

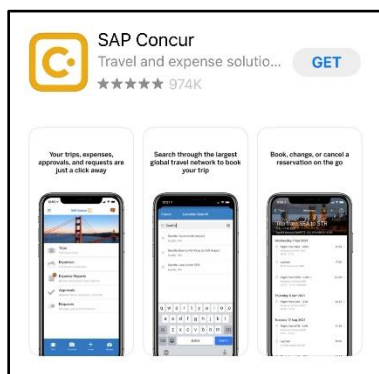


Concur First Time User Checklist

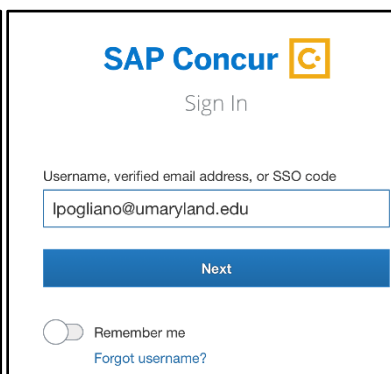
Check out Your Need-to-Do's When Concur Goes Live on April 10th!

- ✓ **First and foremost**, get up to speed on important changes to [Travel policy and procedure](#).
- ✓ **Complete the Role Request form (Travel admins and Center Approvers only)**. All approvers must complete a Concur Role Request Form for the approver role. All User Authorization forms are available [here](#). You'll need to login with your UMID.
- ✓ **On Go-live day, sign into the myUMB portal**. The Concur Travel and Expense icon will be in your Administrative Systems section, or near your timesheet.
- ✓ **Create your Concur profile settings after Go-live**. Concur Travel and Expense forms require specific settings to work correctly. Step through how to [set up your profile correctly here](#).
 - Complete the home address and emergency contact sections
 - Verify your work email address
 - Add a Visa or passport if you travel internationally
 - Add a default vehicle if you plan to use mileage as an expense
 - Add a delegate if someone will perform Concur functions on your behalf
- ✓ **Set up the Concur Mobile application**. Get a link to download the Mobile app through your settings, or visit an App store for your phone type. With your verified email address, you can sign in and it will recognize your Concur account at UMB.

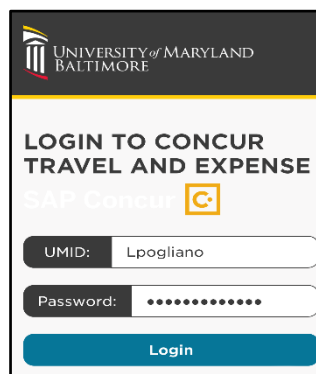
Step 1



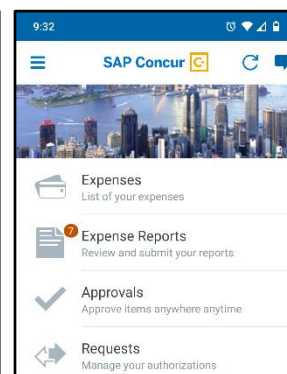
Step 2



Step 3



Concur Home Screen



- ✓ **Download the Triplt app for your phone**. Triplt Pro is a paid app provided to Concur users. That's you! Triplt syncs your travel bookings to your calendar and helps manage your itinerary while you're on the road.
- ✓ **Get Trained!** Travel Admins will be trained by an instructor before the campus goes live. All other users can access training tutorials via the myUMB portal.