Step A: Update Personal Information

For more detailed instructions, including adding delegates and frequent travel programs, the online module “Updating Your Concur Profile” is available in The Learning Exchange.

1. Access your profile on the Profile tab.
2. Click Personal Information.

If the name listed in your profile does not match your name as it appears on the photo ID used during travel, contact HR to make necessary changes. Concur’s standard required fields for reimbursement are indicated in red. However, if booking travel, Vanderbilt also requires the Home and Work Address fields. Confirm all data is in the correct format, with no punctuation or special characters, and that a standard 2-letter state postal code has been used.

Step B: Update Credit Card Information

In order to book travel, a personal credit card or Vanderbilt T&E card in your name must be registered within your Concur profile.

1. Scroll down within Personal Information to the Credit Cards section.
2. To add a credit card, click + Add a Credit Card.
3. Complete the required credit card information as necessary. (Once entered, card information will be encrypted.)
4. Check the appropriate box(s) to use this card as the default for travel expenses including Plane Tickets.
5. Click Save.

Step C: Enter Expense Information

1. On the left-side panel, select Expense Information from Expense Settings.
2. Select a default Cost Center. Check with your departmental administrator if you need assistance determining a default cost center. Do not select a Federal Center as your default.
3. Click Save.

Step D: Enter Bank Information

Bank information is required for the direct deposit of employee expense reimbursement.

1. On the left-side panel, select Bank Information from the Expense Settings section.
2. Enter the required information (indicated with red bar I) for your bank account for the direct deposit of your reimbursement.
3. Click Save.

Once you have entered your bank information, Concur will deposit one cent into the account for account verification purposes (a “penny test”). Expense reports with Amount Due Employee cannot be submitted for reimbursement until the account is verified.

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Vanderbilt Financial Training
A Travel Assistant can perform travel booking and/or travel profile updates. An Expense Delegate can create or approve expense reports. Although the same person may perform both the Travel Assistant and Expense Delegate roles, each role must be assigned separately in your Concur profile.

To add a Vanderbilt employee to your Travel Assistants in Concur:

1. Login to Concur at vanderbilt.edu/ebiz/ and select the Profile tab to access your Concur profile.
2. Under the Travel Settings section, click Assistants/Arrangers.
3. In the Assistants and Travel Arrangers section, click Add an Assistant to open the search box.
4. Type the name of the employee you would like to assign as an Assistant.
5. Check the box to select Can book travel for me.
6. Click Add to add the employee to your list of delegates.
7. The selected Travel Assistant is now listed in your Profile. The green check icon (✓) indicates that he/she can now book travel on your behalf.

To add a Vanderbilt employee to your Expense Delegates in Concur:

1. Login to Concur at vanderbilt.edu/ebiz/ and select the Profile tab to access your Concur profile.
2. Under the Expense Settings section, click Expense Delegates.
3. Click Add on the Delegates tab.
4. Type the name of the employee you would like to assign as a Delegate.
5. Click Add to add the employee to your list of delegates.
6. To assign a delegate to prepare expense reports on your behalf, check the boxes for Can Prepare, Can View Receipts and Receives Emails. While a delegate may prepare the expense report on your behalf, you must still log into Concur to submit the report for approval.
7. To assign a delegate to approve reports temporarily on your behalf, check the boxes for Can View Receipts, Can Approve Temporary, and Receives Approval Emails, then enter the beginning and ending approval dates.
8. Click Save to save these settings.
Step A – Create a new expense report

For more detailed instructions, the online module "Creating and Submitting a Non-Travel Expense Report" is available in The Learning Exchange.

1. Create new and access existing expense reports on the Expense tab.
2. Use the Create New Report button to start a new report.
3. Existing expense reports are listed on the Expense tab.

Step B – Fill out the Report Header

1. Fill out all required fields marked with a red bar. Report Name and Business Purpose Description are free text fields used to describe the expenses and purpose of the report. Expense Category and Business Purpose Category must be selected from a drop-down menu. Cost Center displays the default cost center in your Profile, and may be updated if necessary. The optional Comment field can be used for additional description.
2. Click the Next button once all required fields are completed.

Step C – Add expenses and submit for approval

1. Click the New Expense button to open the New Expense tab (2) on the right.
2. Click the appropriate Expense Type from the categorized list provided on the New Expense tab.
3. Based on Expense Type (2), fill out all required fields, allocate and itemize if necessary, attach receipts, and Save.
4. Once a New Expense is saved, it will be listed in the Expenses section with associated icons representing information saved in the expense (See Icon Definitions above for a description of each icon).
5. Total Amount will display a running total of all expenses added to the report including any items marked as “Personal – Do Not Reimburse.” Total Requested will display the amount requested for reimbursement.
6. Click the Submit Report button once all expenses are saved to forward the report to your Expense Report Approver.
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I have been in the travel industry for over 30 years including positions with the airlines, travel agencies, in house travel manager, private travel club and a travel school instructor. Besides being a booking agent my other experience includes Quality Assurance Specialist/Trainer, Quality Control Trainer/Supervisor, Help Desk Agent, Customer Service/Ticketing Agent/Agency Desk Supervisor. My time as an in house travel manager included

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I have been a Corporate Travel Agent for 25 years, and I truly love what I do. I have lived in Colorado most of my life, but have a desire to move somewhere closer to the ocean. I am a single mother of two children, and the

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I have been in the travel industry as a travel consultant for 30 years. I have seen a lot of changes throughout the years. I moved with my son three years ago from Colorado to Lake Havasu Arizona. We love it! No more shoveling or mowing the lawn- just have to keep up with the weeds!

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A thirty-five year veteran of the travel industry, Carol has worked for one of the largest airlines in the country to the Travel Manager for the Denver Post newspaper. For the Post and its parent companies, she has sent reporters and photographers all over the globe covering everything from breaking news events in the USA, to the wars in Iraq and Afghanistan, and almost