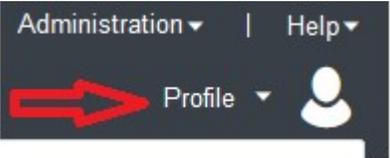
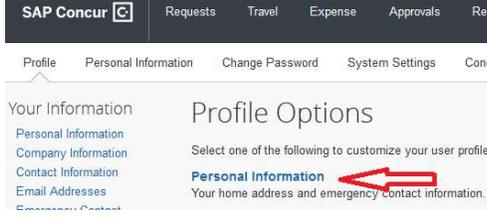


Concur Tips and Tricks

Setting up your profile

All travelers need to setup their Concur profile before they can book a trip. The Concur profile has information that is required to book airfare.

| Step 1 – Log into Concur | Step 2 – Open your Profile |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>From your myUMB portal page click the Concur Travel & Expense icon.</p>  | <p>Select the Profile icon in the top right hand corner of Concur.</p>  |
| <p>Select the Profile Settings link.</p>  | <p>Select the Personal Information link.</p>  |
| <p>Step 5 – Fill out the Required Fields</p> <p>Fields marked [Required] and [Required**] (validated and required) must be completed to save your profile.</p> <p>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 airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the</p> <p>Title: [dropdown] First Name [Required]: Luke Middle Name [Required]: M. Preferred Name: [text box]</p> <p><input type="checkbox"/> No Middle Name</p> <p>Required fields are marked by the orange [Required] next to them. Navigate through each section on the profile to find the required fields that are missing information.</p> | <p>Step 6- Verify E-mail address</p> <p>Select Verify and follow instructions. This allows you to forward receipts from this email address to receipts@concur.com so they are available on your Available Receipts dashboard for your expense report.</p>  |
| <p>Step 7- Add Default Vehicle for Mileage Reimbursements</p> <p>Select Vehicle Configuration from menu:</p>  <p>Select NEW button to create a “Default Vehicle”</p>  | <p style="text-align: center;">Note</p> <p>While not required, there are several areas for optional information such as, travel preferences, frequent flyer/traveler programs, TSA PreCheck information, passport information, or credit card information to your profile. Storing information on your profile eliminates entering it for each trip.</p> |