

Set Up Your Travel and Expense System (Concur) Profile

When you log in to the travel and expense system (Concur) for the first time, you must complete and update your profile.

1. Go to Your Profile

- Log in to Concur.
- At the top of the home page, click *Profile*, then click *Profile Settings* (Figure 1).
- Click *Personal Information* to edit your profile.

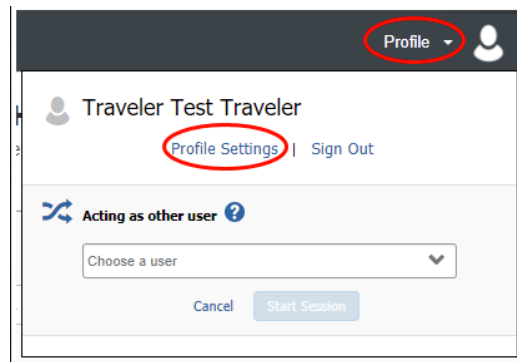


Figure 1

2. Complete and Update Your Profile

- Review your personal information for accuracy and make corrections as needed. Some sections are required while others are optional.
- Complete the following information in your profile and click *Save* after each section.

Name – *Pre-Populated*

- Your *First* and *Last Name* are pre-populated from your UB Human Resources (HR) record.
- It is required to add your *Middle Name*, or check the box *No Middle Name*.
- If any part of your name is incorrect, email ubs-travel-expense-support@buffalo.edu.

Company Information – *Pre-Populated*

- Your company information is pre-populated from your UB HR record.
- If this information is incorrect, email ubs-travel-expense-support@buffalo.edu.

Work Address – *Optional*

- It is optional to enter your work address.

Home Address – *Required*

- Although the fields are not required, be sure to verify your home address and update as needed.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu

Contact Information – *Required*

- It is required to enter your *Work Phone* and *Home Phone* numbers.
- If you do not have a home phone, enter your cell phone number instead.

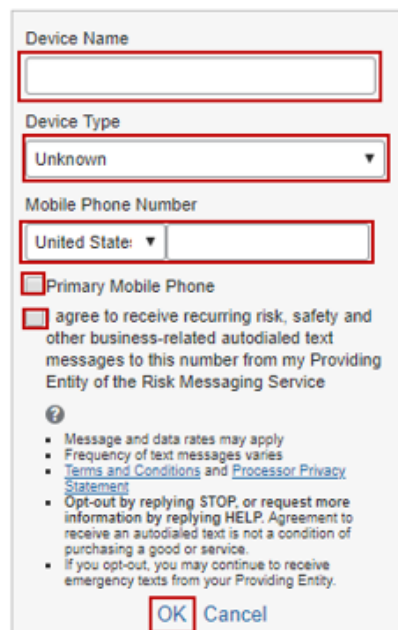
Register Mobile Devices – Recommended

It is recommended to register your mobile devices to receive text message alerts about flight delays, cancellations and potential risks in your travel area. To register a mobile device (Figure 2):

- Click *Add a new device*.
- Enter a *Device Name* and select the *Device Type*.
- Choose the correct country code from the dropdown and enter your mobile phone number.
- Click the checkboxes *Primary Mobile Phone* and *I agree*.
- Click *OK*, then click *Save*.



Add a new device »



Device Name

Device Type

Unknown

Mobile Phone Number

United State

Primary Mobile Phone

I agree to receive recurring risk, safety and other business-related autodialed text messages to this number from my Providing Entity of the Risk Messaging Service

Message and data rates may apply

Frequency of text messages varies

Terms and Conditions and Processor Privacy Statement

Opt-out by replying STOP, or request more information by replying HELP. Agreement to receive an autodialed text is not a condition of purchasing a good or service.

If you opt-out, you may continue to receive emergency texts from your Providing Entity.

OK Cancel

Figure 2

Email Addresses – *Required*

Your @buffalo.edu email address is pre-populated in your profile. Although it is not marked as required, you must verify your email address so you can:

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

Click *Verify* to verify your email address (Figure 3):

- A code will be sent to your email address. It may take several minutes to arrive in your inbox.
- When you receive the email, copy the code.

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- Return to your profile. Paste the code into the *Enter Code* box, then click *OK*.

Email Address	Verify	Contact?	Actions
Email 1 [redacted]@buffalo.edu	Not Verified <input checked="" type="checkbox"/>	Yes	<input type="button" value="Verify"/> <input type="button" value="Edit"/>

Figure 3

Emergency Contact — *Optional*

- It is optional to enter your emergency contact’s information.
- If their address is different from yours, uncheck the box *Address same as employee*.

Travel Preferences — *Recommended*

- If you are a frequent traveler, it is recommended to enter your air, hotel and car rental preferences.
 - However, entering travel preferences may limit your results when you search for travel reservations in *Trip Search*.
- If you participate in *Frequent-Traveler* or *Advantage Programs*, click *Add a Program*.

TSA Secure Flight — *Required*

- It is required to enter your *Gender* and *Date of Birth* even if you do not plan on traveling (Figure 4).
- Enter your TSA pre-check number if you have one.

Figure 4

International Travel: Passport and Visas — *Recommended*

- If you are a frequent traveler, it is recommended to enter your international travel information.

Assistants and Travel Arrangers — *Optional*

- This is optional. Click *Add an assistant* to add assistants and travel arrangers who will be given access to perform travel functions on your behalf.

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Credit Cards — *Optional*

- This is optional. Click *Add a Credit Card* to add a credit to your profile that you can use to purchase travel reservations.