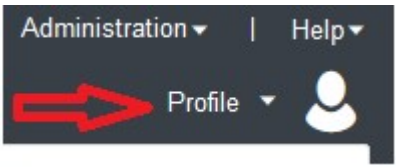
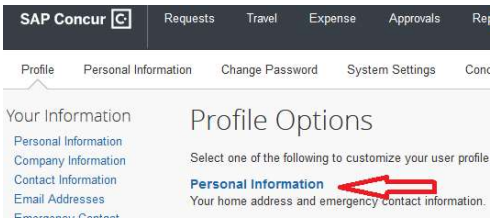
Concur Tips and Tricks

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.

<table>
<tr><th>Step 1 – Log into Concur</th><th>Step 2 – Open your Profile</th></tr>
<tr><td>From your myUMB portal page click the Concur Travel & Expense icon.

</td><td>Select the Profile icon in the top right hand corner of Concur.
 
</td></tr>
<tr><th>Step 3 – Select Profile Settings</th><th>Step 4 – Select Personal Information</th></tr>
<tr><td>Select the Profile Settings link.

</td><td>Select the Personal Information link.
 
</td></tr>
<tr><th>Step 5 – Fill out the Required Fields</th><th>Step 6- Verify E-mail address</th></tr>
<tr><td>

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.</td><td>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.

</td></tr>
<tr><th>Step 7- Add Default Vehicle for Mileage Reimbursements</th><th>Note</th></tr>
<tr><td>Select Vehicle Configuration from menu:

Select NEW button to create a “Default Vehicle”

</td><td>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.</td></tr>
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