CONCUR | GETTING STARTED CHECKLIST

For undergraduate students traveling for enrichment experiences

OVERVIEW

This document provides an overview of required and recommended Profile information a new user should review when logging into Concur for the first time.

1. LOGGING IN

- ☐ Navigate to any web browser.
- ☐ Access Concur by clicking on the following: Concur SSO, or navigate directly to the Travel Services page at https://travel.uconn.edu

2. PROFILE | PERSONAL INFORMATION

➢ Complete the **REQUIRED PROFILE** fields:

- ☐ Home OR Work Phone
- ☐ Date of Birth

NOTE: Confirm that the first, middle, and last names shown on your Concur Profile, appears exactly as these appear on the photo identification that you will be presenting at airport security.

➢ **Work and Home Address** | Confirm your **Home Address** information.

- ☐ Update Home Address fields, when necessary

➢ **Email Addresses** | Verify your email address to automatically associate information forwarded from the verified email address to your Concur account.

- ☐ Verify your uconn.edu email address
- ☐ Enter the code (sent to your email) and click OK.

NOTE: Click **Save** from the Personal Information view of your Profile to successfully save all changes made to this section of your Profile.

3. PROFILE | DELEGATES

➢ **Delegates** | Delegates can help prepare, submit, preview, and (with appropriate permission to Concur) Approve Requests and Expense Reports on behalf of another user.

- ☐ From the **Request Delegates** link, click **Add.**
- ☐ Search for a UConn employee to grant Delegate permission to. Search for Susan Ruggiero.
- ☐ Check off **all available boxes** to grant delegation access (see screenshot at bottom of this page) and then click **Save.**

NOTE: For details on how to add a delegate after you have completed the initial setup of your profile, refer to page 2 of these instructions. **Please ensure that you select Susan Ruggiero and give her all available permissions so she can enter information in Concur on your behalf.**

	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Ruggiero, Susan susan.ruggiero@uconn.edu	☑	☑	☑	☑	☑	☐	☐	☑	☑

Request Delegates — Delegates | Delegate For — Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
You may assign a temporary approver for a maximum of 120 days.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

OVERVIEW

A Delegate is an individual designated in Concur to assist with tasks such as: creating and submitting Travel Requests, creating Expense and Company Billed Statement Reports, approving Travel Requests and approving Expense and Company Billed Statement Reports on behalf of another Concur user.

HOW TO ADD A DELEGATE

Below is a list of the steps you will take in your Concur profile to add a preparer or approver delegate.

1. Navigate to any web browser.

2. Access Concur by clicking on the following: Concur SSO.

3. From the Concur homepage, click **Profile** and then click **Profile Settings**.
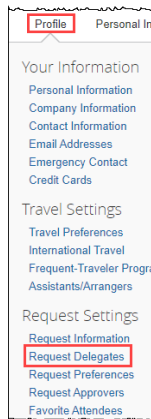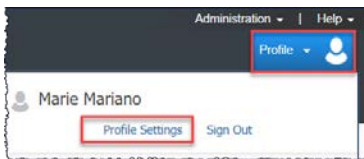
4. On the left of your screen select **Request Delegates.**

5. Click **Add** and then type in your search information.

6. Once the name you are searching for appears, verify all the information is correct. *A filtered dropdown list of matching names displays.*

7. Click on the desired name in the dropdown.
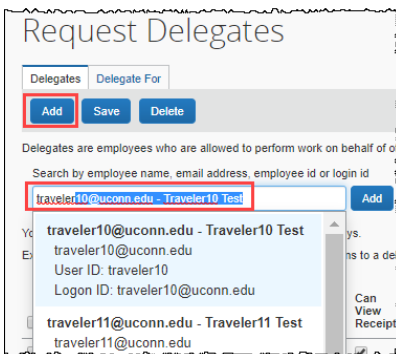
8. Click the check boxes to assign the permission you would like to give to each delegate.
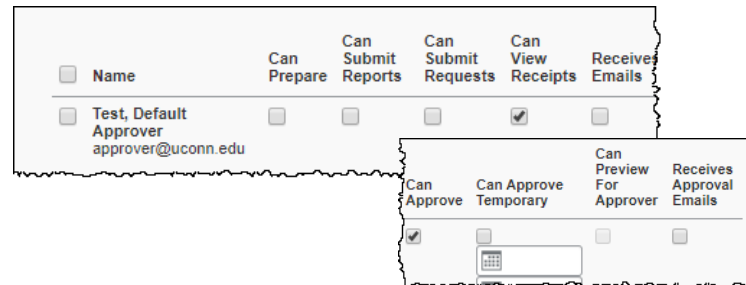
9. Click Save. Once you click **Save**, the next time your delegate logs into Concur, they will be able to act as your delegate and perform the tasks you have granted them permission for.