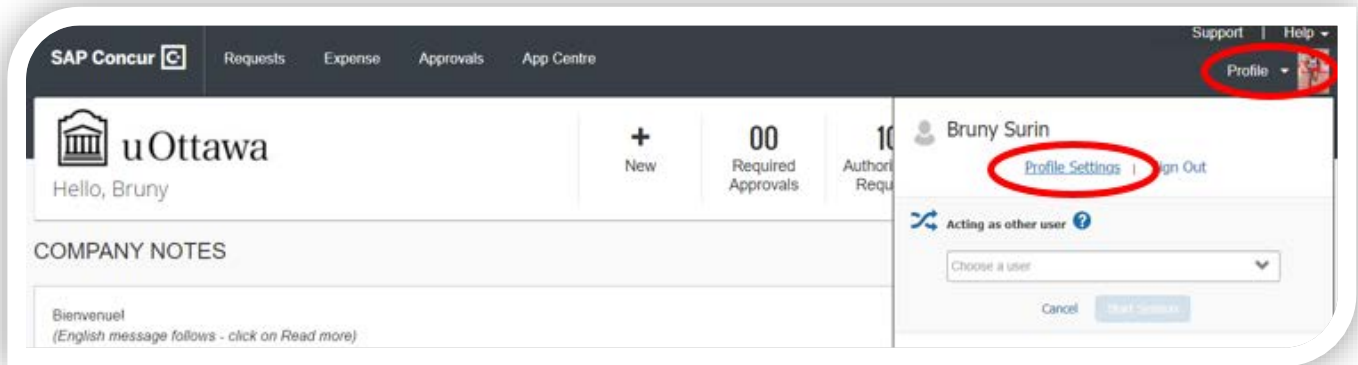


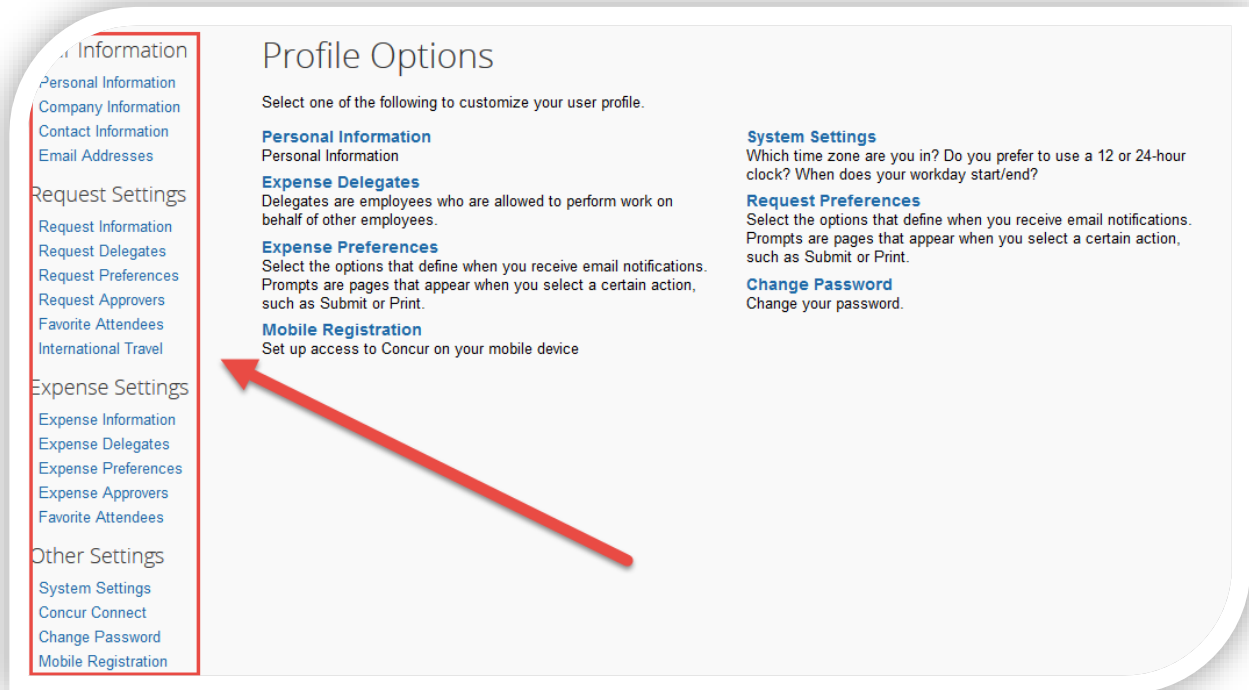
# CUSTOMIZING YOUR PROFILE SETTINGS

## Concur expense management system

Concur allows users to change, confirm and update their profile settings. To do so, under **Profile**, select **Profile Settings**.



Confirm the information under each element on the left of the Profile Options. The following highlights the elements important to update.



## UPDATING YOUR PERSONAL INFORMATION

Select **Personal Information** and ensure that all the information (in grey) is accurate and up to date. Since you cannot edit this information, email [reimbursement@uOttawa.ca](mailto:reimbursement@uOttawa.ca) to request any corrections.

**Note:** You are not required to provide personal information such as your home number or passport information. We have entered the University phone number in the **Home Phone** box since this box is mandatory.

## VERIFYING YOUR EMAIL ADDRESS

Verify at least one email address. To do so, under **Personal Information**, go to **Email Addresses**. Make sure that it is your email address and select **Verify**. A verification code will be emailed to you that you must then enter in the appropriate box.

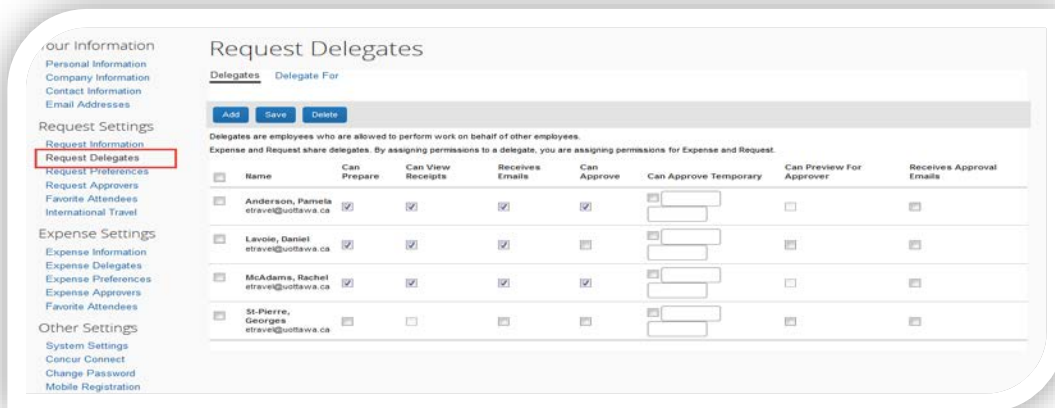
If you verify more than one email address, you can specify the one through which you wish to receive email notifications.

## ADDING THE BANNER ID AND DEFAULT FOAP

Select **Expense Information**. This gives you the option to choose your default FOAP as well as your Banner ID. You must select your Faculty or Service Compliance Officer's Banner ID (or the Central Compliance Officer's Banner ID if your faculty or service became part of the central compliance service under Policy 21). This information is required for your request or your expense claim to be automatically entered in the Financial System to issue a payment.

## ADDING A DELEGATE

Under **Expense Delegates** or **Request Delegates**, you can assign a person to act as your delegate. This person can act on your behalf to prepare your requests and claims. He or she can only perform specific tasks that you have authorized.



### Notes:

- Delegates cannot submit documents; they can only prepare them. They must tell you when to log into the system to submit the prepared documents.
- You can have as many delegates as you like and specify different tasks for each.

The **Delegate For** tab lets you see whom you are a delegate for and the permissions you have been given.

Under the **Delegate For** tab, you can see who has delegated tasks to you and which tasks.

To add a delegate:

1. Under the Delegates tab, select **Add**.
2. Use the search box to find the person you wish to assign as your delegate.
3. When his or her name appears, select it. It will now appear in the box.
4. Select the boxes that describe the permissions you are giving to the delegate. These are the tasks the delegate can perform on your behalf.
5. Select **Save**.

## EMAIL NOTIFICATION PREFERENCES

Under **Request Preferences**, you can choose when to receive email notifications.

Under **Prompt...**, you can select “For an approver when a request is submitted” so that you are prompted to choose the appropriate approver when submitting a request.

Under **Expense Preferences**, you can select when to receive email notifications.

Under **Prompt...**, you can select “For an approver when an expense report is submitted” so you are prompted to choose the appropriate approver when submitting an expense report.

