

LOGGING IN

Navigate your browser to <http://www.concursolutions.com>

1. In the **UserName** field, enter your Emich email address (jdoe@emich.edu).
2. In the **Password** field, enter “welcome”. You will be prompted to change your password on your first login.
3. Click the **Login** button.

Verify Personal Information

Click on the **Profile** button in the upper right. Choose **Profile Settings**. Click on **Personal Information**.

There are four pieces of Personal Information that are required for each use of the Concur System

Verify Traveler Name

Your name has been loaded into the system. Review your first name and last name for accuracy. Enter your middle name.

- If your name information is incorrect, contact Accounts Payable at 487-0022.
- If your name information does not match your photo ID exactly you could be turned away from an airport gate.

Email Address

Two phone numbers are required for each traveler.

1. Verify your work phone. If you work phone is incorrect contact Accounts Payable at 487-0022.
2. Enter a home phone number. You may enter your cell phone in the home phone field.

Email Address

1. Click to **Verify** link next to your emich email address. If your email address is incorrect contact Accounts Payable at 487-0022.
2. Click the **OK** button in the pop up window.

You will receive an email with a verification code. Copy the verification code.

1. Paste the verification code into the **Enter Code** field.
2. Click the **OK** button. The Email Verification Status window is displayed.
3. Click the **OK** button
4. You should see the green check mark and the Verified label next to the email address.
5. Click the Save button under the Contact Information box.

TSA Secure Flight

Enter your Gender and Date of Birth. (required)

Change Password

In the left-hand navigation column, under **Other Settings**, click on the **Change Password** link.

1. In the **Old Password** field, enter the password you were given in the Concur Demo workshop.
2. In the **New Password** field, type a new password that you will be able to remember.
Your password must be at least 7 characters long. It can contain letters, numbers and symbols, It cannot contain spaces.
3. In the **Password Hint** field, enter a hint that will help you remember your password. (required)
4. Click the **Submit** button to change your password.

Verify FOAPAL

In the left-hand navigation column, under Expense Settings, click on the Expense Information link.

The values displayed on the Expense Information page show the default codes for your department within the EMU Chart of Accounts. Pay special attention to the **Organization** field and the **Fund** field; this will indicate the default Fund and Org that will be assigned to each of your transactions in Concur.

You can change any of these values as needed when charging different departmental accounts.

If your department utilizes Activity or Location codes you need to enter these codes manually. If you enter an Activity or Location code on this screen, each transaction will default to that Activity and/or Location code.

If there are any problems with your Expense Settings, contact Accounts Payable at 487-0022.

Verify Approver

In the left-hand navigation column, under **Expense Settings**, click on the **Expense Approvers** link.

The name and email address of your approver will be displayed. If there are any problems with your assigned approver, contact Accounts Payable at 487-0022.

Grant accounting approvals are built into the system for any Grant-related expenses. You will not see Grant Accounting listed as your approver.

All approvers have the option to **Approve & Forward**, if another person’s approval is needed.

Add a Delegate

A Delegate will be able to book travel for you and process your expense reports. You will still need to submit expense reports yourself. To set up a Delegate follow these steps:

1. In the left-hand navigation column, under **Request Settings**, click on the **Request Delegates** link. The **Request Delegates** screen will be displayed.
2. Click the **Add** button. A search field will be displayed.
3. In the search field, begin typing the name of the person you want to add as a delegate. A list of names will appear below the search field. The more letters you type, the fewer names will appear on the list.
4. Click on the name of the person you want to select. That person will be assigned as your Delegate.
5. Select the appropriate task checkboxes.
6. Click the **Save** button.

Emergency Contact

On the My Profile page you can enter an Emergency Contact.

1. Enter the name of your **Emergency Contact**.
2. Use the pull-down menu to indicate your relationship with your **Emergency Contact**.
3. If your **Emergency Contact** has the same address as you, you can check the **Address same as employee** box.
4. If your **Emergency Contact** has a different address, uncheck the box and enter the appropriate address information.
5. You can enter two different phone numbers for your emergency contact.
6. Click the **Save** button below the Emergency Contact box.

Travel Preference

On the **My Profile** page you can enter **Travel Preferences**. These include:

- Eligibility for discount travel rates
- Air travel Preferences
- Hotel preferences
- Car rental preferences
- Frequent traveler programs

Once you have entered your Travel Preferences, click the Save button below the Travel Preferences box.

Email Notifications

On the **My Profile** page you can configure your Email Notifications.

1. In the left-hand navigation column, under **Other Settings**, click on the **System Settings** link. The **System Settings** screen will be displayed.
2. In the **Email Notifications** box, you will see all the possible notifications you can receive. By default all the boxes are checked. Uncheck a box if you do not want to be notified for that task.
3. Click the Save button below the **Email Notifications** box.