

# Concur Travel Expense & Purchasing Card Quick Set Up Guide **BEFORE** you get started...

Go to: [www.mtu.edu/fso/travel-pcard](http://www.mtu.edu/fso/travel-pcard)

Log in using your Michigan Tech SSO

Click on **Profile – Profile Settings**

## Your Information

1. Go to [Contact Information](#)
  - a. Enter your Work Phone and Home Phone
2. Go to [Email Addresses](#)  
Click on all blue links to open email information. **Verify your email.**

## Expense Settings

3. Go to [Expense Information](#)
  - a. Add/Verify your **Traveler Type**, **Default Index**, and **Department**

4. Go to [Expense Delegates](#)

Delegates are employees who are allowed to perform work on behalf of other employees. IF you have a Delegate, click **Add** and follow the set up.

## Expense Delegates

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 Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Laajala, Susan slaajala@mtu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>				

- **Can Prepare:** Delegate can prepare your expense reports (Delegates **can not Submit** your reports)
- **Can Submit Requests:** Delegate can submit requests for international travel and/or cash advance
- **Can View Receipts:** Delegate can view and attach your available receipts to an expense report
- **Receives Emails:** Delegate will receive the same emails you have selected in the Expense Preferences
- **Can Approve:** Delegate can Approve expense reports on your behalf

5. Go to [Concur Mobile Registration](#)

Manage your expenses on your mobile device as well as approve reports and upload receipts.

- Download the mobile app by clicking Get Started. Concur will email a link to download the app.
- Click on **create a Concur Mobile PIN** which is needed to log into the app