

Updating your Profile in Concur for Non-Travelers who Have Procurement Cards

Some faculty and staff who do not travel or their delegate handles all aspects of their travel will not need to use Concur often. However, if you have a UNF procurement card (p-card), you will need to review and adjust your profile in Concur on March 28 or soon afterwards. Please follow these very easy steps to update your Concur profile.

Login to Concur

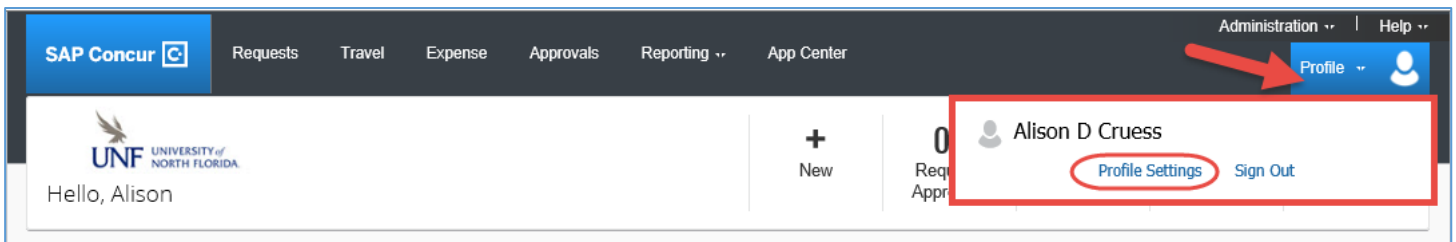
1. Navigate to <http://mywings.unf.edu> and login using your UNF ID and password.
2. Go to the **Staff** tab. Look under **My Applications** and click on the Concur link. It will automatically log you in to Concur.

If you have Login Issues, please contact the following depending on the situation:

- If you are a first time traveler or believe your approver(s) may not be configured in Concur – **email banner-finance@unf.edu**
- Otherwise, contact the ITS Help Desk at **helpdesk@unf.edu** or call **904-620-4357 (HELP)**

Access Your Concur Profile

1. After logging to Concur, click on **Profile** in the upper right-hand corner. A drop down will appear.
2. Click on **Profile Settings**.



Review and Update Your Delegate Information

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

1. You will need to review and adjust the permissions for your delegates. Your delegate will prepare your p-card expense reports (formerly called 'coding your p-card'). You can get to this section by clicking on **Request Delegates** or **Expense Delegates**. If you do not see these, click on **Profile**.
2. Review the names listed and the settings for each. Please consider the following when assigning permissions to your delegates. After making changes, click **Save** when you are done.
 - a. **Can Prepare:** Delegates can prepare expense reports on your behalf and notify you when complete. You are still required to submit the report yourself.
 - b. **Can Submit Reports:** Delegates can submit Expense Reports. **It is important to check this box if your delegate codes your p-card.**
 - c. **Can Submit Requests:** **Do not check this box. Florida statute states that the traveler must submit their Travel Request (a delegate can create the request but the traveler must review and approve it.).**
 - d. **Can View Receipts:** Delegates can view uploaded receipts. This will be set by default if you select the **Can Prepare** Option.
 - e. **Receives Emails:** Delegate will receive the same Concur emails as you. **This is recommended for your primary delegate.**
 - f. **Can Approve:** Delegates can approve expense reports.
 - g. **Can Approve Temporary:** Set a time limit that a delegate can approve on your behalf. This is a great feature to use when you are on vacation or out of the office for several days.
 - h. **Can Preview for Approver:** Delegate can view expense reports in your approval queue but cannot approve the reports.
Receives Approval emails: Delegates will be copied on approval related emails.

Request Delegates

Delegates Delegate

Add Save Delete

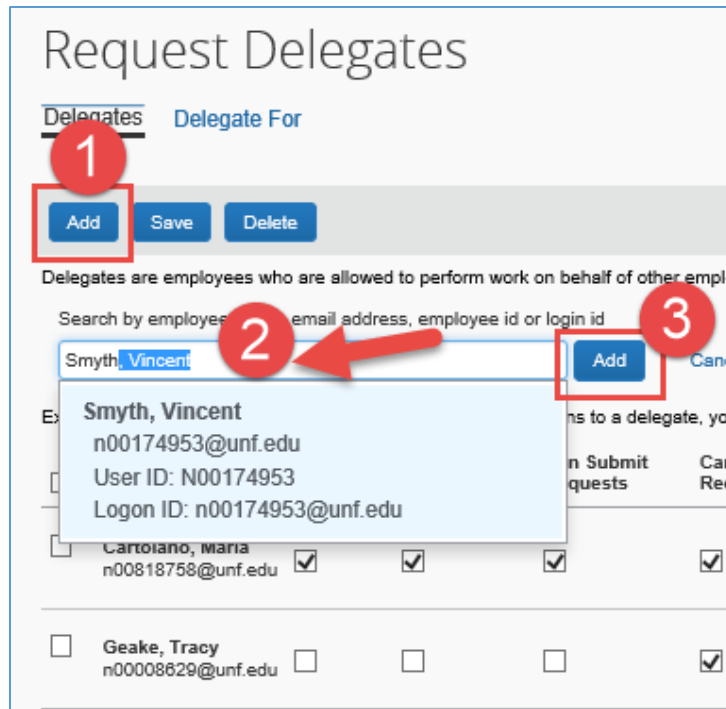
Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	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
<input type="checkbox"/>	Cartolano, Maria n00818758@unf.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Geake, Tracy n00008629@unf.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Smyth, Vincent n00174953@unf.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

Check this box if your delegate codes your p-card.

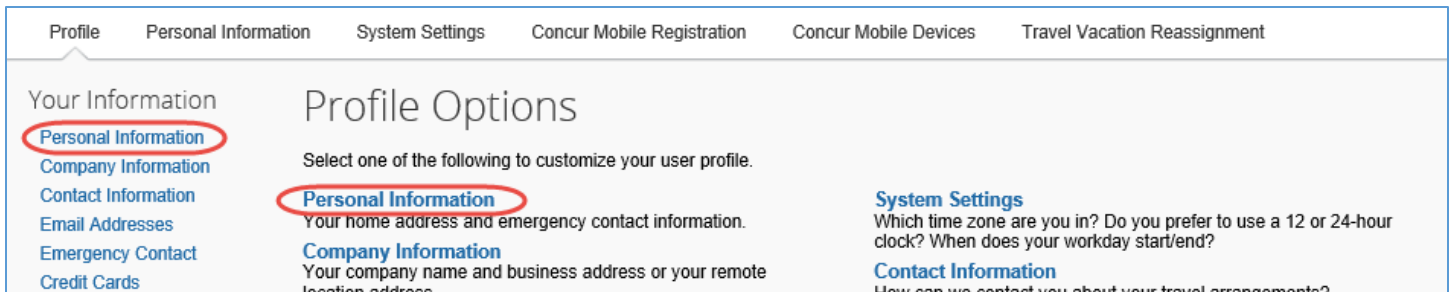
Do not check this box. Florida statute states the traveler must approve their own Requests.

- To **add a delegate**, click the **Add** button. Type their name in the box that appears, select their name and then click **Add** next to their name. Check the appropriate boxes next to their name giving them the permissions they will need. Click **Save when you are done**.



- To remove a delegate, check the box next to their name and click the **Delete** button. Click **Save when you are done**.

Review and Update your Personal Information (for non-Travelers or those whose Delegates Handle their Travel)



- Click on **Personal Information** under **Your Information** or under **Profile Options**.

- a. Some fields will be grayed out, such as your name. If your name is incorrect, contact Human Resources. The areas you will want to review and update if necessary are:
 - i. **Home address** – type in your current home address. Click **Save**.
 - ii. **Contact Information** – Add your work and/or cell number, if you have them. Click **Save**.

NOTE: If you want to be able to take a picture of a P-Card receipt with your mobile device and email it, so it appears in Concur, follow the steps below. If you will continue to turn in paper receipts, you can skip this section.

Having your email addresses **verified** will enable you to email your receipts (or pictures of your receipts) to RECEIPTS@Concur.com. When this is done, you or your delegate will be able to see your expenses in Concur (under Concur Expense).

2. **Add additional or verify email addresses.** By default, your UNF email address (the version that uses your N Number) has been added for you. You will also need to add your friendly email alias (the one you may have selected as a new employee or that you use on your business cards). Contact the ITS Help Desk if you do not know your friendly email alias.
 - a. Click **Add an email address**. Enter the email address and check the box on whether you want the address used for **Travel Notifications**. (We recommend you select **Yes**.)

The image displays two screenshots of the Concur 'Email Addresses' interface. The top screenshot shows the 'Add an email address' form. It includes a table with columns for 'Email Address', 'Verification Status', 'Verify', 'Contact?', and 'Actions'. The first row shows 'Email 1' with the address 'n00007620@unf.edu', a 'Not Verified' status, and a 'Verify' button. Below the table is a form to 'Enter email address' and a 'Contact for Travel Notifications?' section with radio buttons for 'Yes' and 'No'. A yellow box highlights a 'Verification Email Sent' pop-up message that says 'An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.' The bottom screenshot shows the 'Verify' process. It features a table with 'Email 1' and 'Email 2'. The 'Verify' column for 'Email 1' shows a 'Check email for code' status and a 'Resend | Cancel' button. Below this is an 'Enter Code' field and an 'OK' button. A red box highlights the 'Verify' button and the 'Enter Code' field. Another red box highlights the 'Add an email address' button in the top right corner.

- b. You will then need to verify the email address. Click **Verify** and an email will be sent to the email address you entered. This sometimes can take 15-45 minutes. Once you receive the email, copy the long **code** and paste it in the verify field of Concur and click **OK**.
- c. Click **Save** when you are done.

3. **Emergency Contact** – In the section called Emergency Contacts, enter the name and information of someone who can be reached in an emergency while you are traveling. Click **Save**.

Emergency Contact Go to top

Name Relationship

Street Address same as employee

City State/Province/Region Postal Code

Country Phone Alternate Phone