

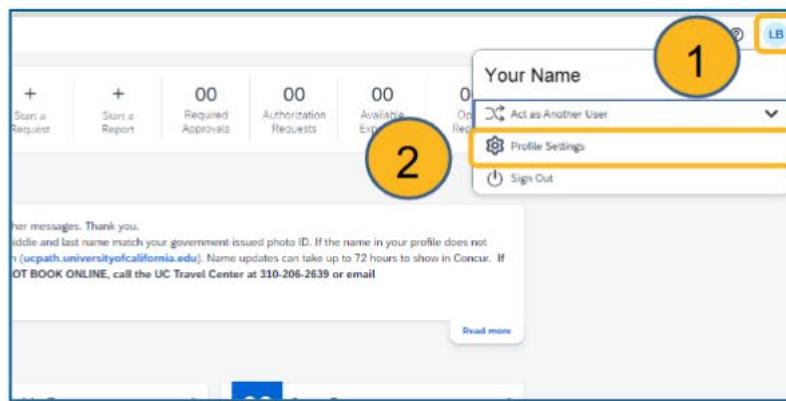
Updating Your Profile

From your Profile, you can update information such as personal information, contact information, and emergency contacts. You can set your travel preferences, add your delegates, and add favorite attendees for use in expense reports.

Watch ▶ the tutorial.

Please note, this is a 3rd party video which provides an overview of the steps. For specific instructions for UCLA, please refer to this written guide.

1) From the Concur dashboard, click your **initials** on the top right corner.



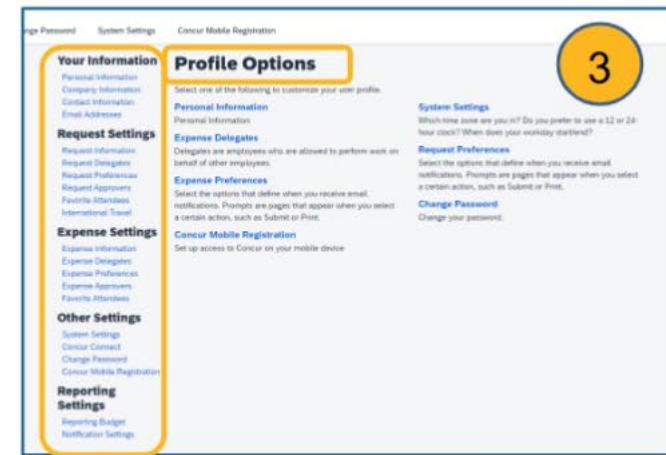
2) Click **Profile Settings**

3) You will find the most common profile tasks on the Profile Options page. You can also use the menus on the left to select a setting to update.

Use the following sections to start updating your Expense Profile:

- **Your Information** – Review and update your personal information, contact information*, and emergency contacts.
- **Verify your Email addresses** and add or update credit cards that are available to use for purchases.
- **Expense Settings** - **Add delegates** that can create and edit expense reports and can submit requests for you. Add favorite attendees for your use in expense reports.
- **Request & Expense Preferences** – Use to set preferences on email notifications
- **Travel Preferences** - Use to add air/car/hotel booking preferences including frequent/secure flyer info, passports, etc.
- **Other Settings** - [Activate E-receipts](#), configure system settings, and register your mobile devices.

*Please check your profile to ensure your first, middle and last name match your government-issued photo ID. If the name in your profile does not match your government-issued photo ID, please update your legal name in [UCPath](#). Name updates can take up to 72 hours to show in Concur.

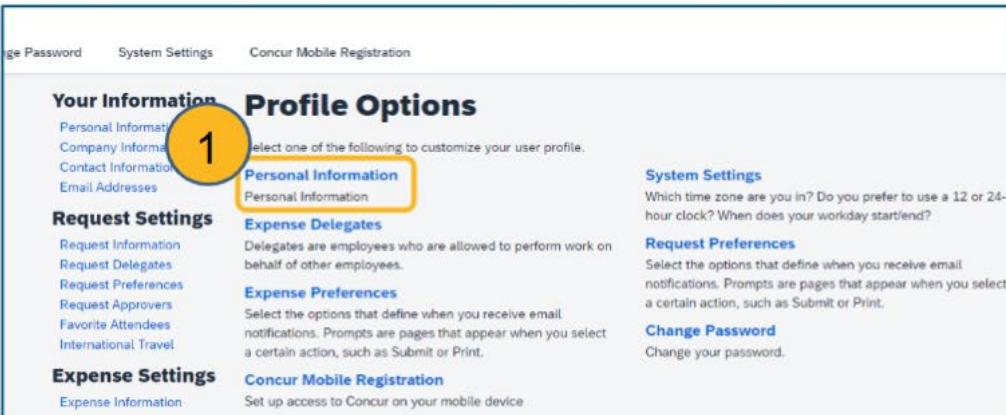


Updating Your Profile

Updating Your Travel Profile

You or your delegate must update your **Concur Travel Profile** prior to making a travel reservation via UCLA Concur Online or UC Travel Center Agent. Your legal name (first, middle and last) as shown on your government-issued photo ID must match the name on your Concur Travel Profile.

1) From **Profile Options**, click **Personal Information**



The screenshot shows the 'Profile Options' page. At the top, there are links for 'Change Password', 'System Settings', and 'Concur Mobile Registration'. Below these are three main sections: 'Your Information' (with a yellow circle containing the number 1 over the 'Personal Information' link), 'Request Settings', and 'Expense Settings'. The 'Your Information' section also includes 'Expense Delegates' and 'Concur Mobile Registration'. To the right, there are sections for 'System Settings' (time zone, 12/24-hour clock, workday start/end), 'Request Preferences' (email notifications, prompts), and 'Change Password' (change password).

2) Read the **Important Note** regarding steps to take if you need to update your Legal Name as well as the reminder to NOT book a flight online if your name in Concur does not match the name on the government-issued ID.

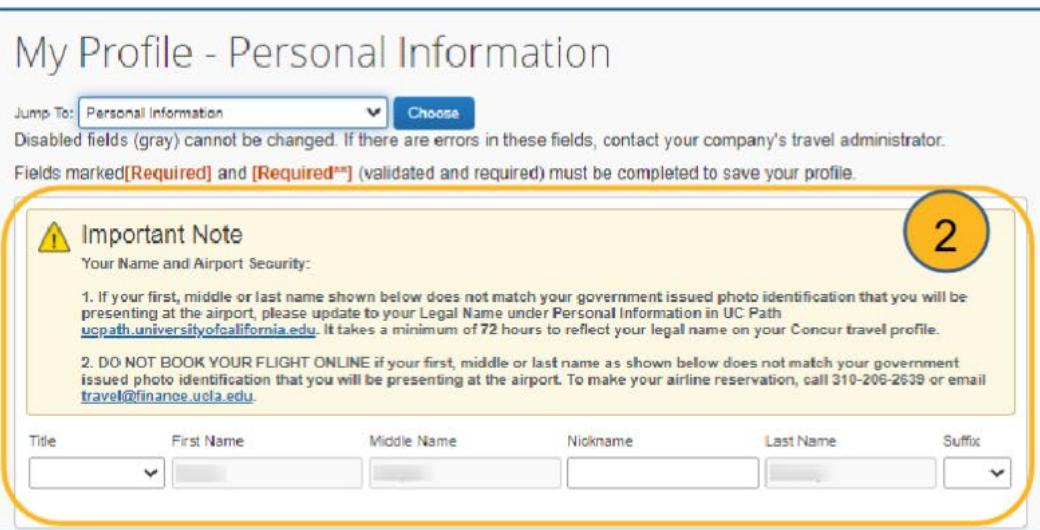
To update your profile, verify or enter:

- Your **Middle Name** or check the box to indicate you have no middle name
- Your **Work and Home Phone** number
- Your **Birthdate**
- Your **Gender**

After entering the following mandatory profile information, click **Save**

Note: Without the above-required information, you **will not be able** to make flight reservations.

You may see a pop-up alerting you to missing profile information. Please provide the missing information.

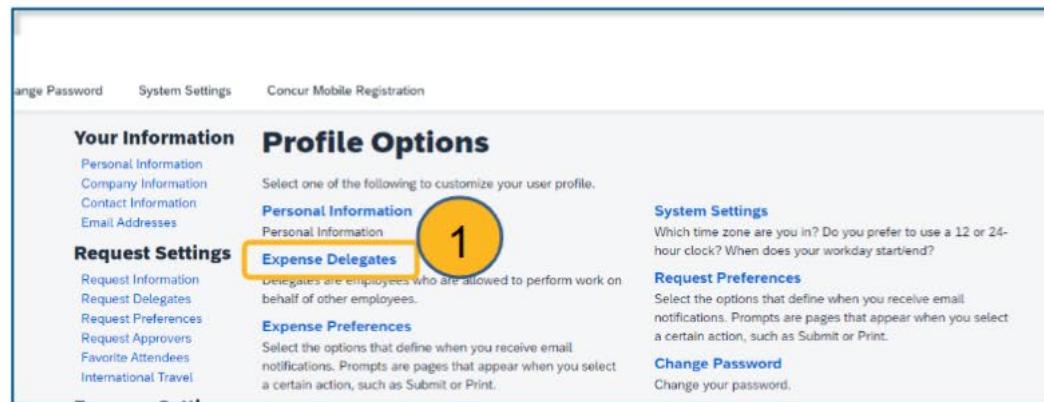


The screenshot shows the 'My Profile - Personal Information' page. At the top, there is a 'Jump To' dropdown set to 'Personal Information' with a 'Choose' button. Below this, a note states: 'Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.' A yellow box with a yellow circle containing the number 2 highlights the 'Important Note' section. This section contains two bullet points: 1. A reminder to update legal name if it doesn't match photo ID. 2. A reminder not to book flights online if names don't match. Below this, there is a form with fields for Title, First Name, Middle Name, Nickname, Last Name, and Suffix, all of which are currently grayed out.

Updating Your Profile

Adding a Delegate

1) To add a delegate to your profile, click **Expense Delegates**.



Profile Options

Select one of the following to customize your user profile.

Personal Information

Personal Information

Expense Delegates 1

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

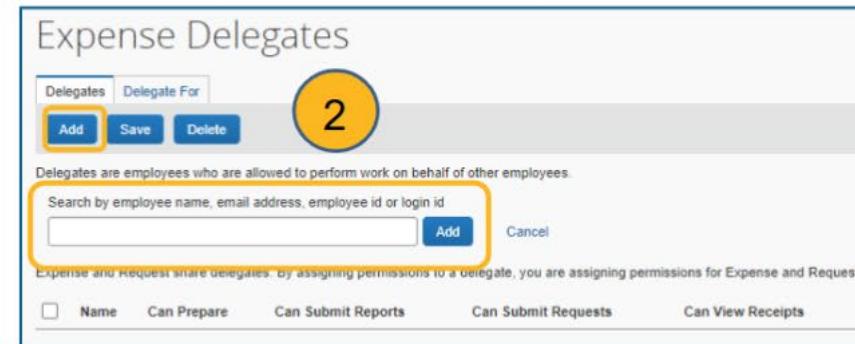
Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

Change your password.

2) Click **Add** and search for and select the employee(s) you want to add by finding their name and clicking **Add** by the search field.



Expense Delegates

Delegates 2 Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id Add Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

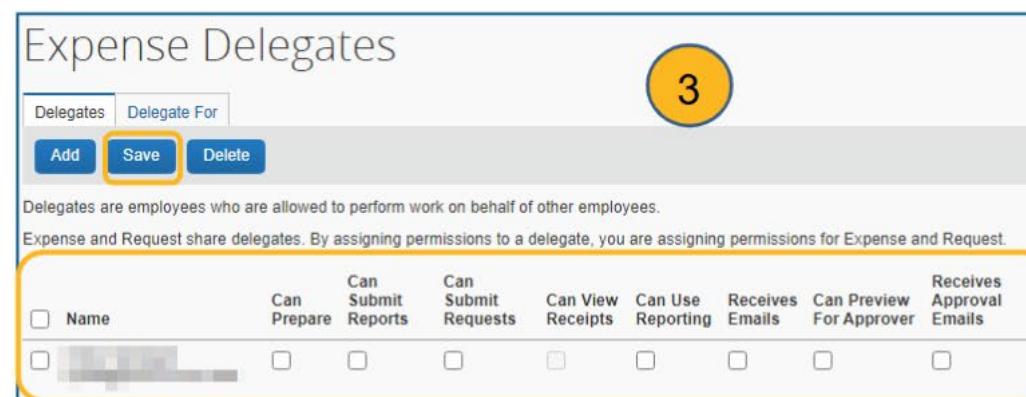
Name Can Prepare Can Submit Reports Can Submit Requests Can View Receipts

3) Using the checkboxes, specify which tasks you want the delegate to perform on your behalf. Typically, users check **all the check boxes** for delegates they wish to allow to prepare reports on their behalf.

(Only Approvers will have the **Can Preview for Approver** and **Receives Approval Emails** checkboxes.)

Click **Save**.

Note: Although a delegate can prepare the report and get it ready for submittal, the user will need to submit their own report. To enable the delegate to prepare reports and get them ready for submittal, make sure the **Can Prepare** and **Can Submit Reports** boxes are checked.



Expense Delegates

Delegates 3 Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

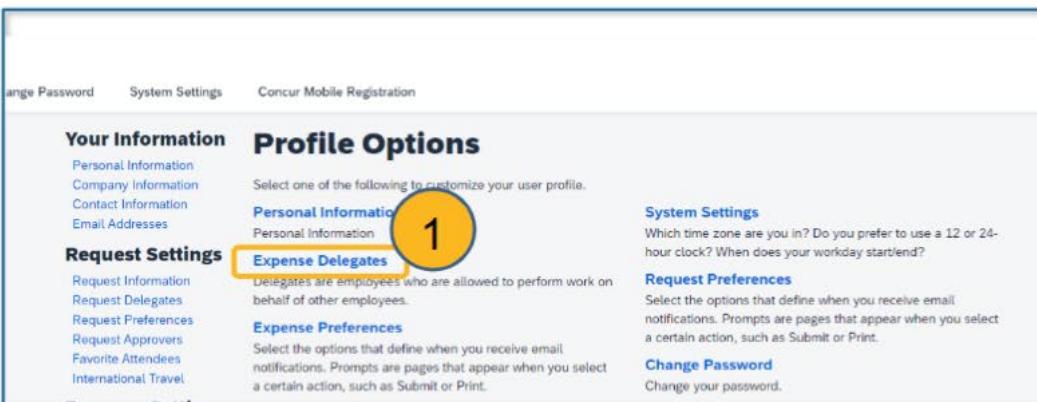
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	<input type="checkbox"/> Can Prepare	<input type="checkbox"/> Can Submit Reports	<input type="checkbox"/> Can Submit Requests	<input type="checkbox"/> Can View Receipts	<input type="checkbox"/> Can Use Reporting	<input type="checkbox"/> Receives Emails	<input type="checkbox"/> Can Preview For Approver	<input type="checkbox"/> Receives Approval Emails
[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Updating Your Profile

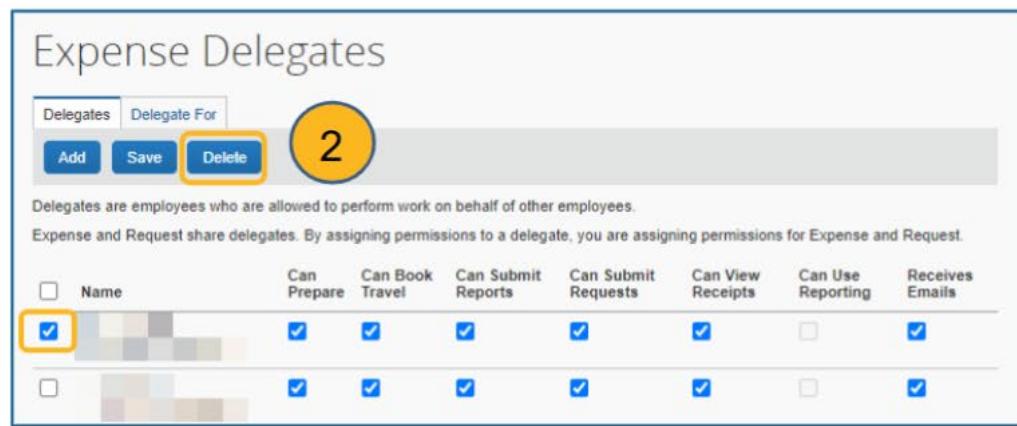
Removing a Delegate

- 1) To remove a delegate to your profile, click **Expense Delegates**.



- 2) Click the checkbox next to the name of the person you want to remove.

Click **Delete**.



- 3) In the pop-up window, click **OK** to confirm that you want to remove the delegate. The delegate is then removed from the list of delegates.

