Setting Up Your Profile

Log into Concur UA Concur Travel Portal:  www.alaska.edu/concur

UA username and password (SSO) credentials are used to log in. Click on Profile then choose profile settings. Several fields will pre-populate for you, please review this information for accuracy.

Personal Information, Required Fields:

1. You must enter your middle name as shown on your photo identification.

2. Contact Information: requires at minimum a Work and/or Home Phone.

3. Email Addresses: UA email will pre-populate, you will need to verify. A verification code will be emailed to you and you must enter this into Concur then choose OK.

4. Travel Preferences: although not required fields it is strongly encouraged.

Request and Expense Settings, Required Fields:

1. Request/Expense Information. The funding information is pulled from your primary job record. The default funding source can be updated if necessary.

2. Request/Expense Delegates. For detailed information see Page 2.
   - Delegates Tab:
     - You can change what your delegate can do and see on your behalf, add or delete delegates, assign temporary approval delegate.
   - Delegate For Tab:
     - You will see a listing of those who have made you a delegate on their behalf

3. Request/Expense Preferences.
   - Choose when to receive email reminders, prompts and how your wizard displays.

4. Request/Expense Approvers.
   - If a department chooses to have a second approver (i.e., fiscal officer) enter them as a Default approver. Begin typing approver’s name, id or email address, then select the appropriate individual. If you want an approver 2 in both Request and Expense you must set up separately. Please keep in mind approver 2 will receive the request prior to your supervisor or cost object approver (COA).
Setting Up A Delegate

In Concur, a delegate is a person who you are authorizing to act on your behalf. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Assigning Delegates:

1. Upon logging into Concur, click the Profile dropdown and select profile settings.
2. Click Expense Delegates (page menu or from left side menu (i.e.,) Request Delegates)
3. Choose Add
4. Type in your search (this could be the last name, email, etc.)
5. The list of options will filter based on your search parameters
6. Choose the appropriate user from the list
7. If it doesn’t automatically add the user to your list, click the add button next to the search field.
8. Assign the permissions you wish to give this delegate

- Can Prepare-This user may prepare expense reports on your behalf. You will still be required to submit the report
- Can Book Travel-Allows this person to book travel on your behalf. Delegates receive all the same emails as the traveler, regardless of who books
- Can Submit Reports-Submitting an expense report is the responsibility of the employee who incurred the expense. Traveler must still approve and submit.
- Can Submit Requests-Requests will be forwarded to supervisor or cost object approver (COA) directly
- Can View Receipts-Should check by default when selecting Can Prepare. This allows this user to view your receipt store, ereceipts, receipts images, etc.
- Can Use Reporting-If you have any reporting rights (typically restricted to dept heads) this option enables user to access reporting on your behalf.
- Receives Emails-This user will be copied on all emails generated by Concur addressed to you
- Can Approve-Sharing the ability to approve reports with this user (peer or above)
- Can Approve Temporary-This is a date range. Gives this user temporary access to approve reports and requests on your behalf. Should be someone at your level or above
- Can Preview for Approver-This user may preview, but not approve
- Receives Approval Emails-This user will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

9. Click Save
10. Once you have saved, the next time your delegate logs into Concur, they will be able to perform the functions you have given them.