



# TravelWayne

Update Your User Profile

# Section 1: Update Your Travel Profile

Before you use Travel for the first time, update your profile. You must save your profile before you first attempt to book a trip in Travel.

If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the Profile page).

## Step 1: Change your Time Zone, Date Format, or Language

### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **System Settings**.
3. On the **System Settings** page, update the appropriate information, and then click **Save**.

### Additional Information

You can change the system and regional settings (number, currency, date, and time format).

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

**My Concur** | Travel | Expense | Invoice | Reporting | Administration | **Profile**

Personal Information | Change Password | **System Settings** | Mobile Registration | Travel Vacation Reassignment | System E-Mail Settings

**My Profile**

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

**Expense Settings**

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

**Invoice Settings**

- Invoice Information
- Invoice Delegates
- Invoice Preferences
- Invoice Approvers

**Other Settings**

- E-Receipt Activation
- System Settings**
- Change Password
- Privacy Statement
- System E-Mail Settings
- Travel Vacation Reassignment
- Mobile Registration
- I'm Assisting...

**Regional Settings and Language**

Default Language: English (United States)   
 Number Format: 1,000.00   
 Placement of Currency Symbol: Before the amount   
 Negative Number Format: -100   
 Negative Currency Format: -100   
 Date Format: mm/dd/yyyy   
 Time Format: h:mm AM/PM   
 Hour/Minute Separator: :  09/20/2010 3:23 PM  
 Time zone (local time): (GMT-08:00) Pacific Time (US & Canada; Tijuana)

**Calendar Settings**

Start week on: Sunday   
 Start Day View At: 8:00 AM   
 End Day View At: 8:00 PM   
 Default View: month

**Other Preferences**

Home Page: My Concur    
 Rows per page: 25

**Travel Settings**

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails
- Do you want to receive an email each time you book travel? Unchecking this box will not stop emails to your assistant or arranger if you use one.
- Send Trip-on-Hold Reminder Emails
- Do you want to receive an email each time you place a trip on hold? Unchecking this box will not stop emails to your assistant or arranger if you use one.
- Send Ticketed Travel Reminder Email
- Do you want to receive an email when a trip you've booked is ticketed? Unchecking this box will not stop emails to your assistant or arranger if you use one.

# Section 2: Update Your Travel Profile (Continued)

## Step 2: Update Your Personal Information

### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **Personal Information**.
3. On the **My Profile** page, update the appropriate information, and then click **Save**.

### Additional Information

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

Complete these sections of your travel profile:

- Name & Airport Security
- Home Address
- Work Address
- Contact Information
- Emergency contact
- Travel Preferences
- Credit Cards

You must complete all fields marked **Required** (in orange) to save your profile.

Verify that the first and last name fields match the ID used at the airport.

If you cannot edit these fields, contact your travel agency or travel manager to make changes.

The country you select in the work address fields will determine the default map that appears on the **Concur Travel Map** tab.

There are several **Save** buttons on the profile page. You only need to save once as every **Save** button saves the entire profile.

**My Profile**

[Home Address](#) [Work Address](#) [Contact Info](#) [Emergency Contact](#) [Travel Preferences](#) [Assistants](#) [Credit Cards](#)

**Your Information**

Personal Information  
Company Information  
Contact Information  
Emergency Contact  
Credit Cards

**Travel Settings**

Travel Preferences  
International Travel  
Frequent-Traveler Programs  
Assistants/Arrangers

**Expense Settings**

Expense Information  
Expense Delegates  
Expense Preferences  
Expense Approvers  
Favorite Attendees

**Invoice Settings**

Invoice Information  
Invoice Delegates  
Invoice Preferences

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me

Fields marked **[Required]** must be completed to save your profile. [Change Picture](#)

**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title  First Name **[Required]**  Middle Name  Nickname  Last Name **[Required]**  Suffix

No Middle Name

Concur Cost Center

**Company Information**

Employee ID  Exchange Login

Manager  Position/Title  Org. Unity/Division

## Section 3: Update Your Travel Profile (Continued)

### Step 3: Set Up a Travel Arranger or Assistant

#### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** dropdown menu, click **Personal Information**.
3. Click **Assistants** at the top of the page.
4. Click **Add an Assistant** to search for your assistant's last name.
5. In the **Search Criteria** field, enter the assistant's name
6. Click **Search**.
7. Click the **Assistant** dropdown arrow.
8. Select the appropriate name from the dropdown list.
9. Select **Can book travel for me**.
10. Select **Is my primary assistant for travel**.
11. Click **Save**.

#### Additional Information

Use **Assistants & Travel Arrangers** to give other Travel users the ability to view and modify your profile or book travel and trips for you.

The primary assistant's name and work phone number become part of the traveler's GDS profile, if configured.

**Important:** Your assistant must have an existing Travel account before you can add him or her to your profile.

**Hint:** When searching, use the following format: *LastName,FirstName* (no spaces).

For example: Smith,June

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to have this assistant included on any agency-generated emails about your trips. This will only occur if your Travel Management Company has configured your site to send information to your GDS profile.

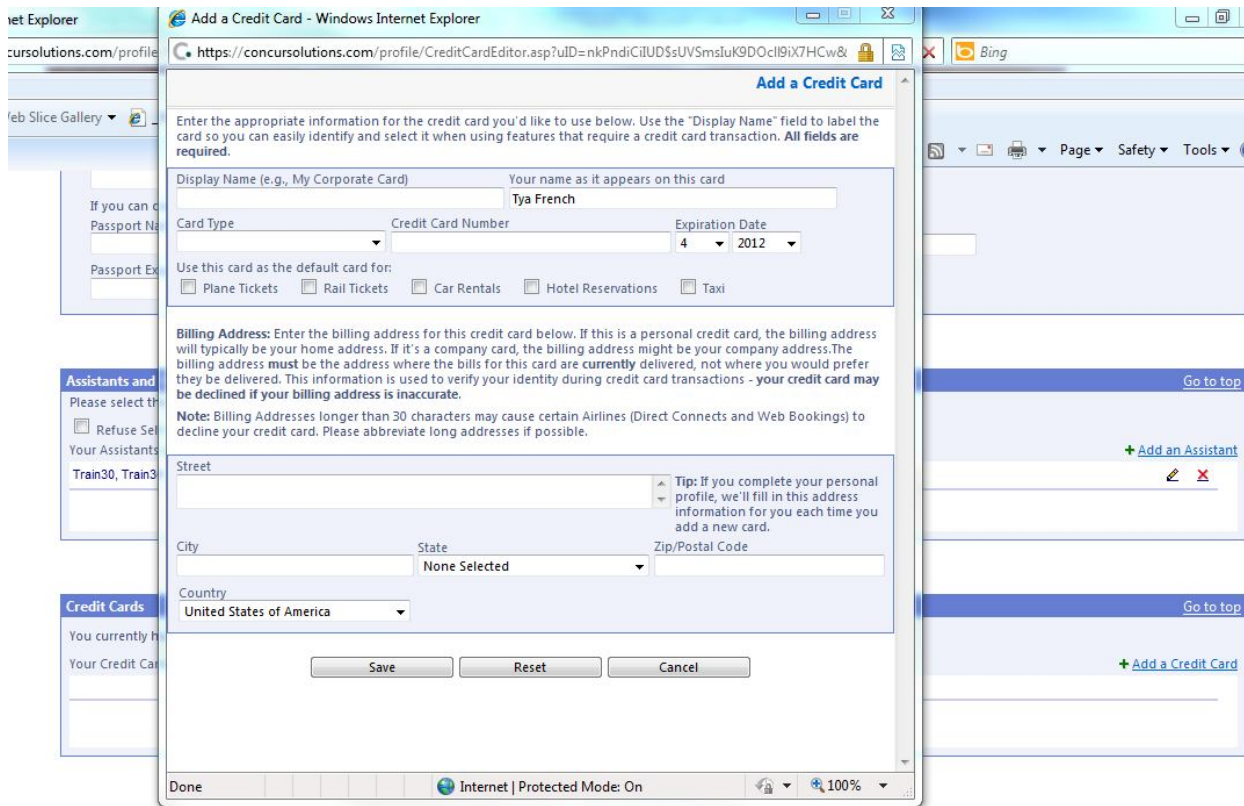
The screenshot shows the 'Add an Assistant' dialog box in a Mozilla Firefox browser window. The browser address bar shows 'https://www.concursolutions.com/profile/Assis'. The dialog box has a title bar 'Add an Assistant - Mozilla Firefox'. The main content area of the dialog includes a search criteria field with 'Chase' entered, a search button, and a dropdown menu showing 'Chase, Grant Edward (grants@concur.com)'. There are two checked checkboxes: 'Can book travel for me' and 'Is my primary assistant for travel\*'. A note at the bottom states: '\*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.' There are 'Save' and 'Cancel' buttons at the bottom of the dialog.

# Section 4: Update Your Travel Profile (Continued)

## Step 4: Set Up Credit Cards

### How to...

1. Click **Profile**. The **My Profile** page appears.
2. Click **+Add a Credit Card**. The **+Add a Credit Card** page appears.
3. Enter **Credit Card information**
4. Click **Save**.




# Section 5: Update Your Travel Profile (Continued)

## Step 5: Set Up Bank Information

### How to...

1. Click **Profile**. The **My Profile** page appears.
2. Click **Bank Information**. The **Bank Information** page appears.
3. Enter your **Banking information**
4. Click **Save**.

**Concur** 

My Concur Request Travel Expense Reporting Administration **Profile**

Personal Information Change Password System Settings Mobile Registration

**My Profile**

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

**Travel Request Settings**

- Travel Request Information
- Travel Request Delegates
- Travel Request Preferences
- Travel Request Approvers
- Favorite Attendees

**Expense Settings**

- Expense Information
- Bank Information**

**Bank Information**

Bank Country: UNITED STATES Bank Currency: US, Dollar

Routing Number: Bank Account Number: Re-Type Bank Account Number:

Account Type: Checking Status: Active

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.

John Q. Public  
1358 Main St.  
Sometown, OH 98765

Pay to the order of \_\_\_\_\_ Dollars

**Bank of Sometown**

⑆ 234123987 ⑆ 001234567891 ⑆ 1001

Routing Number is usually located between the **Ⓕ** symbols on your check and is 9 digits.  
Account Number is usually located before the **Ⓕ** symbol on your check and is 3-17 digits.



## Section 6: Update Your Travel Profile (Continued)

### Step 6: (Optional) Concur Mobile Apps Registration

#### How to...

1. Click **Profile**. The **My Profile** page appears.

#### Additional Information

The user's Concur user name and mobile Personal Identification Number (PIN) are required for mobile login. The mobile PIN is specifically for Concur's mobile app and is different from the password used in the web version of Concur.

The registration page is asking the user for a Concur user name and password. Since the user logs in to the web version via his/her company portal (single sign-on), the user does not know the Concur login information. What should the user do?

Single sign-on users should log into the web version of Concur using pipeline

2. On the left hand side under **Other Settings** select **Mobile Registration**

3. Enter and verify the PIN, and then select **Update/Create Mobile PIN**.

The screenshot shows the Concur web interface for user Sandy Hale. The 'Mobile Registration' section is active, displaying a 'Set PIN' form. The form includes fields for 'User Name' (pre-filled with 'SandyHale@VerbSlayer.com') and 'Mobile PIN', with a 'Verify Mobile PIN' field and a 'Create/Update Mobile PIN' button. Below the form, there are instructions for downloading the Concur mobile app from the BlackBerry App World, the Android Market, or the iPhone App Store. A QR code is also visible. Three callout boxes are overlaid on the screenshot:

- 1) Create your mobile PIN.
- 2) Obtain the mobile app from the App World, Store or Android App
- 3) Select **Learn more** for more information, FAQs, and demos.

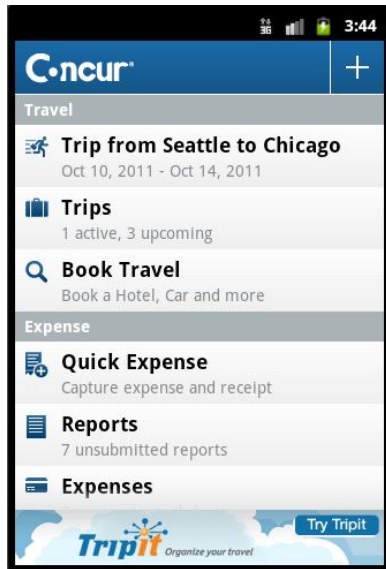
## Logging On to Concur



Locate the Concur icon, which may be on the home screen of your device or in your device's folder for downloads.

Start the application and log in with your Mobile PIN.

The Concur home screen appears. The home screen shows your current trip and provides access to your other trips, expenses, expense reports, and more.



**NOTE:** If your company uses Single Sign On (SSO), you may be directed to your company's mobile page where you log in with your regular company network credentials.



Concur

Username / Email:  
terrybrown@foregone.com

PIN:  
|

Login

Having Trouble Signing In?

Need to set your PIN?



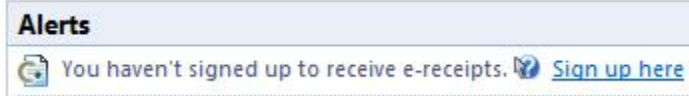
# Section 7: Update Your Travel Profile (Continued)

## Step 7: (Optional) E-Receipts Activation

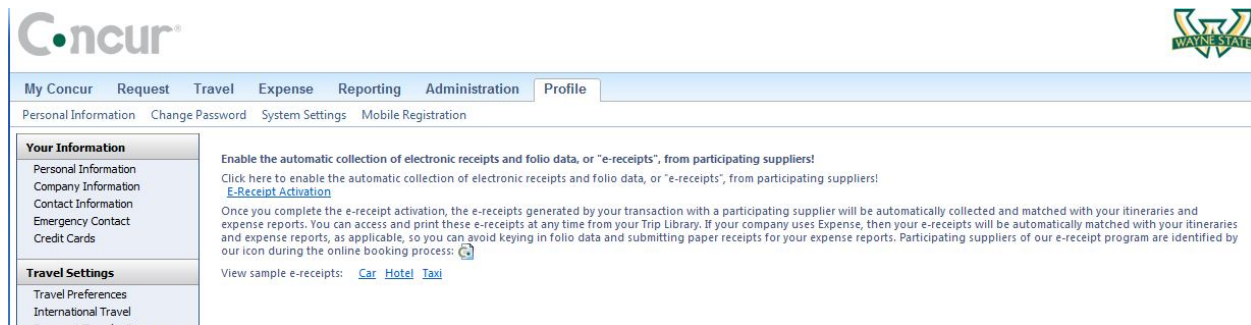
**How to...**

**Additional Information**

1. On the **My Concur** page click **Profile**
2. Click **E-Receipt Activation** or Click **Sign up Here**



Once you complete the e-receipt activation, the e-receipts generated by your transaction with a participating supplier will be automatically collected and matched with your itineraries and expense reports. You can access and print these e-receipts at any time from your Trip Library. If your company uses Expense, then your e-receipts will be automatically matched with your itineraries and expense reports, as applicable, so you can avoid keying in folio data and submitting paper receipts for your expense reports. Participating suppliers of our e-receipt program are identified by our icon during the online booking process:



3. Review the **E-Receipt Activation and Use Agreement**
4. Click **I Accept**

