THE OHIO STATE UNIVERSITY

Completing Concur Profile

Travel Office: Concur Job Aid

! IMPORTANT REMINDERS:

- Concur is for university business use ONLY – no personal travel is permitted to be booked through Concur.
- An approved Spend Authorization (SA#) is required at purchase.
- Access to Concur is limited to employees only (no contingent or part time employee access).
- Your Concur access is based on the agency that supports your travel demographic in Workday:
  - If you are UNIV, OSUP, Health System = Concur with Corporate Travel Planners (**Individual business travel**)
  - If you are ATHLETICS = Concur with Anthony Travel (Athletics business travel)

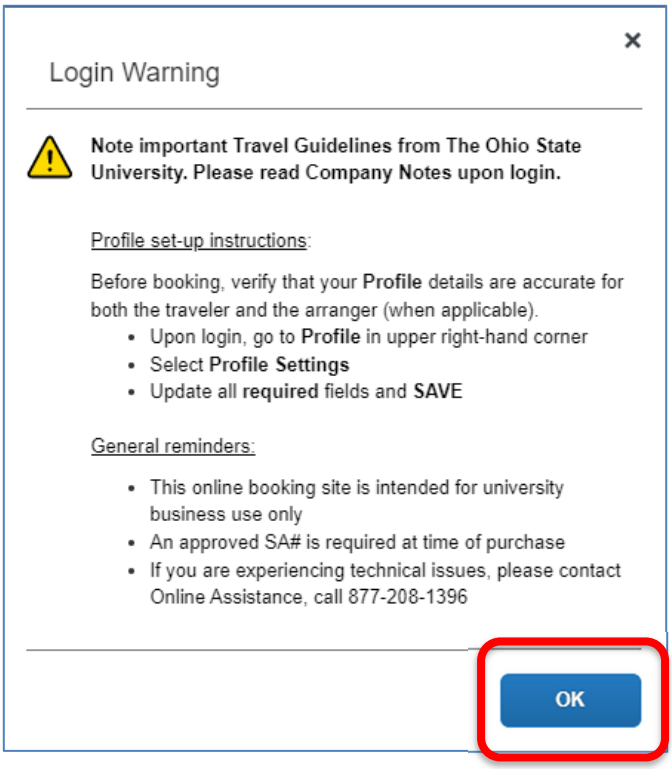
If you have any questions, or need further assistance please contact the Travel Office at 614-292-9290 or travel@osu.edu.

Completing Concur Profile

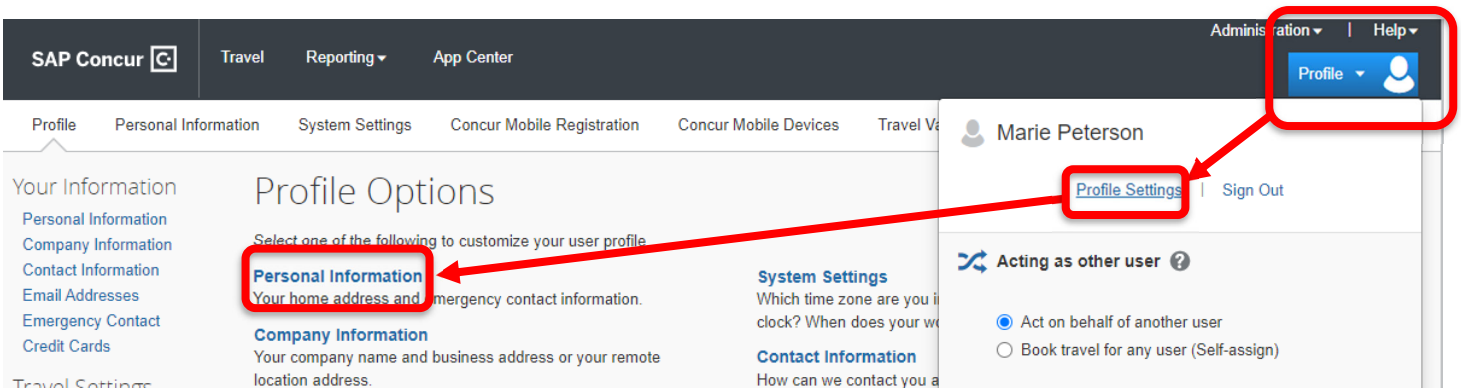
Travelers and Travel Assistants (aka Arrangers) must complete their own individual profiles before using Concur.

- **Travel Assistant:** You will not be able to commence with booking arrangements until YOUR profile is complete. Further, your traveler cannot assign you as their Travel Assistant until YOUR profile is complete.
- **Traveler:** You will not be able to commence with booking arrangements until YOUR profile is complete. YOUR profile must store some secure information (e.g., birthdate for TSA) and due to security reasons, only you should complete YOUR profile. Once you have completed and saved your updated profile (including assigning a Travel Assistant when applicable), your secure information will be encrypted.

1. Navigate to Concur located at the Travel website.
2. Click "**Book Travel Online**" icon
3. Login with OSU credentials (e.g., *name.#* and password) and respond to duo pass.
    - Based on your login credentials, you will automatically be directed to the appropriate OSU instance of Concur based on your primary assignment (University or Athletics).
4. Click **OK** at the Login Warning.



5. Access your profile information by following the path below:
    - Select **Profile** > **Profile Settings** > **Personal Information**



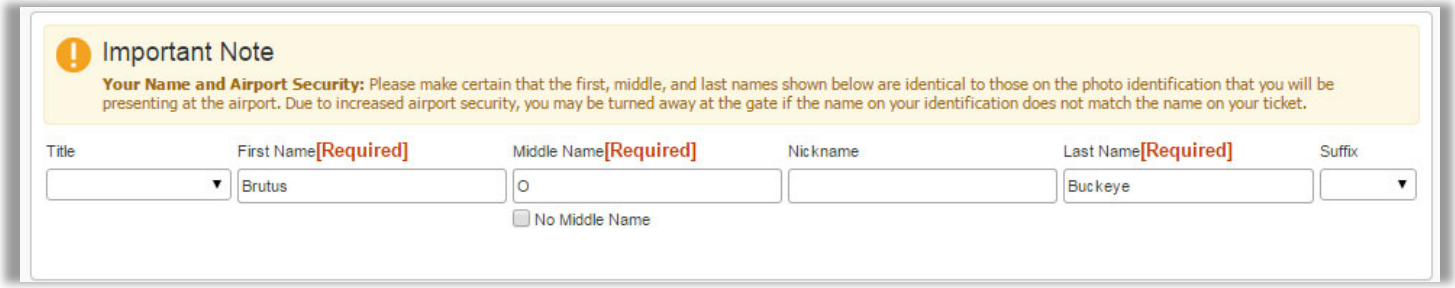
6. Review and complete each section of your profile, specifically for content flagged as **[Required]**, then select "**save**" at the bottom of the page.

Important Note:

- Information entered is exclusive to the individual whose name is referenced in the profile and should **NOT** be altered to another individual's information.
- Some information is auto filled from the OSU HR feed each week. If changes are made to the name that defaults (e.g., adding a middle initial to match REAL ID), it will be overwritten with the OSU HR feed to display what is set up at your University HR profile in Workday. Permanent changes to the name must be made with University HR.
- Special characters (e.g., O'Buckeye), will not import with the OSU HR feed, as they are not accepted by TSA and the Global Distribution System (GDS). Permanent changes to the name must be made with University HR.

Name:

Information will automatically populate as entered at OSU HR. Verify that this information appears as it does on the REAL ID with which you will be traveling and update as necessary. If changes are made to the name that defaults (e.g., adding a middle initial to match REAL ID), it will be overwritten with the weekly OSU HR feed to display what is set up at your University HR profile in Workday. Permanent changes to the name must be made with University HR to affect a permanent change in Concur.

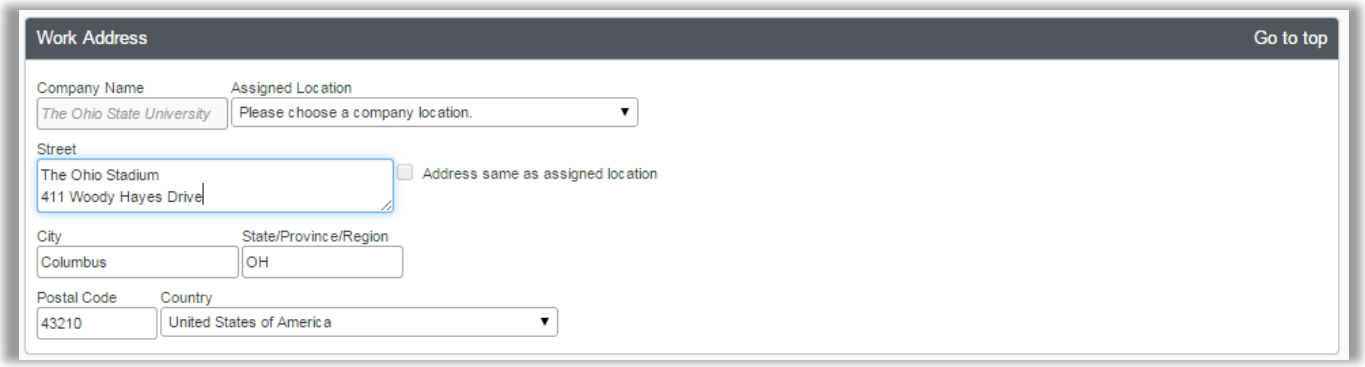


Company Information:

Verify that your employee ID is correct. If errors are found email the Travel Office (travel@osu.edu) before booking your trip.

Work Address:

Enter your work address.

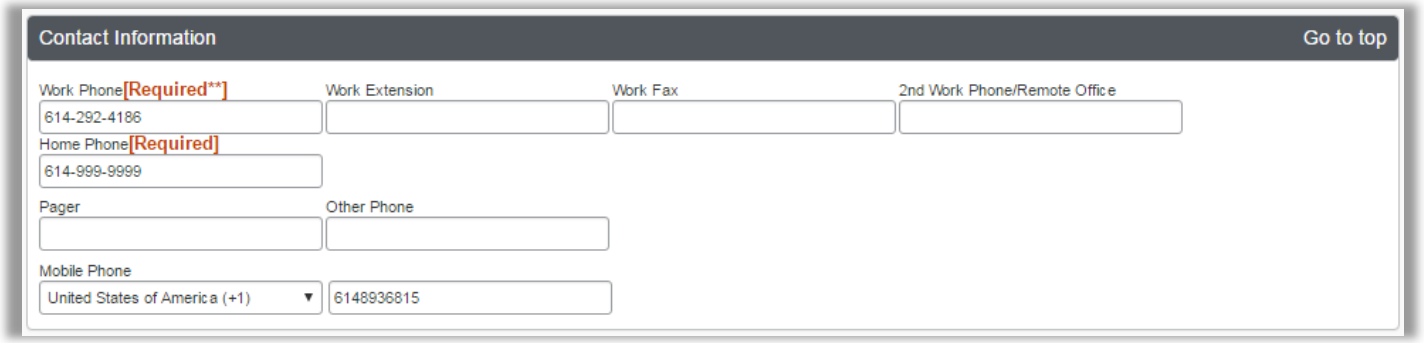


Home Address:

Enter your home address.

Contact Information:

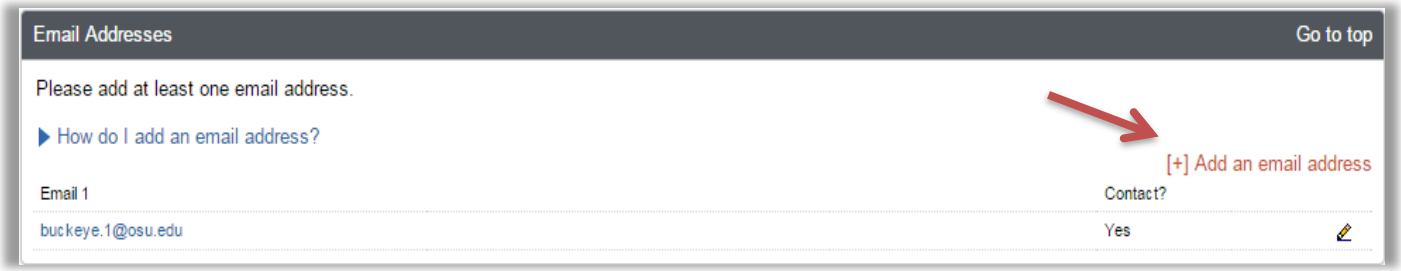
Enter your contact information. **Important:** The "Work Phone" field is the phone number that the airline will contact in the event of a flight change/delay/cancellation. It is highly recommended that the number listed in this box be your primary phone number where you can be reached 24/7 (e.g., mobile phone).



Email Addresses:

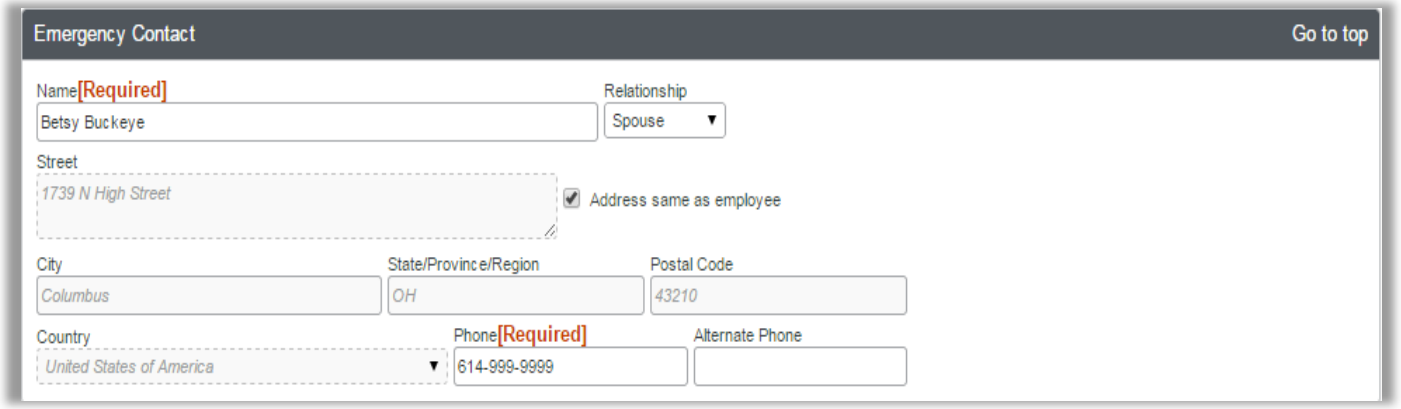
This section is where you can list the email addresses to receive Concur notifications.

If you have multiple Travel Assistants (Arrangers) who should receive all of your notifications, ensure that their email addresses are listed in this section. Select "[+] Add an email address" for each additional email address.



Emergency Contact:

Enter your Emergency Contact information.



Travel Preferences:

This section allows you to set default travel preferences for Air Travel, Hotels, Car Rentals, and add travel reward programs to your profile. See the Travel Policy and the Travel FAQs for important stipulations regarding the use of travel reward programs.

Important: In the Frequent Traveler Programs section, make sure you enter all your reward numbers correctly as this may impact the booking process. Ensure your name on the profile and your rewards program match exactly. If you receive an error with a link to your profile, there is an incorrect reward program number that is blocking the process. You can delete and re-enter the reward number by removing any special characters to fix the error.

Unused Tickets

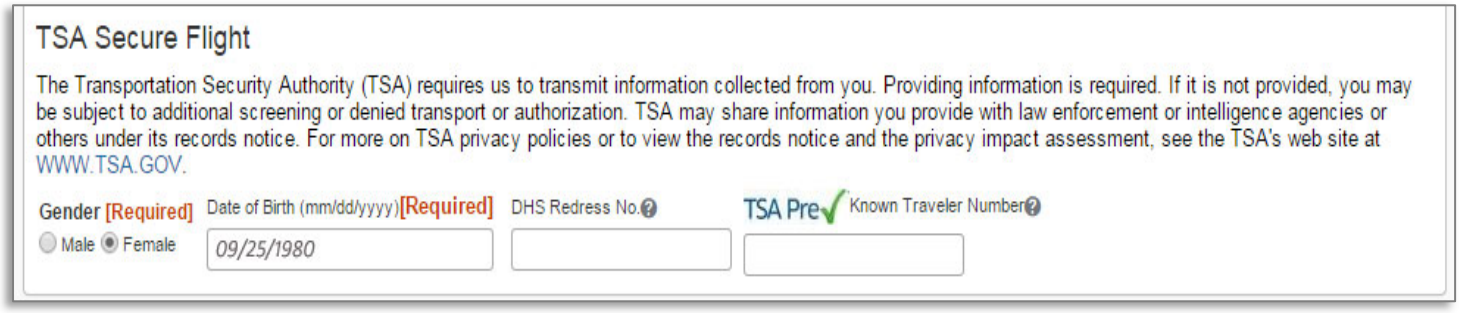
This section contains any unused ticket credits from airlines. It will provide the monetary value of the credit and the expiration date.

Southwest Ticket Credits

This section contains any unused ticket credits from Southwest airlines. It will provide the monetary value of the credit.

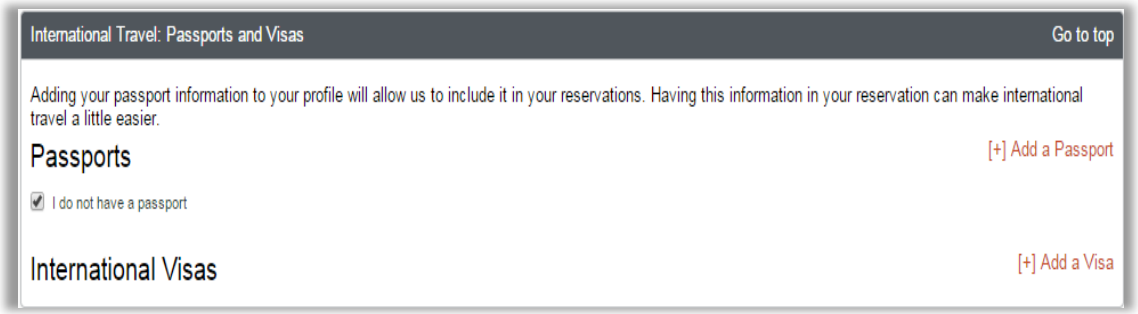
TSA Secure Flight

This section contains information required by the TSA to purchase your airfare such as Date of Birth and Gender. If you have a DHS Redress Number or TSA Pre-Check number, you may provide it here. Clicking on the question mark icon next to the field title will provide more information.



International Travel: Passports and Visas:

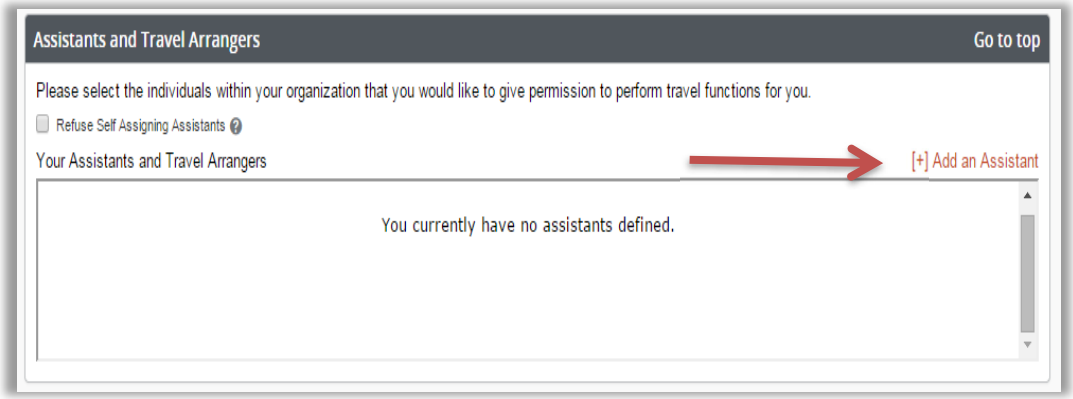
If applicable, Passport and Visa information may be added to this section.

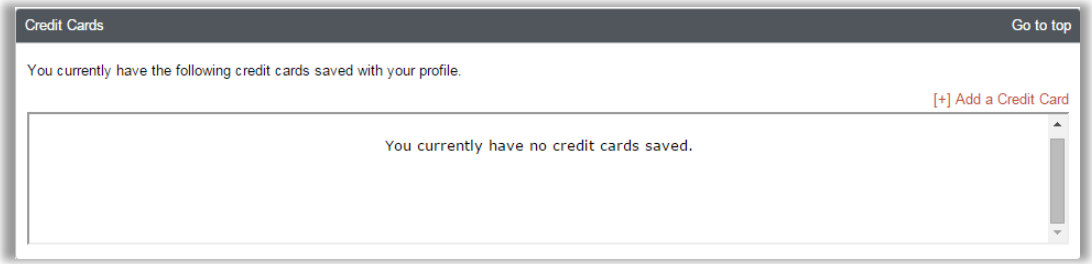


Assistants and Travel Arrangers:

This section is where you can assign a Travel Assistant (Arranger). Select "**[+] Add an Assistant**" for each assistant you wish to assign.

For instructions on assigning a travel assistant, see the resource guide titled: *Assigning a Travel Assistant in Concur* located in the Company Notes section under Reference Guides or at the Travel website under Training and Job Aids – Concur Booking Tool.



Credit Cards:

If you wish to use the booking tool to hold hotel reservations or car rentals, you will need to enter a credit card into your profile. Select "**[+] Add a Credit Card**" to enter card information.