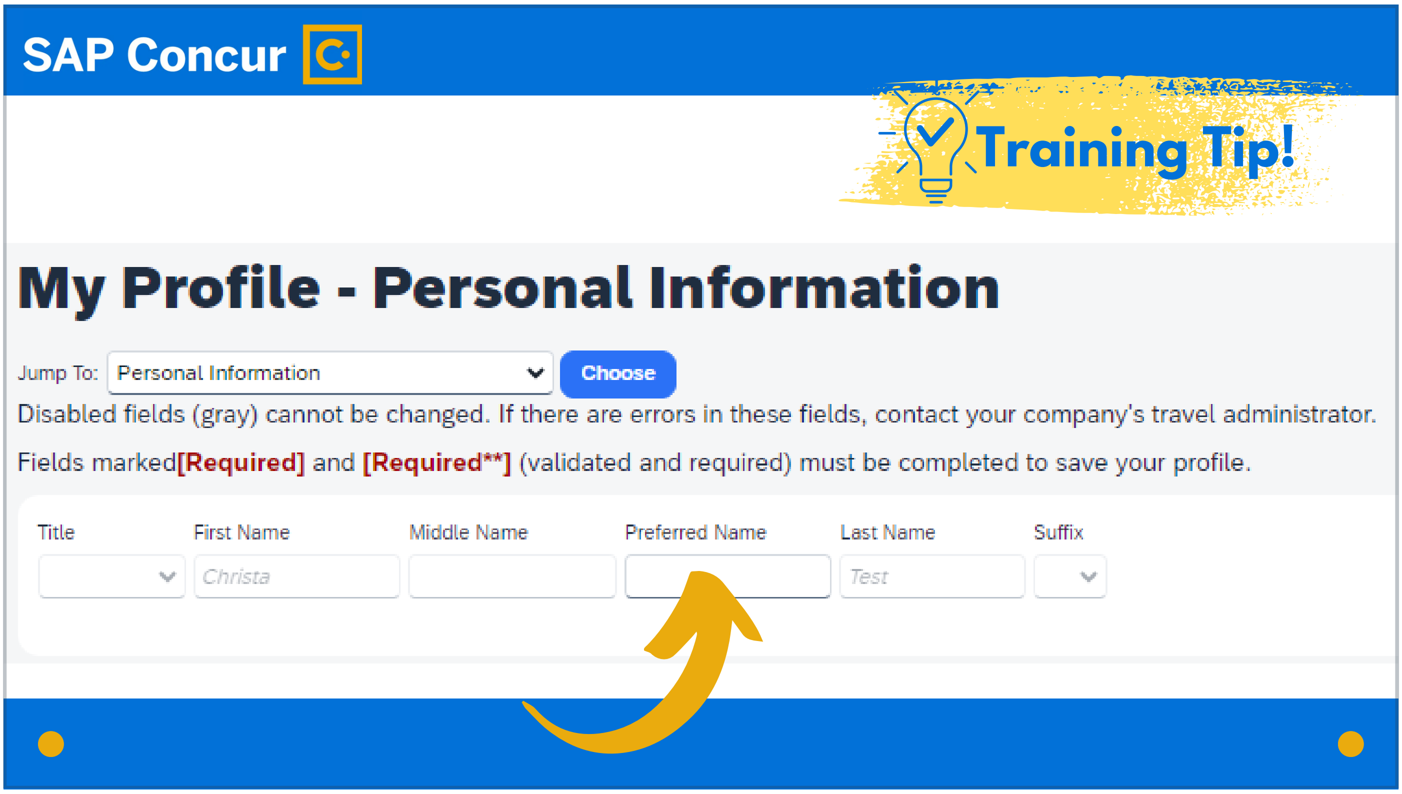
Under the first section of the Personal Information page are your name details.



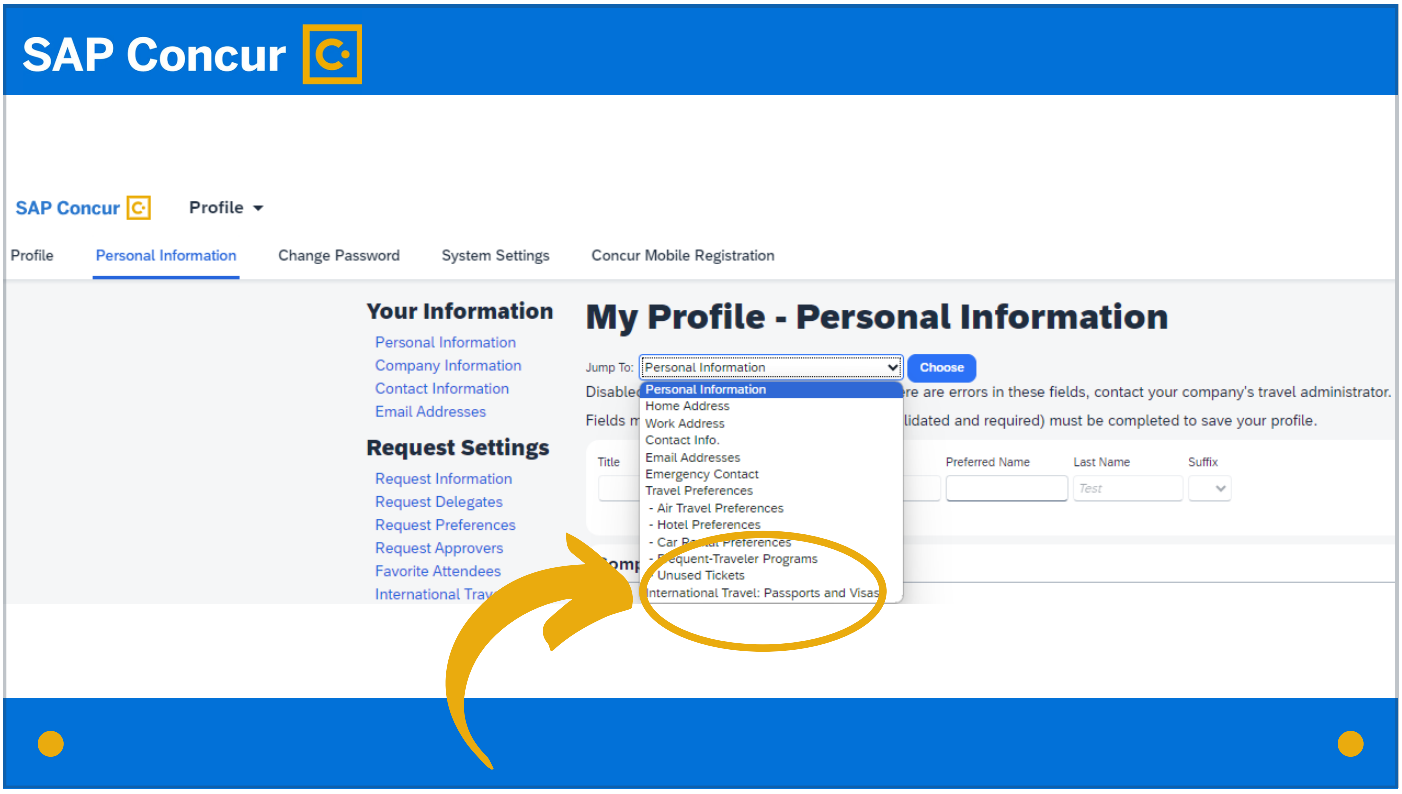
The first and last name fields are entered automatically and cannot be changed,



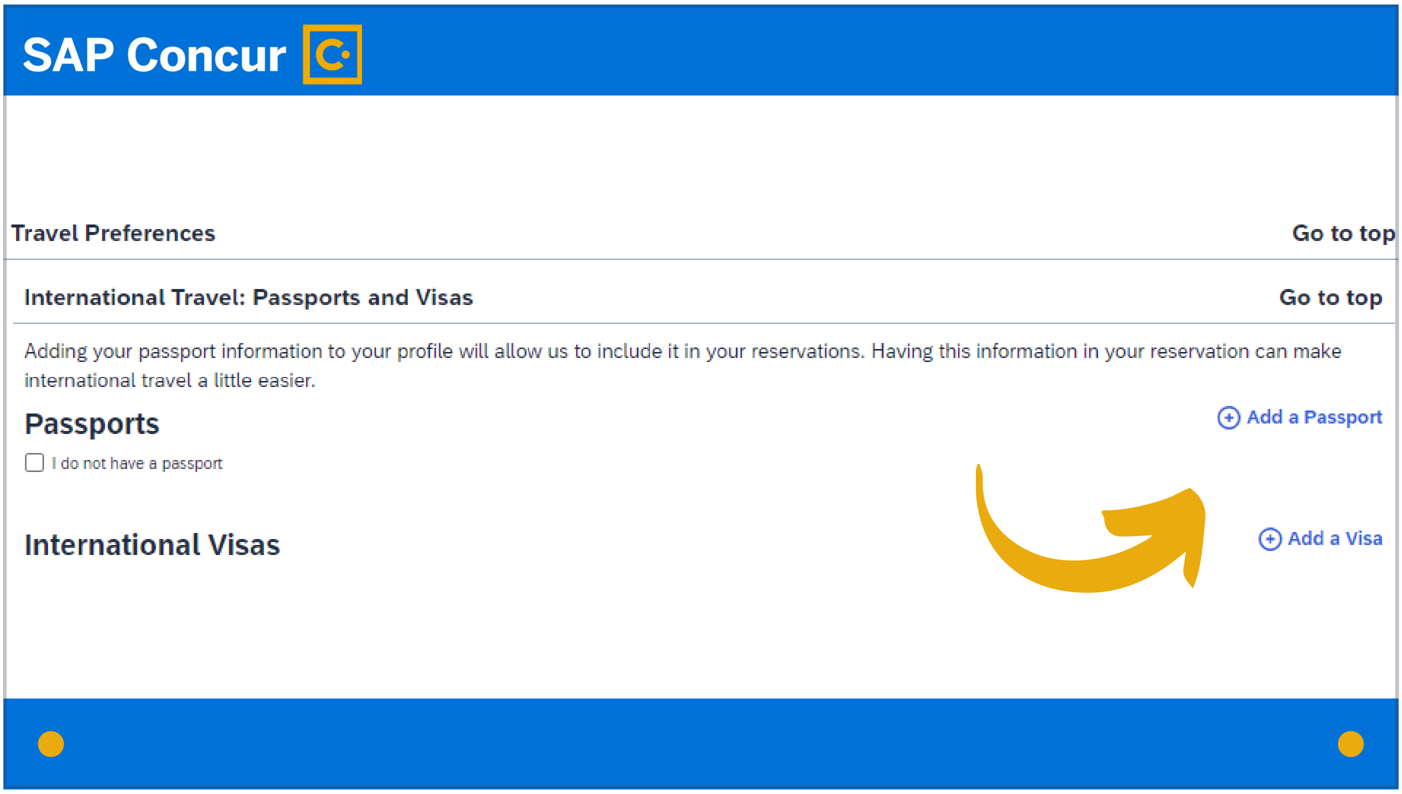
but the preferred name field is fillable.



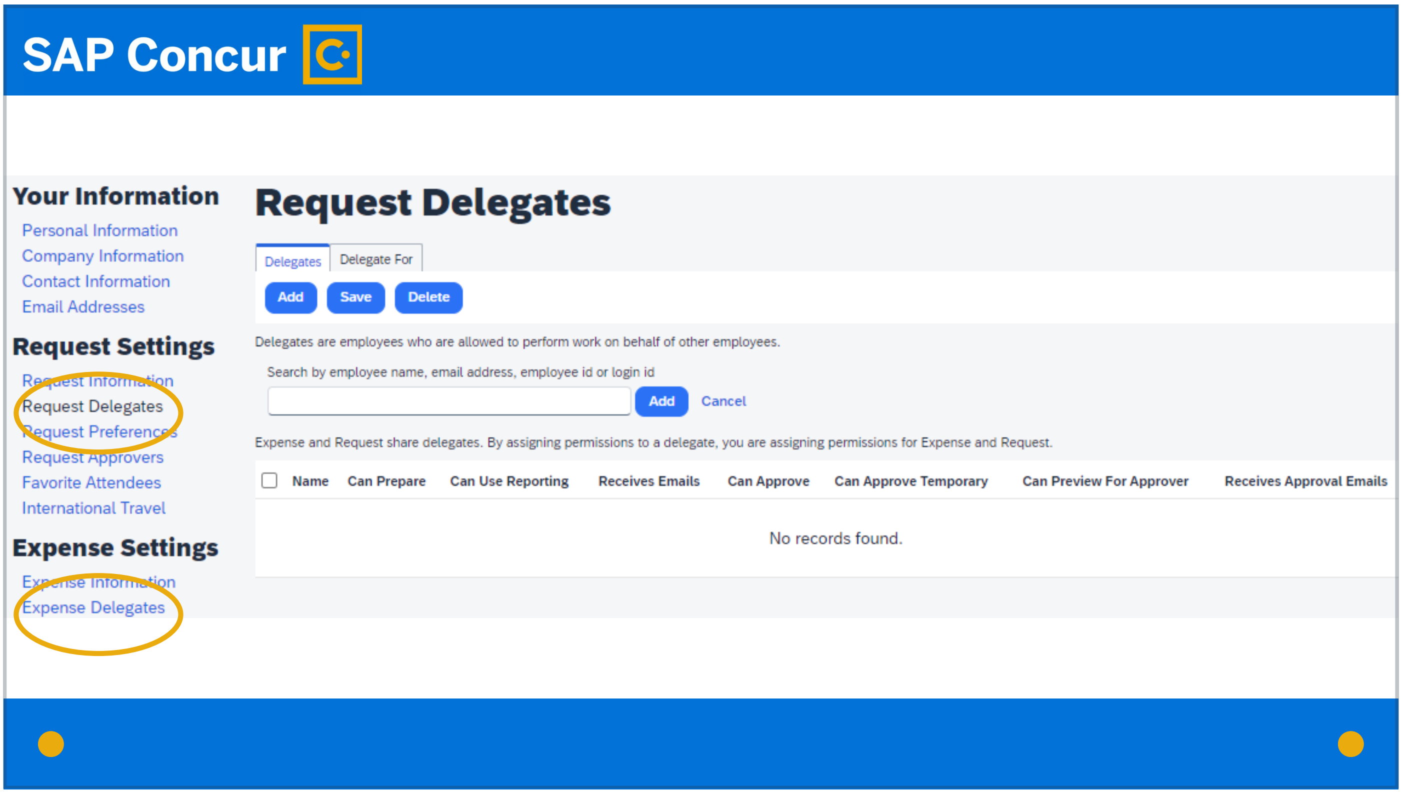
Training Tip! For traveling purposes, make sure this preferred name is the legal name used on your travel documents to ensure that all travel registration corresponds with the IDs used for boarding.



International travelers have the option on the Profile Settings Personal Information page to enter passport and visa info to include in reservations.

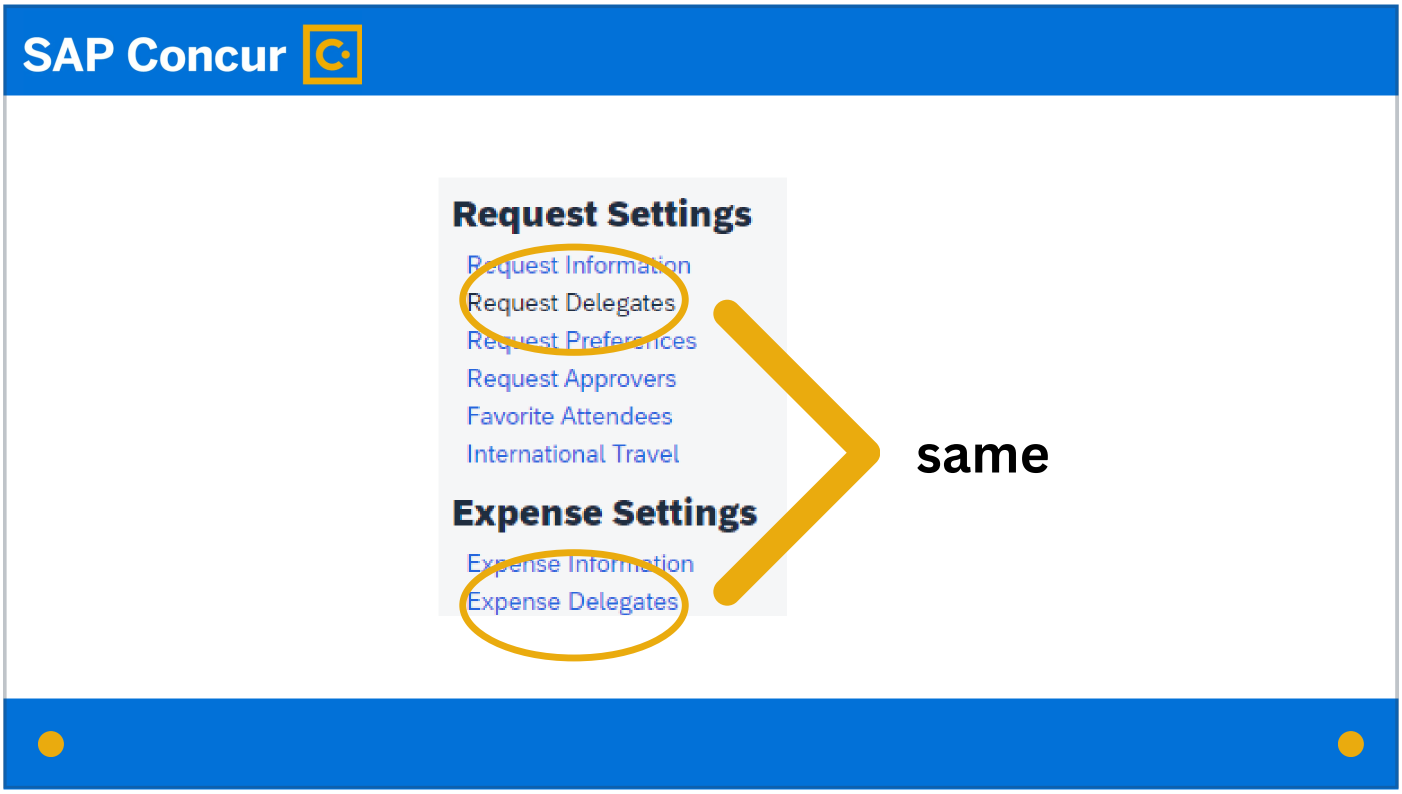


Just click on the Add a Passport or Add a Visa option.

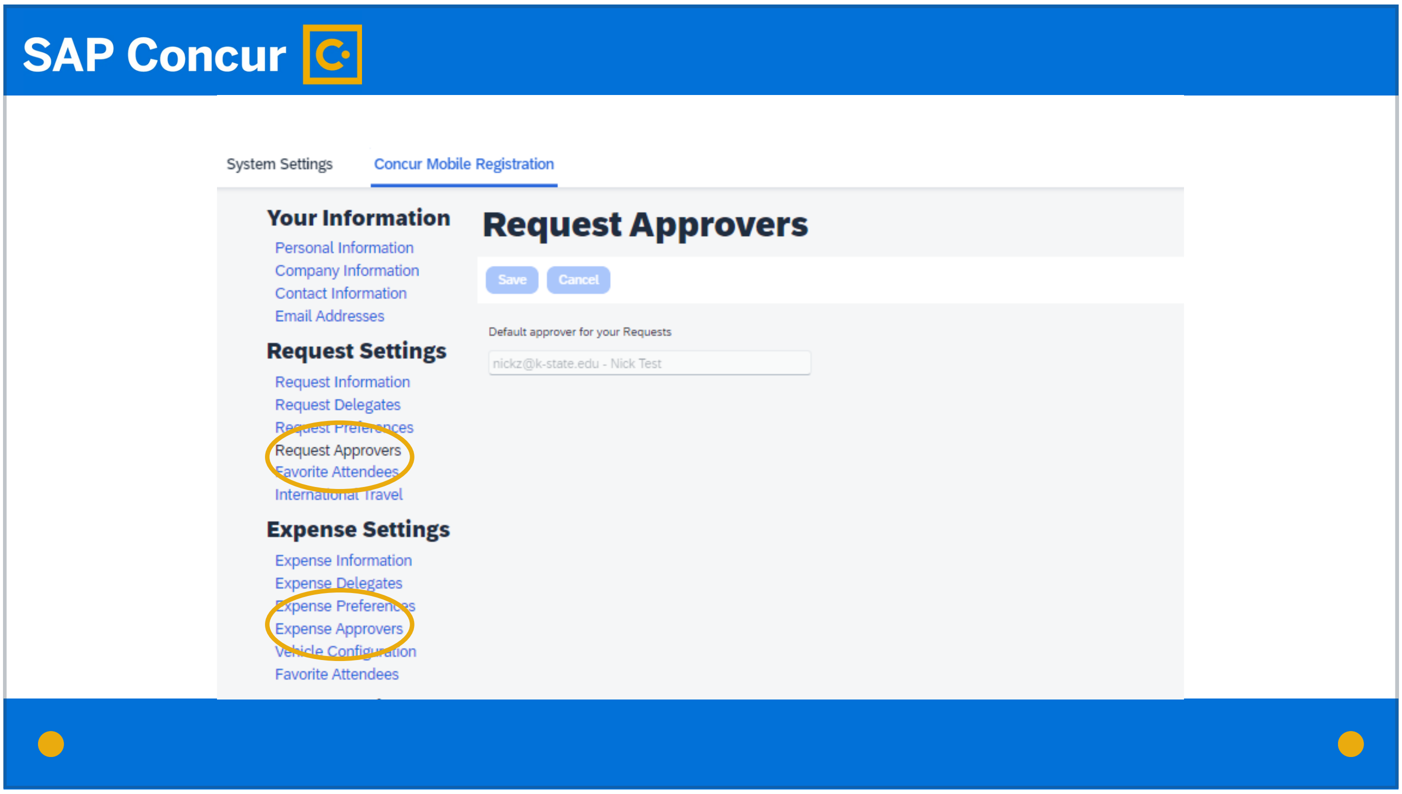


Either the Request Settings or Expense Settings section under the Profile Options page allows you to set up delegates.

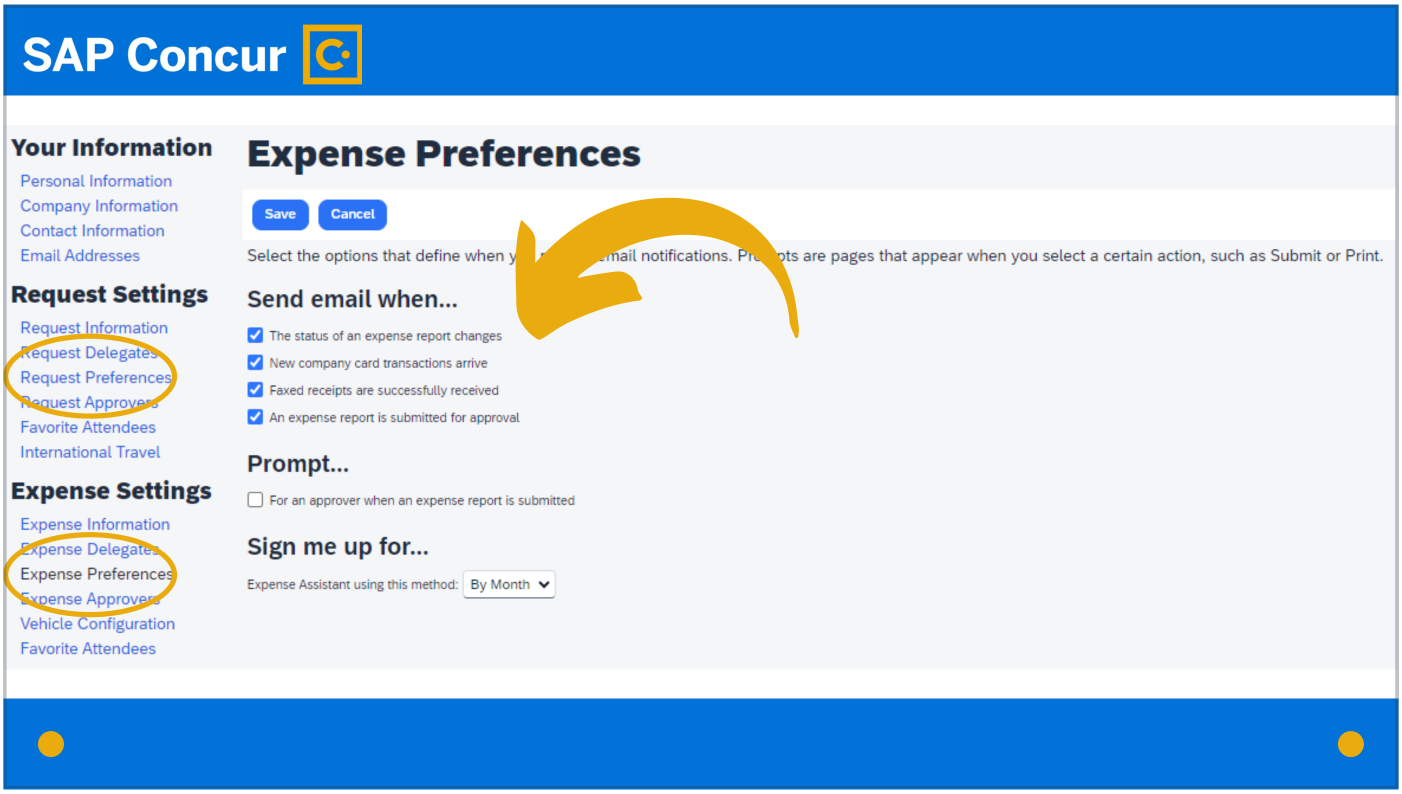
Delegates are individuals who have your permission to create requests or expense reports on your behalf or, if you are an approver in your department, individuals who may approve requests or reports on your behalf. More details on delegates are available in our delegate training.



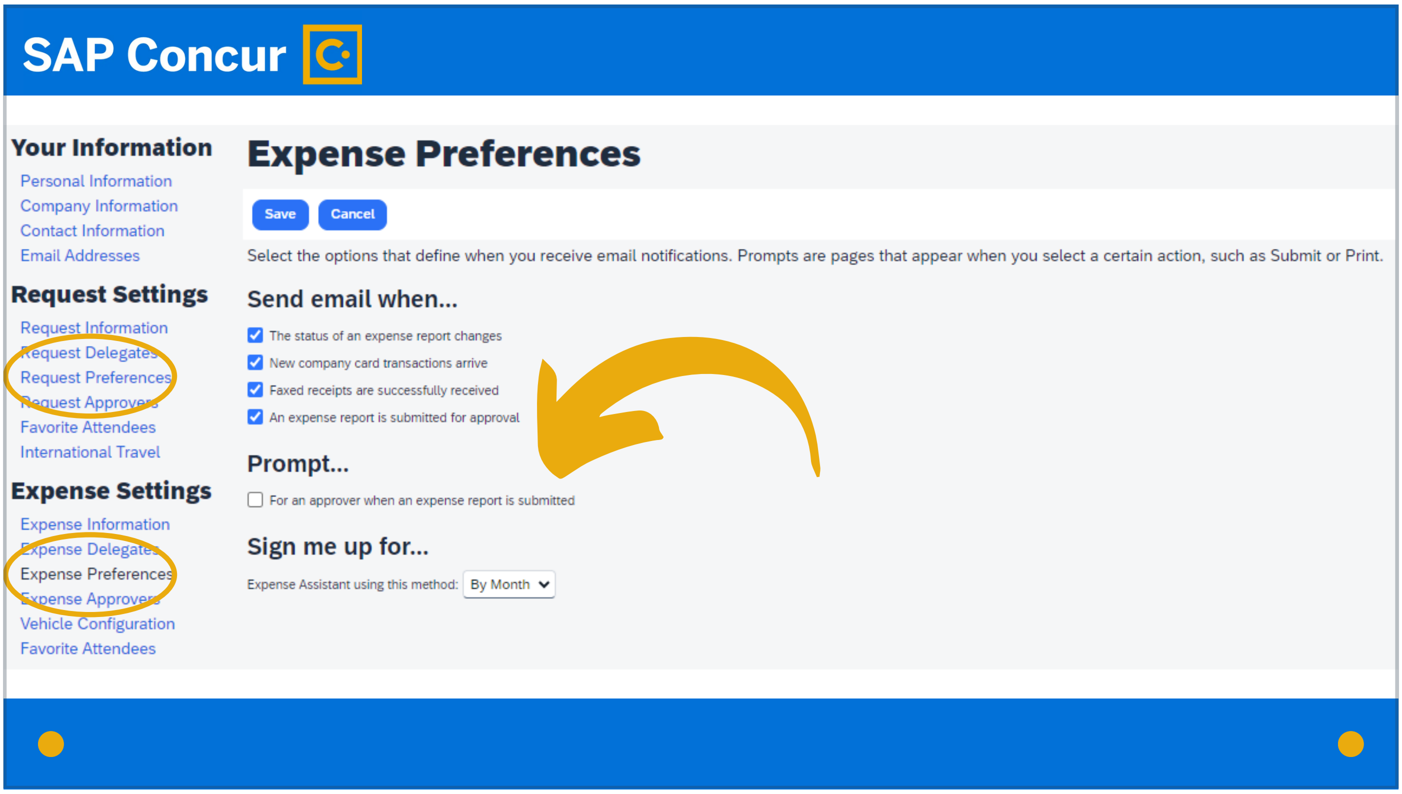
It is important to note that, although there are individual links to delegates for requests and delegates for expenses, the request and expense delegates are not unique; assigning a delegate to requests assigns it to expenses as well and vice versa.



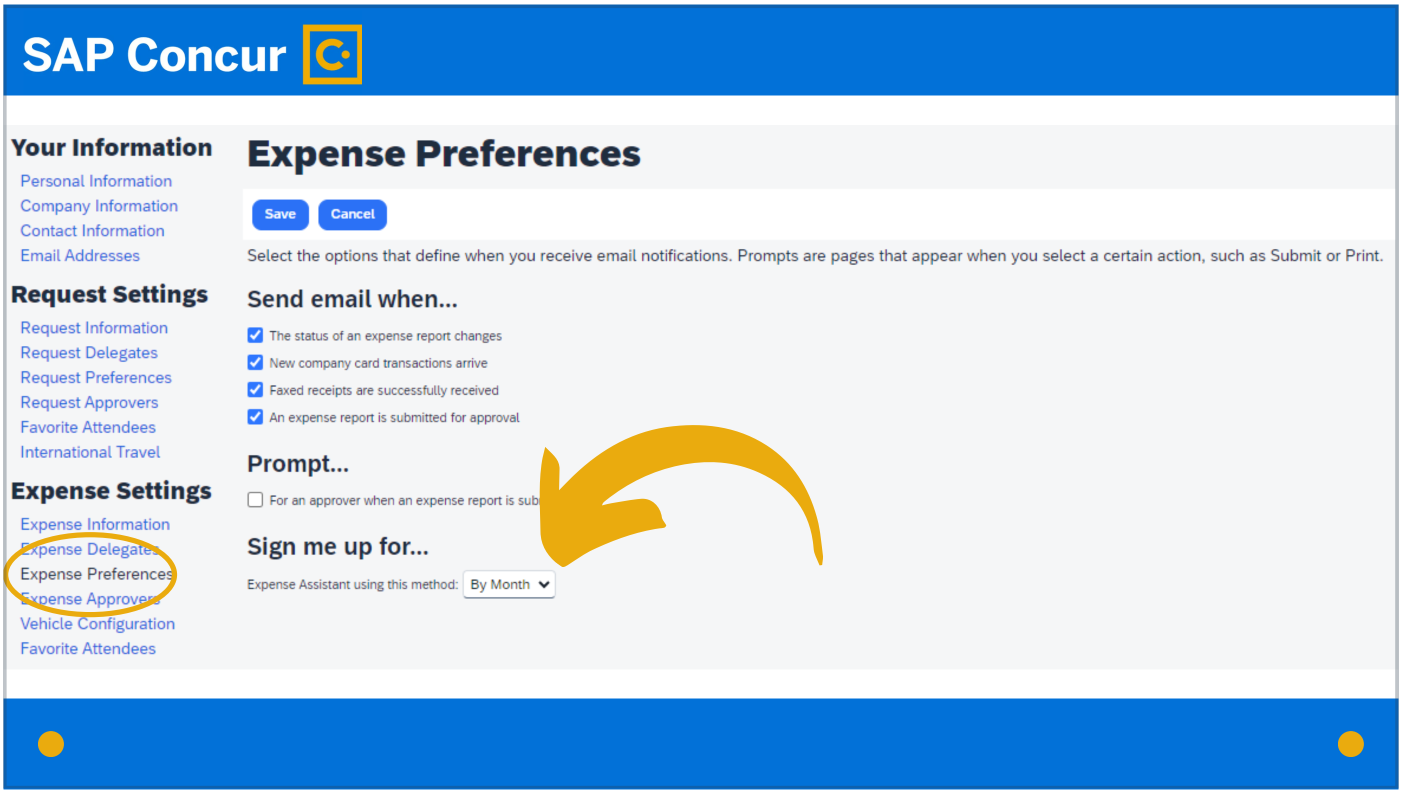
Request and expense settings also include sections for Request or Expense Approvers. Clicking on either of these links allows you to see who your default approvers are. The approvers are sourced from Human Resources and cannot be edited. If you notice an error or have questions, reach out to your department administrator.



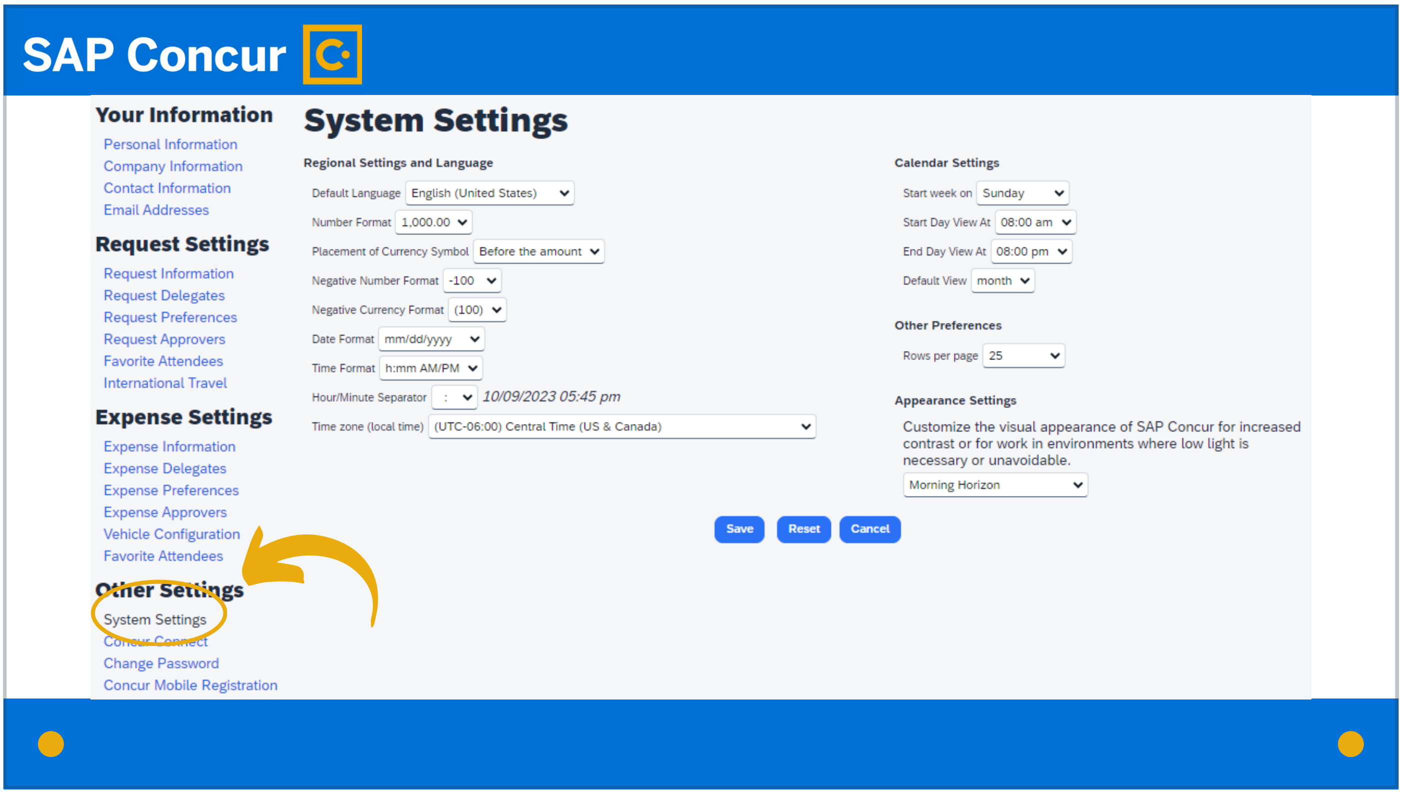
Also, for both Request and Expense settings, you can set preferences for the email notifications you would like to receive for requests and/or expense reports.



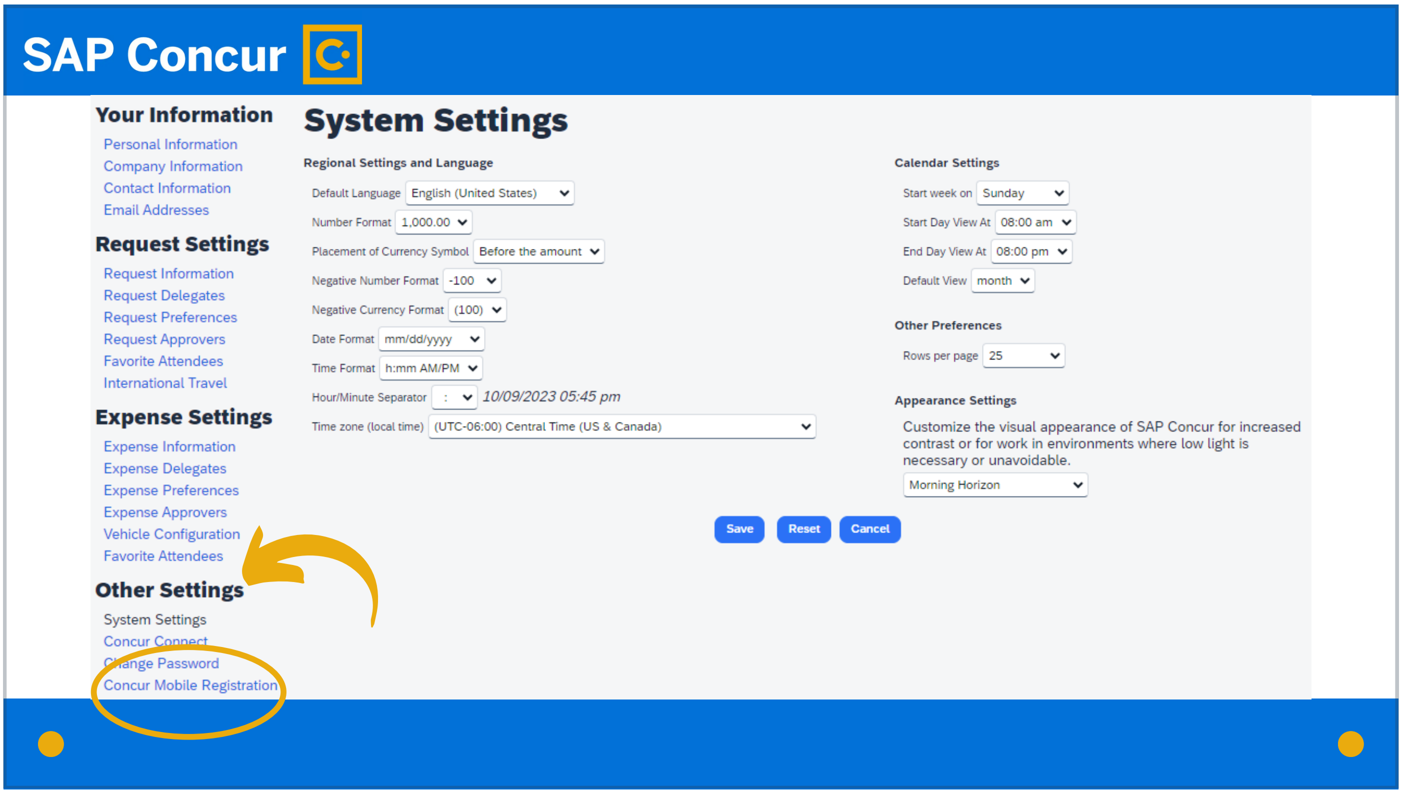
If you are an approver in your department for either requests or reports, you can set email prompts to notify you when a request or report is submitted, requiring approval.



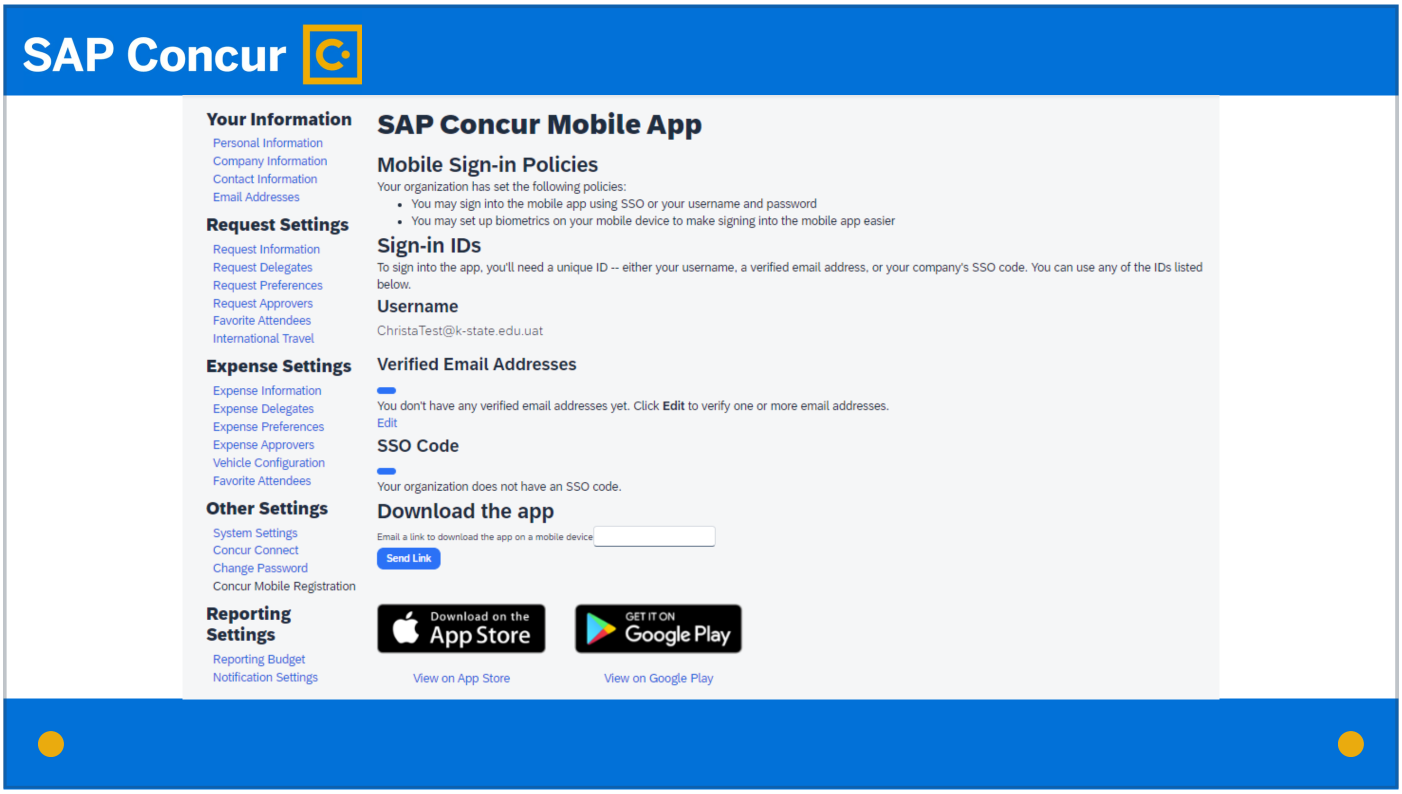
And, under Expense Settings, you can sign up for Expense Assistant. More details on Expense Assistant will be provided in our Expense Assistant training video.



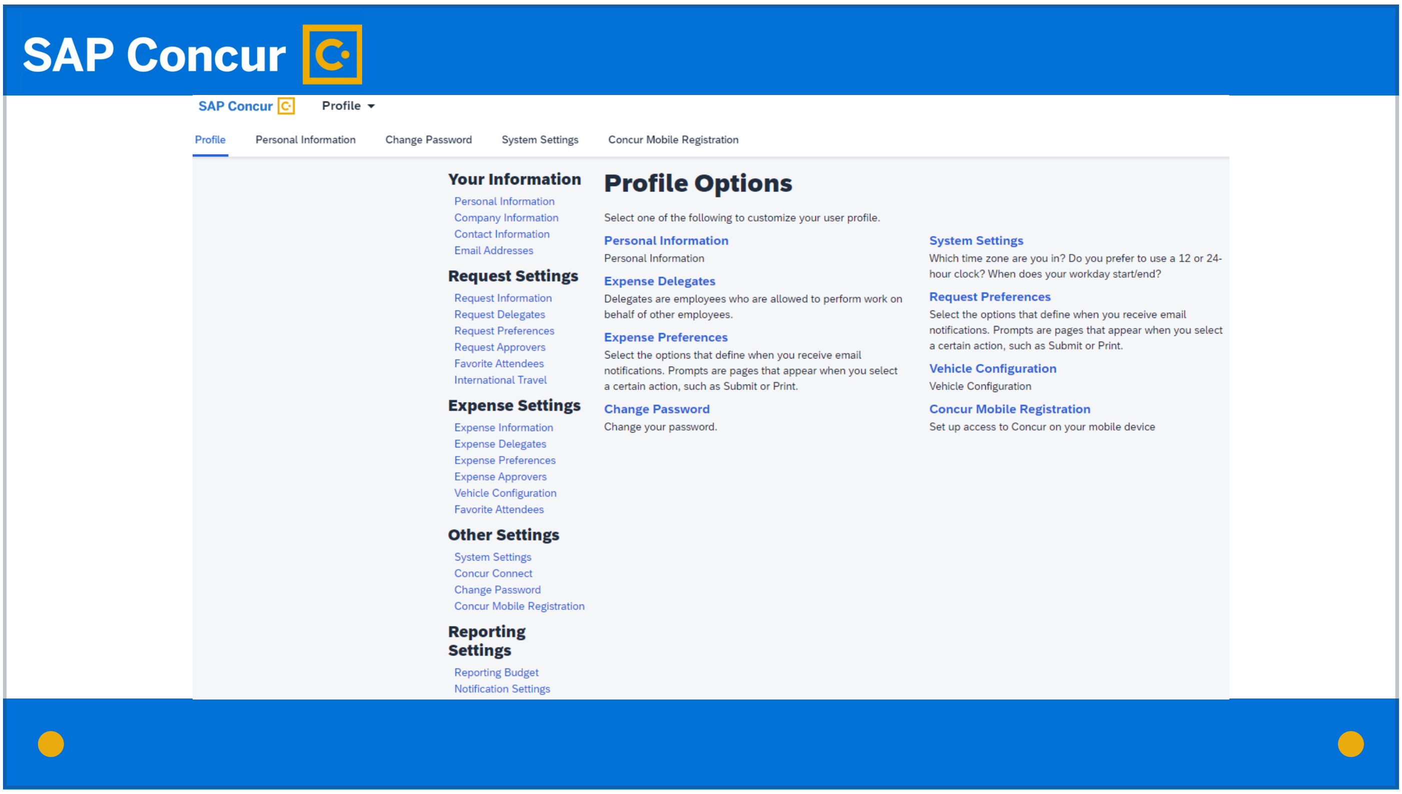
The Systems Settings section of Profile Settings, under Other Settings near the bottom of the page, allows you to set such preferences as language, date and time, the number of rows of data that appear on the screen at one time, or the visual appearance of the Concur display.



And the Concur Mobile Registration



provides details on accessing Concur’s user-friendly mobile app.



This training content has introduced the primary profile settings within Concur. The Profile Options page includes additional settings sections not covered here. Feel free to explore the full range of settings options.