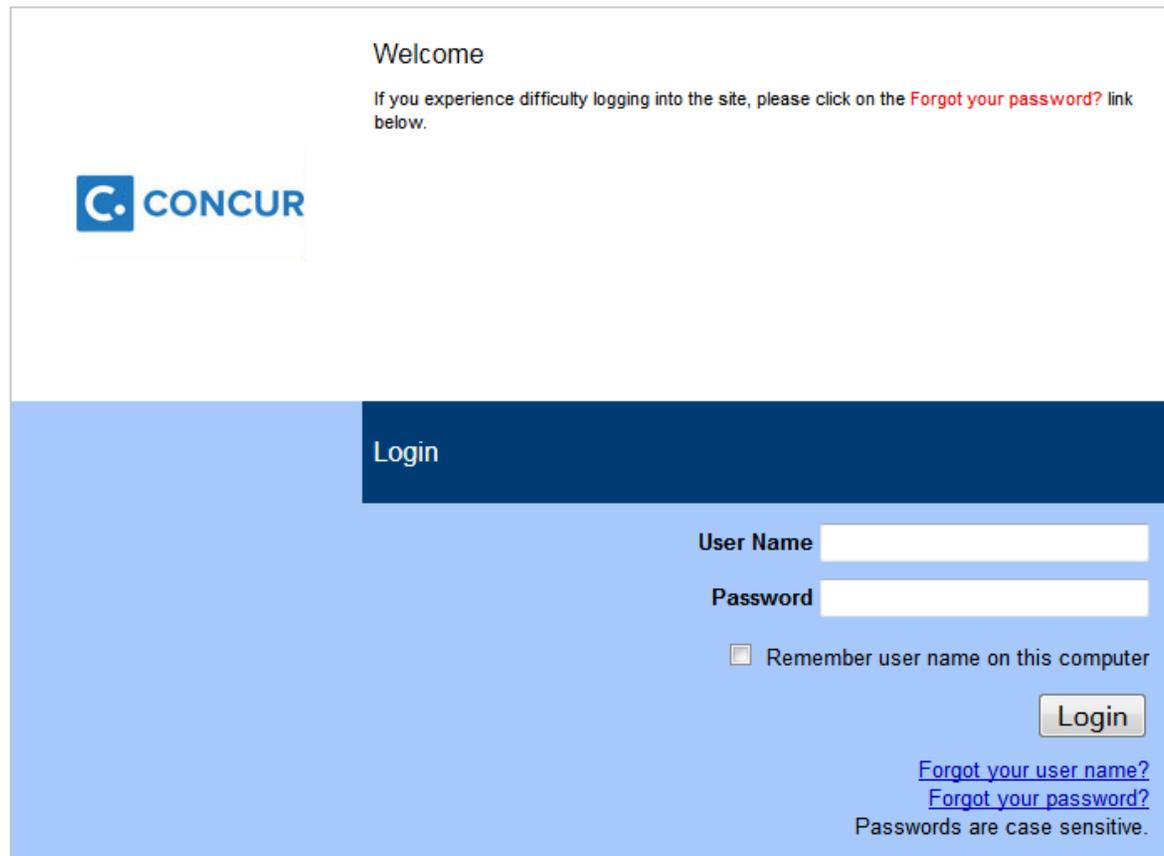


PFMC Concur Helpful Tips – Initial log-in and Profile set-up

Log into Concur: <https://www.concursolutions.com/>



The screenshot shows the Concur login page. At the top, it says "Welcome" and provides a link for "Forgot your password?". Below this is the Concur logo. A dark blue bar with the word "Login" is positioned above the input fields. There are two input fields for "User Name" and "Password". A checkbox labeled "Remember user name on this computer" is present. A "Login" button is located below the input fields. At the bottom right, there are links for "Forgot your user name?" and "Forgot your password?", along with the note "Passwords are case sensitive."

Welcome

If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below.



Login

User Name

Password

Remember user name on this computer

Login

[Forgot your user name?](#)
[Forgot your password?](#)
Passwords are case sensitive.

Your username will be emailed to you separately.

Initial password is: welcome. You will need to change your password immediately.

After logging in, the initial screen presented is:

The screenshot shows the Concur user interface. At the top, there is a navigation bar with the Concur logo, tabs for 'Travel', 'Expense', and 'App Center', and a 'Take a Tour' dropdown. On the right, there are links for 'Support' and 'Help', and a 'Profile' dropdown menu with a user icon. Below the navigation bar, a header area displays 'Hello, Test' and several action buttons: '+ Start a Report', '+ Enter Reservation', '+ Upload Receipts', '00 View Trips', '00 Available Expenses', and '00 Open Reports'. The main content area is divided into several sections: 'TRIP SEARCH' with an 'Air/Rail Search' form, 'ALERTS' with two notification boxes, a large 'ExpenseIt' advertisement, 'COMPANY NOTES' with a welcome message and links to 'Self Service' and 'User Support Desk', 'MY TRIPS (0)' with a message 'You currently have no upcoming trips.', and 'MY TASKS' with two task cards: '00 Available Expenses' and '00 Open Reports'.

Click here to access your profile information.

A drop-down box will allow you to:

- Change Profile settings
- Log out

Personal information:
Verify your name for travel (must match your photo identification used for travel)

The screenshot shows the Concur user interface. At the top, a status bar indicates the user is logged in as a test user. The navigation bar includes the Concur logo, 'Travel', 'Expense', and 'App Center' tabs, along with 'Support' and 'Help' links. A 'Profile' dropdown menu is visible. Below the navigation, a breadcrumb trail shows 'Profile' > 'Personal Information' > 'Change Password' > 'System Settings' > 'Mobile Registration' > 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and includes a sub-header: 'Select one of the following to customize your user profile.' The page is organized into several sections: '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), 'Expense Settings' (Expense Information, Bank Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Connected Apps, Concur Connect, Change Password, Privacy Statement, Travel Vacation Reassignment, Mobile Registration). The 'Personal Information' section is expanded, showing options for Personal Information, Company Information, Credit Card Information, E-Receipt Activation, Travel Vacation Reassignment, Expense Delegates, and Change Password. The 'Setup Travel Assistants' option is highlighted with a callout line. The 'Bank Information' option is also highlighted with a callout line. The footer contains the Direct Travel logo, 'Company Policy', and 'Support Contact Support'.

Set up your assistant to make travel arrangements on your behalf. Contact Council staff to have your assistant's profile set up.

Bank information is needed to send your claim via ACH. Checks cannot be sent to travelers.

Profile update – Part 1 (Personal information):

Parts that need to be completed before you use Concur to book flight arrangements:

Verify your name matches your identification and TSA information (gender and date of birth)

****Important note**** Make sure you click one of the save buttons before leaving the page.

Name and basic information

This must match your photo identification. Contact Council staff to have information in gray boxes changed.

My Profile - Personal Information

Jump To: Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

[Change Picture](#) 

! Important Note
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name [Required]	Nickname	Last Name	Suffix
<input type="text" value=""/>	<input type="text" value="Test"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Traveler"/>	<input type="text" value=""/>
		<input type="checkbox"/> No Middle Name			

Company Information Go to top

Please contact your Concur Administrator if your profile name does not match that on your government issued ID that you use for travel.

Employee ID

Manager Org. Unit/Division Employee Position/Title

Work Address Go to top

Company Name	Assigned Location
<input type="text" value="Pacific Fishery Manage"/>	<input type="text" value="Please choose a company location."/> ▼
Street	
<input type="text"/>	
<input type="checkbox"/> Address same as assigned location	
City	State/Province/Region
<input type="text"/>	<input type="text"/>
Postal Code	Country
<input type="text"/>	<input type="text" value="United States of America"/> ▼

Save

Home Address Go to top

Street	
<input type="text"/>	
City	State/Province/Region
<input type="text"/>	<input type="text"/>
Postal Code	Country
<input type="text"/>	<input type="text" value="United States of America"/> ▼

Save

Contact Information Go to top

Work Phone [Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone [Required**]			
<input type="text"/>			
Pager	Other Phone		
<input type="text"/>	<input type="text"/>		
Mobile Phone	<input type="text"/>		
<input type="text"/>	<input type="text"/>		

Send Test Message ?

****You must specify either a home phone or a work phone.**

Save

Your email will be entered, but needs to be verified to have information sent to Concur via email and be linked to your profile (receipts, itineraries booked outside of Concur, etc.)

Email Addresses Go to top

Please add at least one email address.

- [How do I add an email address?](#)
- [Travel Arrangers / Delegates](#)
- [Why should I verify my email address?](#)
- [How do I verify my email address?](#)

[\[+\] Add an email address](#)

Email 1	Verification Status	Contact?
test_traveler@pcouncil.org	<input checked="" type="checkbox"/> Not Verified Verify	Yes ✎

Emergency Contact Go to top

Name Relationship

Street Address same as employee

City State/Province/Region Postal Code

Country Phone Alternate Phone

[Save](#)

How to verify your email address:

1. Once you have saved an email address, click the "Verify" link.
2. Check your email for a verification message from Concur.
3. Copy the code from the email message into the "Enter Code" box next to the Email address below.
4. Click "OK" to submit the code and complete verification.

Update your preferences as desired. Hotel arrangements will not be made through Concur for Council Meetings (specified by the invitation).

You can add your frequent traveler, mileage plans, etc. programs to your profile to link those plans to purchases made through Concur.

Travel Preferences Go to top

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

Air Travel Preferences ?

Seat: | Seat Section: | Special Meals: | Ticket Delivery:

Preferred Departure Airport: | Other Air Travel Preferences: | Medical Alerts:

Hotel Preferences

Room Type: | Smoking Preference: | Message to Hotel Vendor:

I prefer hotel that has:

a gym a pool a restaurant room service Early Check-in

Accessibility Needs

Wheelchair access Blind accessible

Car Rental Preferences

Car Type: | Smoking Preference: | Car Transmission: | In-car GPS system Ski rack

Message to Car Rental Vendor:

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs [+] Add a Program

No programs defined

Ticket credits for purchases made on Council funds can be added and used later.

TSA Information is required for flights.

You can add your passport if desired.

Set up your travel assistants & arrangers.

Unused Tickets

Southwest Ticket Credits

[+ Add ticket credit](#)

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender [Required] Male Female **Date of Birth (mm/dd/yyyy) [Required]** **DHS Redress No.** **TSA Pre✓ Known Traveler Number**

[Save](#)

International Travel: Passports and Visas [Go to top](#)

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports [\[+\] Add a Passport](#)

I do not have a passport

International Visas [\[+\] Add a Visa](#)

[Save](#)

Assistants and Travel Arrangers [Go to top](#)

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants [?](#)

Your Assistants and Travel Arrangers [\[+\] Add an Assistant](#)

You currently have no assistants defined.

[Save](#)

Profile update – Part 2 (Bank Information):

Parts that need to be completed before you use Concur to submit expense claims:
Verify your bank information (this must be confirmed by Concur prior to submission).

****Important note** Make sure you click save before leaving the page.**

Enter your bank information. Concur will verify your account information (this may take several days), and status will change to confirmed after verification is complete.

Bank Information

UNITED STATES

Routing Number Bank Account Number Re-Type Bank Account Number

Bank Name Branch Location Account Type

Status Active

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.

John Q. Public _____, 20__ 1001
1358 Main St.
Sometown, OH 98765

Pay to the order of _____
_____ Dollars

Bank of Sometown

234123987 001234567891 1001

Bank Routing Number Bank Account Number Check Number (Do not use)

Routing Number is usually located between the ⑆ symbols on your check and is 9 digits.
Account Number is usually located before the ⑆ symbol on your check and is 3-17 digits.

Account History

Routing Number	Bank Account Nu...	Account Type	Activity	Description	Last Changed	Changed By
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Questions or need to make changes?

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