University of Houston Concur Instructions

How to set up a new Concur user account

Employee Account

Go to PASS and click on Concur Travel Management icon.

If the employee is not already set up as a Concur user, the self-registration page will appear. Complete the required information and save. Then refer to instructions on how to set up expense delegates so the travel coordinator will be able to assist with your travel arrangements.

Non-Employee Account

Contact the travel coordinator (Brenda Stevens, <u>bstevens@uh.edu</u>) to submit the Concur Non-Employee Access Form for all guests visiting the Department of Computer Science. It is required that a travel request is created for travel expenses that will be paid by UH or reimbursed to the guest.

University of Houston Concur Instructions How to Select Delegates to Prepare TRs and/or Expense Report

Note: You can select delegates to prepare documents for you in this page. However, this page will not allow you to select delegates to approve other employee's documents on behalf of you. To select delegates to approve, complete "Concur Supplemental Form for Employee Access Updates" and submit it to Kirk Williams (kawilli4@central.uh.edu) or Catherine Chan (cchan@central.uh.edu).

Step 1: Login to Concur and click on "Profile", and click on "Profile Settings".



Step 2: On the menu, select "Expense Delegates"

Profile	Personal Information	Change Password System Settings	Mobile Registration
Your Info Personal II Company I Contact Ini Email Addi Emergency Credit Carr Travel Se Travel Se Travel Prei Internation Frequent-T Assistantsi Request In Request D Request P Request A Favorite Al Expense	ormation nformation formation formation resses y Contact ds ettings ferences al Travel Traveler Programs /Arrangers Settings nformation elegates references pprovers ttendees Settings of comation	Profile Options Select one of the following to customize your Personal Information Your home address and emergency contact information. Company Information Your company name and business address of your remote location address. Credit Card Information You can store your credit card information he so you don't have to re-enter it each time you purchase an item or service. 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 recei email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print. Mobile Registration Set up access to Concur on your mobile devi	user profile. System Settings Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end? Contact Information How can we contact you about your travel arrangements? Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you. Travel Profile Options Carrier, Hotel, Rental Car and other travel- related preferences. 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. Change Password Change your password.

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Step 3: You are now in the Expense Delegates page. Click on "Add".



Step 4: Enter an employee who can prepare Travel Requests and/or Expense Reports for you. Then click on "Add".

Expense Delegates	
Delegates Delegate For	
Add Save Delete	Choose:
Delegates are employees who are allowed to perform work on behalf of other employees. Search by employee name, email address, employee id or logon id Delegate, Cathy Add Cancel	Stevens, Brenda; bstevens@uh.edu Davis, Debra; debbi@uh.edu

Step 5: Place a checkmark in the appropriate boxes. Then, click on "Save".

Expense Delegates
Delegates Delegate For
Add Save Delete
Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
Delegate, Cathy shyurus@central.uh.edu	✓			✓