
Concur Job Aid – How to set up your profile

udel.edu/concur

Log into Concur > Profile > Profile Settings > Personal Information

The screenshot displays the SAP Concur user interface. At the top, the navigation bar shows 'SAP Concur' and 'Expense' tabs. The user is logged in as 'Winkler, David N'. Below the navigation bar, there are buttons for 'Start a Request', 'Start a Report', and 'Upload Receipts'. The main content area shows 'TASKS' with 'Open Requests' and 'Available Expenses' sections, both indicating 'User currently has no active requests/expenses'. A 'My Profile - Personal Information' form is overlaid, featuring a 'Jump To' dropdown set to 'Personal Information' and a 'Choose' button. A 'Please Note' section provides instructions for profile setup, including requirements for letters and numbers, no special characters, US state codes, frequent traveler numbers, and removal of expired passports and credit cards. The form fields include Title, First Name, Middle Name, Nickname, Last Name, and Suffix.

Verify that your name *exactly* matches the photo ID you will use to travel (passport or driver's license) **First and Last name are imported from the HR system.** Middle name needs to be entered by the user (once saved you would need to contact Ariadne Lopez to make any changes)

Company Information – Review for accuracy.

Work Address – Save any necessary changes. **This should be 30 E Main St Newark DE 19716**

Home Address – This section is optional.

Contact Information – *Either* a work or home phone number is required. You may enter both. You may register a mobile device to receive Safety and Business alerts.

Email Addresses – Add and verify any email addresses that you or any will use to send receipts or travel itineraries to Concur. *You will receive an email with a code that you will need to enter in order to complete the process.*

Optional Sections:

Emergency Contact	Travel Preferences
Frequent Traveler Programs	My Travel Network
Advantage Programs	Unused Tickets
Southwest Ticket Credits	TSA Secure Flight
International Travel	Assistants and Travel Arrangers – N/A

Credit Cards – Add your **UD Credit Card information** if applicable. Check the items that the card will be used for. The billing address should be 222 S Chapel St Newark DE 19716



Don't forget to click the Save button.

Expense Delegates – Under Expense Setting section, click the Expense Delegate link.

1. Click the Add button

2. Type "Lopez, Ariadne" and it should pop up in the drop down, click on the name and click add button.

3. Check the boxes for Can Prepare, Can Submit Requests and Can View Receipts only

4. Click the Save button

Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails
Gwaltney, Katie GWALTNEY@UDEL.EDU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lopez, Ariadne ARIADNE@UDEL.EDU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>