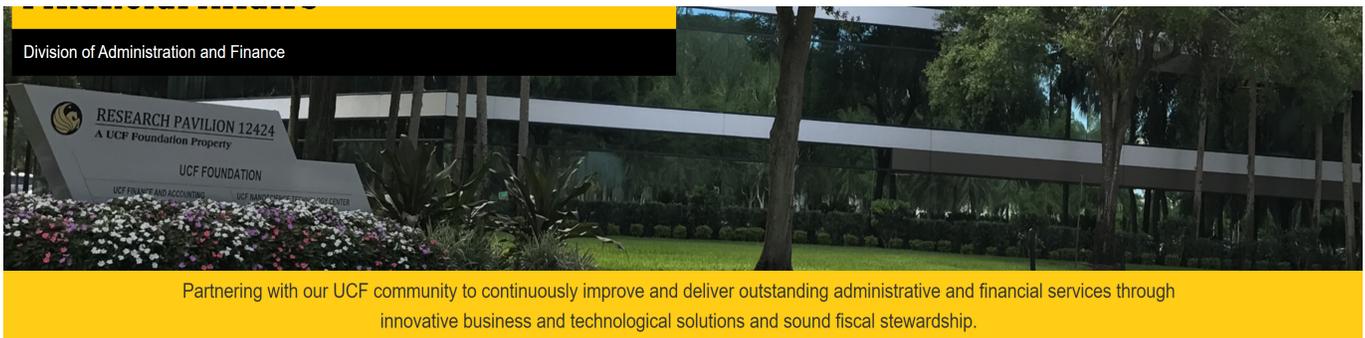


Instructions for Creating a Concur Profile

Please note that these instructions provide the minimum information needed in order to set up a profile in Concur. While inputting the required information is enough to allow you to make travel arrangements through the Concur website, you will likely find that it is beneficial to complete additional fields. For example, you may want to complete the Emergency Contact, Travel Preferences, TSA Pre Check and Passport fields in order to expedite the booking process. The more information you include in your profile, the easier booking will be.

1. Click the Book Travel link on the Financial Affairs website. <http://fa.ucf.edu/>



Response to COVID-19

For the safety of our community and to curtail the spread of COVID-19, our front desk open hours are currently from 10-5 Monday, Wednesday, and Thursday. The remainder of our staff is

Quick Links

F A Q

Financial Affairs' frequently asked questions by department.

Suppliers

* Doing business with UCF
* Vendor Payables

Procurement Card (PCard)

Providing an efficient means to streamline the procurement cycle for our employees.

Travel

* Book your UCF Travel via Concur Solutions
* Travel Payables

Procurement Services

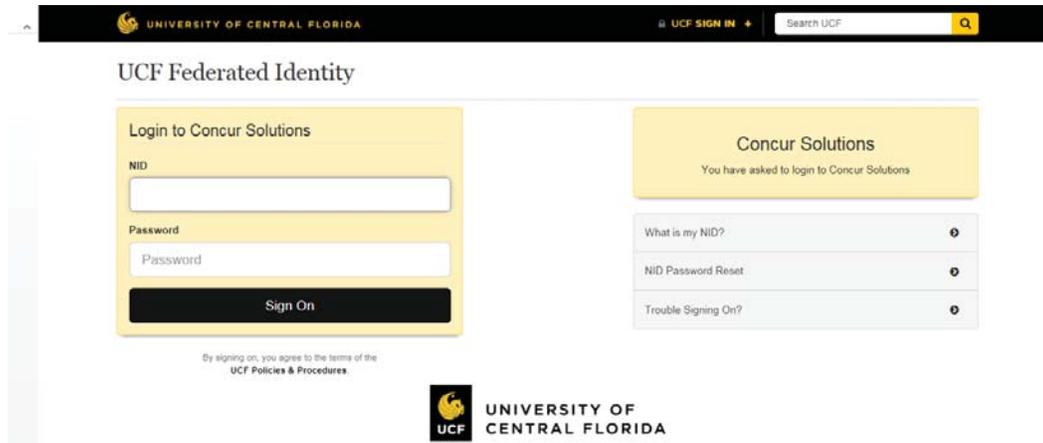
Supporting academic and administrative departments in the timely procurement of goods and services.

UCF Budget Model Redesign

Information about our collaborative initiative to develop a new transparent resource allocation model.

Instructions for Creating a Concur Profile

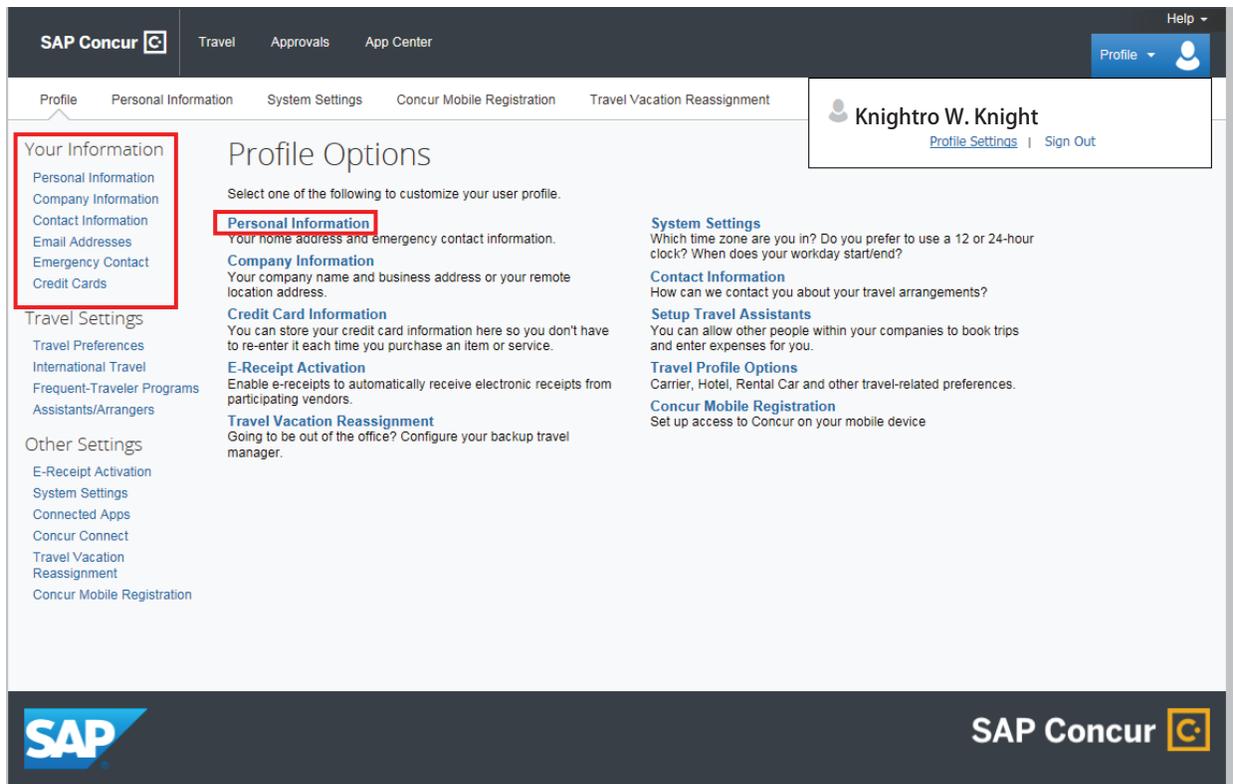
2. Log in to Concur using your UCF single sign-on username and password.



3. Click Profile Settings under the Profile drop down menu.

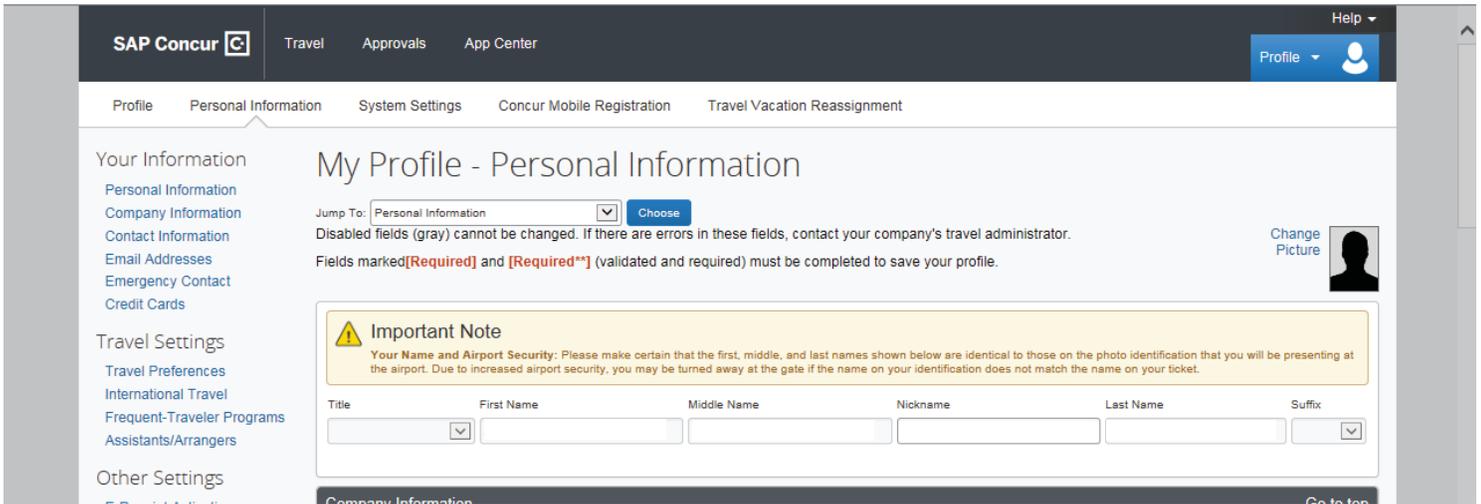
All of the information that will need to be input in order to create your profile and begin booking travel through Concur is located in the "Your Information" section.

4. Click Personal Information



Instructions for Creating a Concur Profile

- Verify that your first, middle and last names shown in the name section are identical to those on the photo identification you will be presenting at the airport.



Company Information

- Input your employee id (this can be found on your Leave and Pay Exceptions Report).
- Search for your supervisor's name under the manager section by clicking the blue box with three dots to the right of the field.
- Input your department or project name in the Department/Project field. Please note that there is a character limitation. If you need to abbreviate your Department/Project name, please use commonly known abbreviations.



Instructions for Creating a Concur Profile

Contact Information

1. You must enter either a work or a home phone number. You may enter both if you choose.

The screenshot shows a form titled "Contact Information" with a "Go to top" link in the upper right corner. The form contains several input fields: "Work Phone [Required**]", "Work Extension", "Work Fax", "2nd Work Phone/Remote Office", "Home Phone [Required**]", "Pager", "Other Phone", "Mobile Phone Country" (a dropdown menu currently showing "United States of America (+1)"), and "Mobile Phone". A red-bordered box at the bottom of the form contains the text: "**You must specify either a home phone or a work phone." Below the form is a blue "Save" button.

TSA Secure Flight

1. Select your gender
2. Input your date of birth in mm/dd/yyyy format.

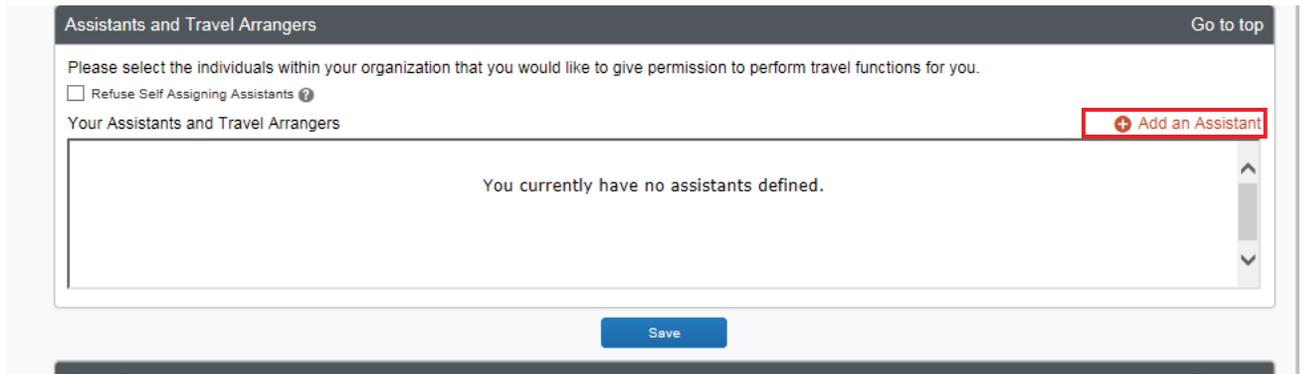
The screenshot shows the "TSA Secure Flight" section of a form. It includes a disclaimer: "The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV." Below the disclaimer are fields for "Gender [Required]" (with radio buttons for "Male" and "Female"), "Date of Birth (mm/dd/yyyy) [Required]" (with a calendar icon), "DHS Redress No.", and "TSA Pre Known Traveler Number". Below this is a section titled "International Travel: Passports and Visas" with a "Go to top" link. It contains the text: "Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier." Underneath is a "Passports" section with a checkbox "I do not have a passport". Below that is a table with columns: "Passport Nationality", "Passport Number", "Date Issued", "Place Issued (City, State)", "Country Issued", and "Passport Expiration". At the bottom of the table is an "Add a Visa" button with a plus sign icon. A blue "Save" button is located at the bottom of the entire form.

Instructions for Creating a Concur Profile

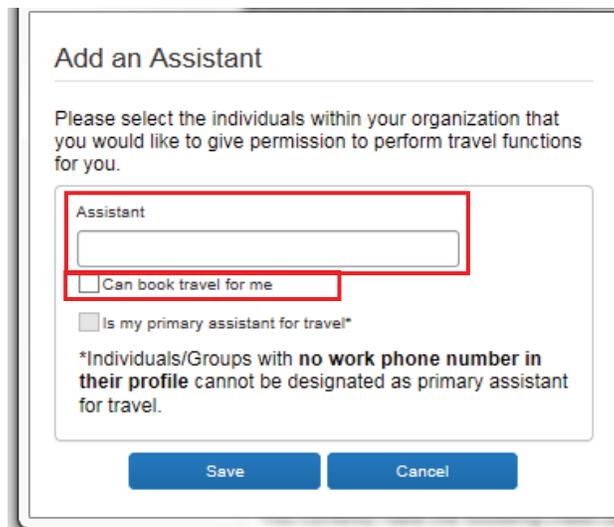
Assistants and Travel Arrangers (Optional)

If your travel will be booked by an assistant or a travel arranger, you must provide authorization under the Assistants and Travel Arrangers section.

1. Click on the Add an Assistant Link



2. Begin typing the name of the individual who will be authorized to book your travel. Select the individual once their contact information appears. The assistant must be an existing Concur user.
3. Check the box next to “Can book travel for me”.

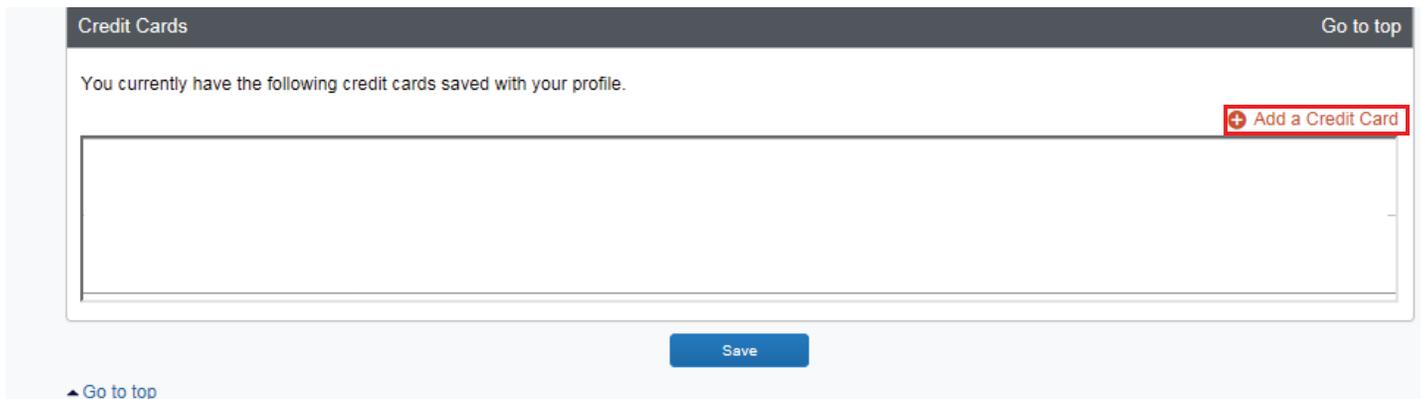


Instructions for Creating a Concur Profile

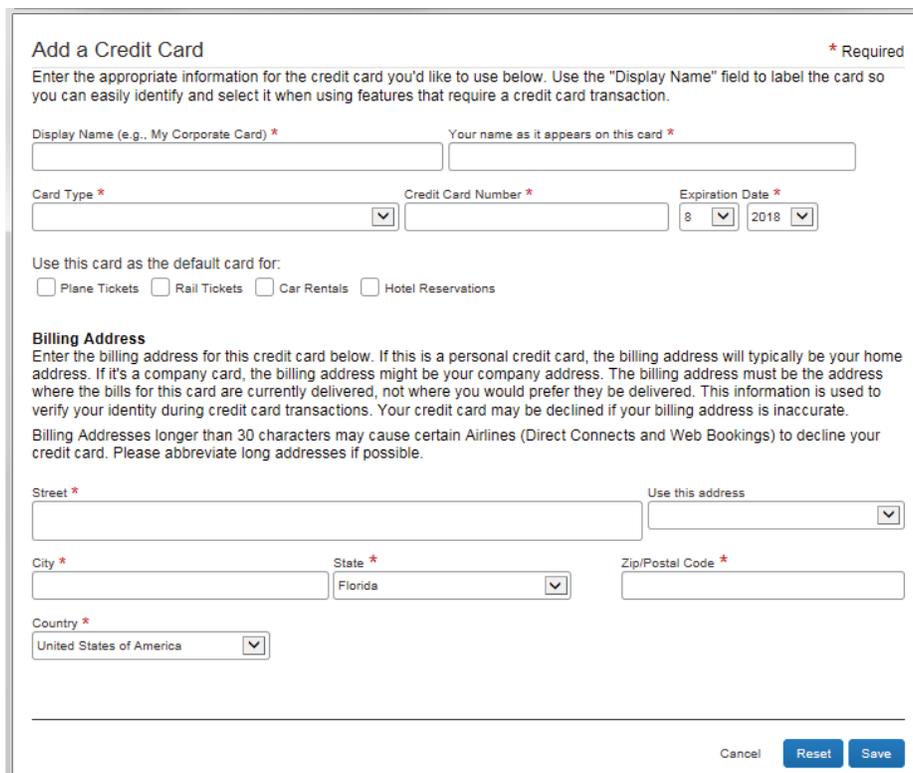
Credit Cards

You must have a credit card saved in your profile in order to book travel through Concur. If you have a university PCard, university related travel should be booked using this payment method. If booking will be completed by a travel arranger, you do not have to add a credit card. Travel may be booked using the travel arranger's card.

1. Click the "Add Credit Card" link to add a new credit card.



2. Enter all required information in the Add a Credit Card form. Required information is denoted by an *.



Save your profile. You are now ready to begin booking travel via Concur.