

Travel and Expense Reimbursement

Setting Up Your Travel and Expense System Profile

When you log into the travel and expense system for the first time, you must complete and update your profile.

1. Go to Your Profile

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

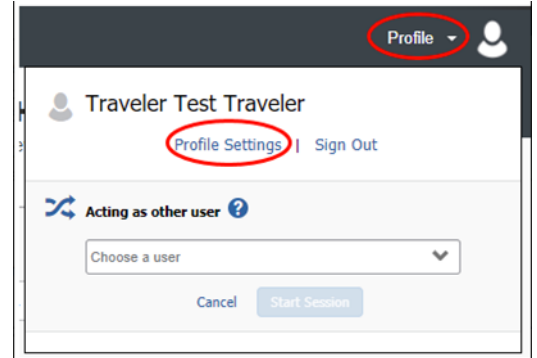


Figure 1

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 — **Required**

- Your **First and Last Name** are pre-populated from your UB Human Resources (HR) record.
- It is required you 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**

Home Address — **Required**

- Enter or verify your home address. Update as needed.

Contact Information — **Required**

- 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**

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:

- 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**.
- Check the boxes **Primary Mobile Phone** and **I agree**.
- Click **OK**, then click **Save**.

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2. Complete and Update Your Profile—Continued

Email Addresses — **Required**

Your @buffalo.edu email address is pre-populated in your profile. It is required to verify your email address to:

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

To verify your email address:

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

Emergency Contact — **Optional**

- Enter your emergency contact's information.
- If their address is different from yours, uncheck **Address same as employee**.

Travel Preferences — **Recommended for frequent travelers**

- Enter air, hotel and car rental preferences.
- If you participate in frequent-traveler or advantage programs, click **Add a Program**.

TSA Secure Flight — **Required**

- Enter your **Gender** and **Date of Birth**. This is required even if you do not plan on traveling.
- If you have a **TSA pre-check number**, enter it.

International Travel: Passport and Visas—**Recommended for frequent travelers**

Assistants and Travel Arrangers — **Optional**

- Click *Add an assistant* to add assistants and travel arrangers who will have access to perform travel functions on your behalf.

Credit Cards — **Optional**

- Click *Add a Credit Card* to your profile to purchase airfare, book hotel rooms and reserve car rentals.