

Getting Started

- Login to my.pitt.edu
- Click the link for PantherExpress Travel and Expense Management

Review and Complete your Profile.

- From the Concur homepage, click **Profile**, then **Profile Settings**.
- Complete the following Information

Your Information

Personal Information

Name - **Required**

- First and Last Name will be populated from your University HR record.
- Add Middle Name and, if applicable, Suffix to **match your government issued photo ID which you will present to airport security.**

NOTE: If Name information is incorrect, contact the Payroll Department.

Address – Optional

Contact Information - **Required**

- Enter a work and home phone number

Add your mobile device – **Highly Recommended**

Registering your mobile devices will allow you to receive text messages from Concur informing you of any cancelled or delayed airline flights in addition to informing you of potential risks in your travel area. .

- In the section under “Mobile Devices”, click “Add a new device”.
- Enter a name for your device and select the device type.
- Ensure the correct country code is selected from the dropdown.
- Enter your mobile number.
- Check off “Primary Mobile Phone” and “Use for Safety and Business Text Message Alerts”.
- Click **OK**

Verify your email address – **Important!**

NOTE: Your “@pitt.edu” email address has already populated your profile. Verifying your email address allows you to:

- Email your receipts to receipts@concur.com
- Forward travel plans to plans@concur.com

- Click the “**Verify**” link. A code will be sent from Concur to your @pitt email address. Copy the code from the email message.
- Return to your profile. Paste the code you received into the **Enter Code** box, then click **OK**.

Emergency Contact

- Enter the contact information for your emergency contact.
- If your emergency contact’s address is different from your own, **uncheck** “Address same as employee”.

Travel Preferences – **optional, but recommended for frequent travelers**

- Enter air, hotel, and car rental preferences
- If you participate in Frequent Traveler Programs, click **Add a Program**

TSA Secure Flight

- Gender and Date of Birth will auto populate
- If you have a TSA Pre-check number, it can be entered

International Travel: **Passports and Visas – Recommended for International Travelers**

- Entering passport and visa information in Profile, allows it to be available when booking travel
- Enter passport/visa information and click **Save**

Credit Cards

- Your Pitt-paid Travel Card info. will be auto-loaded into your Profile. The display name for the Pitt Travel Card is “Corporate Card”.
- The Pitt Travel Card is recommended for travel; however, if desired, a personal credit card can be entered into the Profile and will be available for purchasing airfare, or reserving hotel rooms, and car rentals.

Request Settings

- Information, Delegates, Preferences, and Approvers are shared between **Request** and **Expense Settings**
- Start with **Request Settings** and the info. will carry through to **Expense Settings**. If changes are made to one section, the other section will automatically update.

Request Information

- A default departmental account number will automatically populate.
- If you want a Reference number to be part of the default number, it must be added here.

Request Delegates

Note: *Expense delegates can prepare, but cannot submit expense reports on behalf of the traveler. It is the responsibility of the traveler to add/delete delegates.*

- Click **Add**, then begin typing the individual's name and select their record from the dropdown list.
- Check off the functions you would like your expense delegate to perform on your behalf (typically this includes prepare, book travel, submit requests, view receipts, receive emails)
- Click **Save**.

Request Preferences – no setup necessary

Request Approver

- Your default approver will automatically display.

Favorite Attendees – optional

- Frequent attendees of Group Business Meals can be setup in the system ahead of time
- Click New Attendee, enter required info., click **Save**

Other Settings

E-Receipt Activation – **Highly Recommended**

Enables the auto collection of electronic receipts into the Concur application, from participating suppliers.

- Click **E-Receipt Activation** link

- Accept E-Receipt Activation and Use Agreement
- You will receive a confirmation that E-Receipts has been activated

System Settings - Skip

Connected Apps – **Highly Recommended**

Tripit Pro

- Locate **Tripit Pro** eligibility message on Concur home page, under Alerts
- Click **Get It** link
- Enter your @pitt.edu email address, and a password, and click **sign up**.
- **Tripit** will send a verification email to your @pitt.edu email address. Click the link in the email to verify the account.

Mobile Registration

- Setup the traveler's mobile phone to capture receipts, submit expense reports, etc
- Create a PIN, and click **Set PIN**
- Download the Concur application to the traveler's phone, using the provided link, or by going to the App Store on the traveler's phone
 - Login to Concur via the phone, using the traveler's @pitt.edu email and PIN as the password
 - Click **OK**, to allow Concur to send Notifications

Expenselt

- Open Concur on the mobile device
- Click the Menu icon (upper left corner)
- Click **Expenselt**. Click **Get**, then click **Install**
- An icon will be added to the mobile device for **Expenselt**

Your Concur Profile Setup is Complete!

Questions

Contact **PantherExpress Customer Service**:

- Phone - 412-624-3578;
- Email – pantherexpresscs@cfo.pitt.edu;
- Web Inquiry – <http://cfo.pitt.edu/pexpress/CustomerService/inquiry.php>