Traveler Profile in Concur® Travel and Expense Personal Information, Delegations, Email and E-Receipt Activation

Last Updated: 01/21

The QRG contains instructions on completing a number of different pieces of information located in the traveler profile.
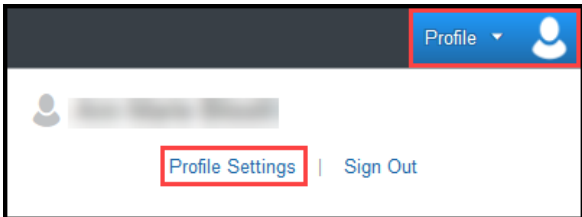
To update name, traveler programs, e-mail validation and assistant/arrangers, click Personal Information.
To update Delegates, click Delegations.
To view e-mail preferences, click Email.
To enable E-Receipts, click E-Receipt Activation.

Jump Links: Log in to Concur, Personal Information, Delegations, Email Preferences, E-Receipt Activation

Log in to Concur

Go to the **OneCampus** portal. Choose **Travel System (Concur)**. Log in using **Purdue Career Account ID** and **BoilerKey passphrase**. Click **Login**.	www.purdue.edu/employeeportal **Travel System** *Concur* **PURDUE UNIVERSITY** **Log in using your Purdue Career Account** **Login:** amblissi **Password:** •••••••• **BOILER**KEY TWO-FACTOR AUTHENTICATION Login To access the page you are requesting, a valid Purdue University career account Username and Password must be provided.

Personal Information

Click **Profile**. Click **Profile Settings**.	Profile ▾ 👤 👤 _____ _____ Profile Settings | Sign Out

Edit name to match the photo identification presented at the airport.

Company Information – Manager can be updated through the Business Office. Business Offices can view **Organizational Structure Maintenance Resources.**

Work Address
Information can be updated through the Business Office. Business Offices can complete **Personnel Change Request** form to update **Building Address**.

Home Address
Information is optional and can be updated directly from this page.

Click **Save**.

⚠ **Important Note**

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name[Required]	Middle Name[Required]	Nickname	Last Name[Required]	Suffix
Mr	William	Pete		Never	
		☐ No Middle Name			

Company Information — Go to top

Employee ID
Traveler101

Manager   Employee Position/Title
Approver 101

Save

Work Address — Go to top

Company Name   Assigned Location
Purdue University   Purdue University - West Lafayette (West Lafayette, IN)

Street
401 S Grant Street   ☐ Address same as assigned location

City   State/Province
West Lafayette   IN

Postal Code   Country/Region
47907   United States of America

Save

Home Address — Go to top

Street

City   State/Province
Lafayette   IN

Postal Code   Country/Region
47905   United States of America

Save

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Update **Contact Information**. Either a Home Phone or Work Phone is required. Mobile Phone is also required. If no mobile phone is available, enter home or work number in this field.

Verify **Email Address**. This will associate the e-mail address to your account and allow receipt images to be sent to receipts@concur.com.

NOTE: A delegate can start the verification process, but the traveler must complete the process.

Update **Emergency Contact**.

Click **Save.**

Contact Information
Go to top

Work Phone[Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office
888-470-2030			

Home Phone[Required**]
765-494-3949

Pager	Other Phone

Mobile Phone Country/Region	Mobile Phone
United States of America (+1)	765-456-6541

**You must specify _either_ a home phone or a work phone.

Save

Email Addresses
Go to top

Please add at least one email address.

▶ How do I add an email address?
▶ Travel Arrangers / Delegates
▶ Why should I verify my email address?
▶ How do I verify my email address?

⊕ Add an email address

	Email Address	Verify	Contact?	Actions
Email 1	traveler101@purdue.edu	⊘ Not Verified	Verify	Yes	✎

Emergency Contact
Go to top

Name	Relationship
Pete Boilermaker	Life Partner

Street

☑ Address same as employee

City	State/Province	Postal Code
Lafayette	IN	47905

Country/Region	Phone	Alternate Phone
United States of America	765-494-2400	

Save

Update **Travel Preferences**, if applicable.

Travel Preferences
Go to top

Eligible for the following discount travel rates/fare classes

☐ AAA/CAA ☑ Government ☐ Military ☐ Senior/AARP

Air Travel Preferences ⓘ

Seat	Seat Section	Special Meals	Ticket Delivery
Don't Care	Don't Care	Regular Meal	E-ticket when possible

Preferred Departure Airport	Other Air Travel Preferences	Medical Alerts

Hotel Preferences

Room Type	Smoking Preference	Message to Hotel Vendor ⓘ
Don't Care	Non-smoking	☐ Foam pillows

I prefer hotel that has:
☐ a gym ☐ a pool ☐ a restaurant ☐ room service ☐ Early Check-in

Accessibility Needs
♿ ☐ Wheelchair access ☐ Blind accessible

Car Rental Preferences

Car Type	Smoking Preference	Car Transmission
Any Car Class	Don't Care	Automatic

Message to Car Rental Vendor ⓘ

Click **Add a Program**, to **Add Frequent-Traveler Programs**.

Click **Save**.

Programs can be edited or deleted any time.

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

⊕ Add a Program

Screen Cleared   SAP Concur Ⓒ

Your screen has been cleared due to inactivity.

I Need More Time

Add Travel Programs

Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
1	Select a carrier		☑
2	Select a carrier		☑
3	Select a carrier		☑
4	Select a carrier		☑
5	Select a carrier		☑

Save   Cancel

Click **Add a Program**, to **Add Advantage Programs**.

Click **Save**.

Programs can be edited or deleted any time.

Advantage Programs

Your Advantage Programs for Travel Discounts — ⊕ Add a Program

Screen Cleared   SAP Concur [C]

Your screen has been cleared due to inactivity.

I Need More Time

Add Travel Programs

Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 advantage programs at a time. Select the name of the company followed by the program number and the card expiration date.

	Air/Rail Carrier	Advantage Program	Advantage Program Number	Expiration Date
1	Select a carrier			🗓
2	Select a carrier			🗓
3	Select a carrier			🗓
4	Select a carrier			🗓
5	Select a carrier			🗓

Save   Cancel

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AUXILIARY SERVICES

Quick Reference Guide
Traveler Profile in Concur® Travel and Expense
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Click **Add Ticket Credit**, to add **Southwest Ticket Credit**, if applicable.

Add **Passport** and/or **Visa**, when traveling internationally.

Click **Save**.

Southwest Ticket Credits

⊕ Add Ticket Credit

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender [Required] ○ Male ○ Female Date of Birth (mm/dd/yyyy) **[Required]** [**/**/****] DHS Redress No.⊘ TSA Pre✓ Known Traveler Number⊘

International Travel: Passports and Visas   Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports   ⊕ Add a Passport

☐ I do not have a passport

Please Note: The following information is now required for international travelers coming into the United States.

Document Type [Passport ▼]   Country/Region Of Residence [United States of America ▼]

International Visas   ⊕ Add a Visa

[Save]

Add **Assistants and Travel Arranger.**

An Assistant/Arranger can book travel in Concur on your behalf. An employee can add an assistant/arranger (but they cannot add themselves).

Click **Add an Assistant**.

Type Delegates name in **Assistant** box (Last Name, First). Click correct name, if several apprear. If assistant can book travel on your behalf, check the **Can book travel for me** box.

Click **Save**.

Assistants and Travel Arrangers   Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.
☐ Refuse Self Assigning Assistants ⊘
Your Assistants and Travel Arrangers   ⊕ Add an Assistant

101, Delegate	Can book travel? ✓	✏ 🗑
Never, William J.	Can book travel? ⛔	✏ 🗑
104, Delegate	Can book travel? ✓	✏ 🗑

[Save]

Add an Assistant

Please select the individuals within your organization that you w... perform travel functions for you.

Assistant
[Lade, Amanda E.]
☑ Can book travel for me
☐ Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their p**... primary assistant for travel.

[Save] [Cancel]

Assistant
[Lade| Amanda E.]

Ade, Lydia K.
Student Service - Cooking
LADE@PURDUE.EDU

Adeola, Olayiwola
Professor of Animal Scien
LADEOLA@PURDUE.EDU
765-494-4848

Dewhurst, Lynn A.
Temporary Service-GEAR UP
LADEWHUR@PURDUE.EDU

Lade, Amanda E.
Senior Administrative Ass
ASYNESAE@PURDUE.EDU
765-496-1608

Purdue Travel Card is uploaded and viewable under **Credit Cards**.

Click **Add a Credit Card** to add additional credit cards, if applicable.

Click **Save.**

Credit Cards   Go to top

You currently have the following credit cards saved with your profile.
                                                                    ⊕ Add a Credit Card

| VISA | 🅑 | Purdue Visa Travel Card | ***1111 | Exp: 01/2022 | ⊕🏦🖨🗂 | ✏ 🗑 |

[Save]

Delegations

A delegate has the ability to book travel and create travel requests and/or expense reports in Concur. In Concur, a delegate has two roles:

- Assistant/Arranger
- Request/Expense Delegate

Please discuss delegation with your Business Office, before editing or deleting.

Go back to **Profile Settings** and select **Expense Delegates.**	
Select **Expense Delegates** from the toolbar on the left or from the middle of the page.	
Click **Add** to search by name. Type employee's name (Last name, First) in **Search** box. Click **Add.** Click **Save.** An assistant/arranger cannot add themselves as a request/expense delegate for a traveler. (You cannot search and find your own name in the search function.)	
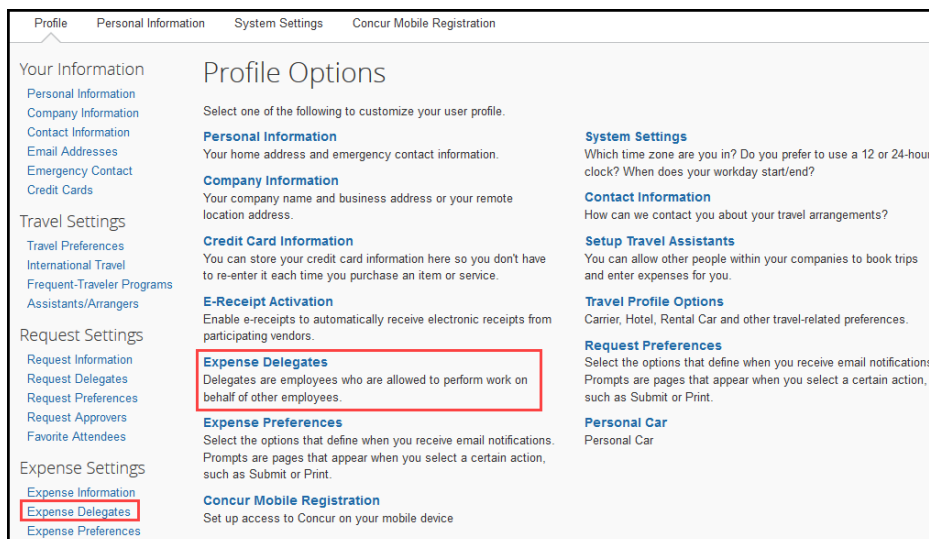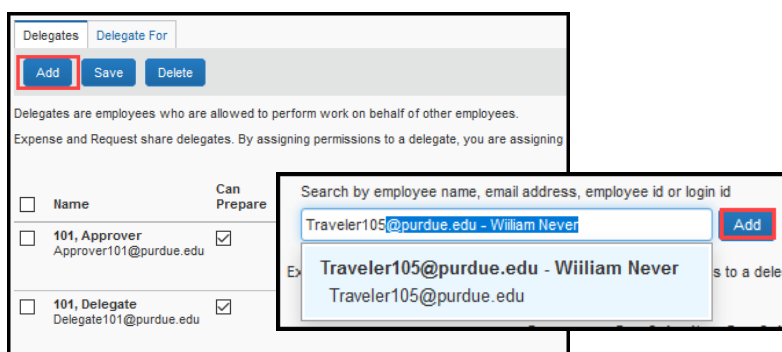
Email Preferences

Preferences for the **Travel Request Sumbitted** email notification that is automatically generated upon submission of a travel request cannot be changed. The Traveler, Traveler's Delegates,Traveler's Supervisor, Funding Source Chief, Co-PI and Fiscal Approver will all receive the email regardless of any email preferences set within the Concur system.

Quick Reference Guide

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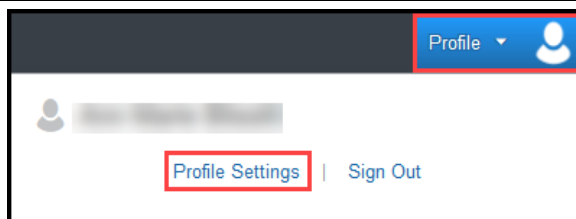PURDUE UNIVERSITY® | Procurement Services AUXILIARY SERVICES

Email options are viewable through Preferences. Select **Request** or **Expense Preferences** to vew email notifications that can be selected or removed.	**Request Preferences** Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. **Expense Preferences** Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
Check/uncheck boxes to indicate which notification emails to receive. Emails generated from Concur will have Autonotification@concursolutions.com listed as sender. Delegates recieve the same emails as the traveler. Emails cannot be disabled for a traveler, and yet available for a delegate. Click **Save.**	**Request Preferences** Save Cancel Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. Send email when... ☑ The status of a request changes ☑ A request is submitted for approval Prompt... ☐ For an approver when a request is submitted **Expense Preferences** Save Cancel Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. Send email when... ☑ The status of a cash advance changes ☑ A cash advance is submitted for approval ☑ The status of an expense report changes ☑ New company card transactions arrive ☑ Faxed receipts are successfully received ☑ An expense report is submitted for approval Prompt... ☐ For an approver when an expense report is submitted Display... ☐ Make the Single Day Itineraries page my default in the Travel Allowance wizard

E-Receipt Activation

Select **E-Receipt Activation** from **Other Settings** in **Profile**.	Profile Personal Information System Settings Concur Mobile Registration **Your Information** Personal Information Company Information Contact Information Email Addresses Emergency Contact Credit Cards **Travel Settings** Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers **Request Settings** Request Information Request Delegates Request Preferences Request Approvers Favorite Attendees **Expense Settings** Expense Information Expense Delegates Expense Preferences Expense Approvers Personal Car Favorite Attendees **Other Settings** E-Receipt Activation System Settings **Profile Options** Select one of the following to customize your user profile. **Personal Information** Your home address and emergency contact information. **Company Information** Your company name and business address or your remote location address. **Credit Card Information** You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service. **E-Receipt Activation** Enable e-receipts to automatically receive electronic receipts from participating vendors. **Expense Delegates** Delegates are employees who are allowed to perform work on behalf of other employees. **Expense Preferences** Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. **Concur Mobile Registration** Set up access to Concur on your mobile device.
Agree to **E-Receipt Activation**, to enable the automatic collection of electronic receipts from participating vendors.	**E-Receipt Activation** Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more, click here. Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator. E-Receipt Activation ✕ Concur can enable the automatic collection of the electronic receipts and folio data ("e-receipts") generated by your transactions with participating travel suppliers ("Participating Suppliers"). Participating Suppliers in Concur Travel search results are designated with an "e-receipt enabled" label. By clicking "I Agree" below to turn on the e-receipts functionality, you authorize Concur and its corporate affiliates to receive, transfer and use e-receipts generated by your transactions with Participating Suppliers in connection with Concur services, including air, rail, hotel, car rental, and other ground transportation suppliers, and you authorize such Participating Suppliers and their respective agents and affiliates to share such e-receipts with Concur. To retrieve e-receipts I Agree I Decline