Step-by-Step Guide

Updating Your Profile in the Concur Travel & Expense System

Why update your Concur Profile?

Your Profile within the Concur Travel & Expense System stores your personal information, some of which is required by the federal Transportation Security Administration (TSA) to fly. Your Concur Profile information will be referenced when you book a trip through Concur Travel or through Christopherson Business Travel (CBT).

Who can update your Concur Profile?

Ultimately, you are in charge of your Concur Profile. The **required** information can be updated by yourself, your delegate, or your travel arranger. Some of the **optional** information can only be updated by yourself or your travel arranger – not by your delegate.

Accessing Your Concur Profile

- Begin by accessing Concur via <u>your campus portal</u>. Locate your CU Resources section and, under the Business Applications area, select the Concur Travel & Expense System link.
- 2. From your Concur home page, click **Profile** (upper left corner of the screen).
- 3. Select the **Personal Information** area.

Updating Your Concur Profile: Required Information

Four pieces of information are required to use Concur Travel – the remainder is at your discretion to complete. The first time you update your Concur Profile, you must ensure all four required pieces of information are complete **before** you save. You can then update and save each section separately as needed.

The four required pieces of information are:

1. Your Name: Verify that your name is correct, including your Middle Name and Suffix. This should match the government-issued photo ID – such as a driver's

license or passport – you will present to airport security.

2. Company Information: Verify

that your Employee ID and Manager

ïtle	First Name [Required]	Middle Name [Required]	Nickname	Last Name [Required]	Suffix	
~	Charles	Mario		Martinet	VI	
		No Middle Name				
ompany	/ Information					
ompany	/ Information					
ompany mployee	r Information					
ompany mployee 00527	/ Information = ID					
ompany nployee 00527	r Information 1D					
ompany mployee 200527 Nanager	Information	Position/Title		Org. Unit/Division		

appear correct. The individual listed as Manager will receive emails when your trips are booked. These fields are populated from HRMS and cannot be updated in Concur. Contact your Payroll Liaison to make changes in HRMS.

Step-by-Step Guide

Updating Your Profile in the Concur Travel & Expense System

3. Contact Information: Enter either a Work Phone or Home Phone. (Both are

noted as required, but only one must be provided.)

Also, verify E-mail 1: It is populated from HRMS and cannot be updated in Concur. Contact

Contact Information				<u>Go to top</u>			
Work Phone [Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office				
3038372161							
Home Phone [Required**]	Pager	Other Phone	Mobile Phone				
3038372161							
Mobile Carrier							
	Send Test Message						
**You must specify either a home pho	**You must specify either a home phone or a work phone.						
Please check which of the following e	-mail addresses to use to contact you re	garding travel arrangements.					
E-Mail Addresses							
E-mail 1 [Required**]							
E-mail 2							
E-mail 3							
L							

your Payroll Liaison to make changes in HRMS. (Each e-mail address listed in this section will be sent emails of trip itineraries when trips are booked.)

4. **TSA Secure Flight:** Select your gender and enter your date of birth.

Once all four	TSA Secure Flight				
required pieces of	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 <u>WWW.TSA.GOV</u> .				
information are	Gender [Required] Date of Birth (mm/dd/yyyy) [Required] DHS Redress No.				
complete, click	O Male O Female				
Save at the bottom	International Travel				
of this section to	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.				
	Passport Nationality Passport Number Passport Date Issued (mm/dd/yyyy)				
save changes to	Passport Expiration (mm/dd/yyyy) Passport Place Issued (City, State / Country)				
the required					
information.	Save				

Updating Your Concur Profile: Optional Information

Completion of the rest of your Concur Profile is optional, but is recommended to streamline the travel booking process.

Use the **Travel Preferences** section to identify:

- Your air travel preferences such as seat (aisle or window), row (front or back of plane), and departure airport
- Your hotel preferences such as room type (king or queen bed), accessibility, and amenities
- Your car rental preferences such as car type (economy or mid-size) and car transmission (automatic or manual)

You can also enter your travel-related loyalty programs and favorite hotels. (You must first book a hotel through Concur before you can a

Travel Preferences	<u>Go to top</u>
Eligible for the following discount travel rates/fare classes	
🗖 AAA 🗖 Government 🗖 Military 🗖 Senior/AARP	
Air Travel Preferences	
Seat Row Special Meals Ticket Delivery	
Aisle 🔹 Don't Care 💌 Regular Meal 💌 E-ticket when possible 💌	
Preferred Denarture Aimort Other Air Travel Preferences	
Medical Alerts	
,	
Hotel Preferences	
Room Type Smoking Preference	
Don't Care VINOn-smoking VI Foam pillows Rollaway bed Crib	
Message to Vendor	
I prefer hotel that has:	
🗖 a gym 🗖 a pool 🗖 a restaurant 🗖 room service 🗖 Early Check-in	
Accessibility Needs	
👃 🗖 Wheelchair access 🔲 Blind accessible	
Car Rental Preferences	
Car Type Smoking Preference Car Transmission	
Any Car Class Don't Care Automatic In-car GPS system Ski rack	
,, _, _ ,	
Message to Vendor	
Frequent-Traveler Programs	
Your Frequent Traveler, Driver, and Hotel Guest Programs	+ Add a Program

book a hotel through Concur before you can add it as a favorite hotel.)

Step-by-Step Guide

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Use the **International Travel** section to identify your international travel information. Even though Concur can only be used to book domestic travel, this section is used by Christopherson Business Travel to obtain your passport and visa information when needed.

International Travel: Passports and Visas	<u>Go to top</u>
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.	
Passports	+ <u>Add a</u> Passport
International Visa	<mark>+</mark> Add a Visa

Use the **Assistants and Travel Arrangers** section to identify your travel arrangers. Refer to the Step-by-Step Guide <u>Identifying Travel Arrangers</u> for further information.

Assistants and Travel Arrangers		<u>Go to top</u>	
Please select the individuals within your organization that you would like to give permission to perform travel functions for you.			
Refuse Self Assigning Assistants W			
Your Assistants and Travel Arrangers		+ Add an Assistant	
Bamiano-Nittoli, Leslie M. (Primary Travel Asst.)	Can book travel? 🗹	2 X	
Save			