# UCLA Express

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.
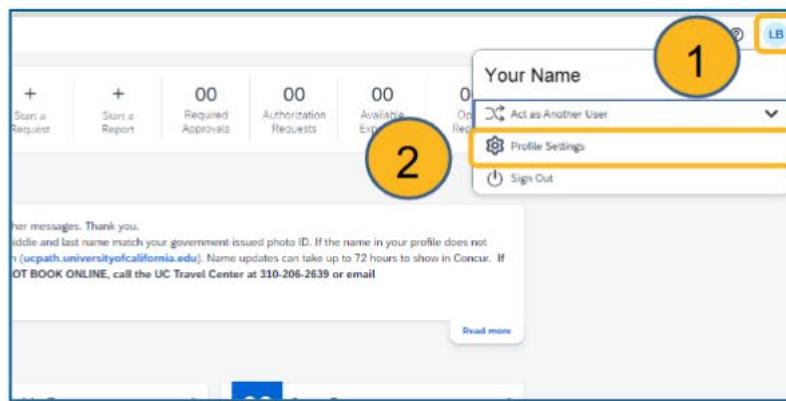
2) Click **Profile Settings**

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.
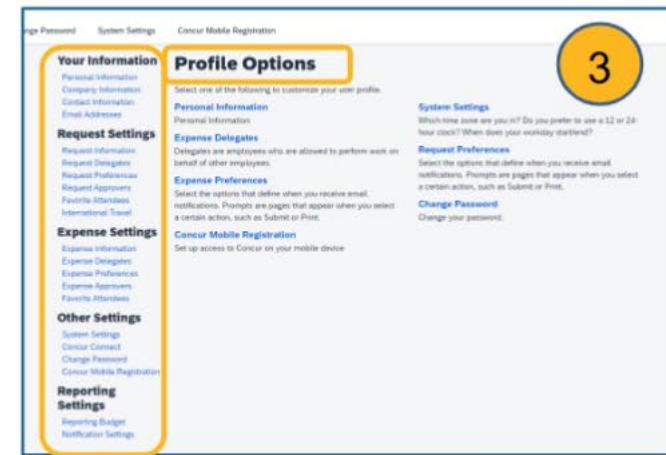
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Updating Your Travel Profile

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**

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.

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Adding a Delegate

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

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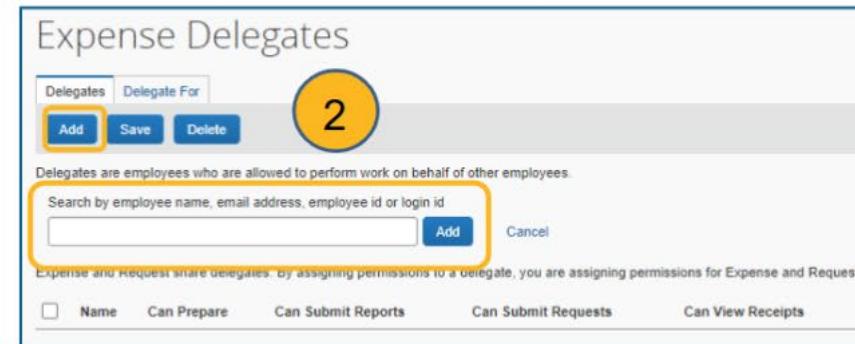
3) Using the checkboxes, specify which tasks you want the delegate to perform on your behalf. Typically, users check **all the check boxes** for delegates they wish to allow to prepare reports on their behalf.

(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.

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Removing a Delegate

1) To remove a delegate to your profile, click **Expense Delegates**.
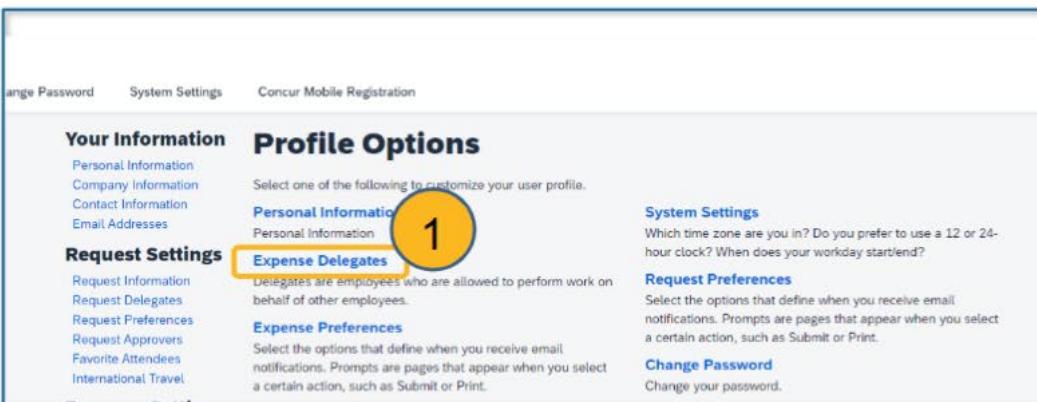
2) Click the checkbox next to the name of the person you want to remove.

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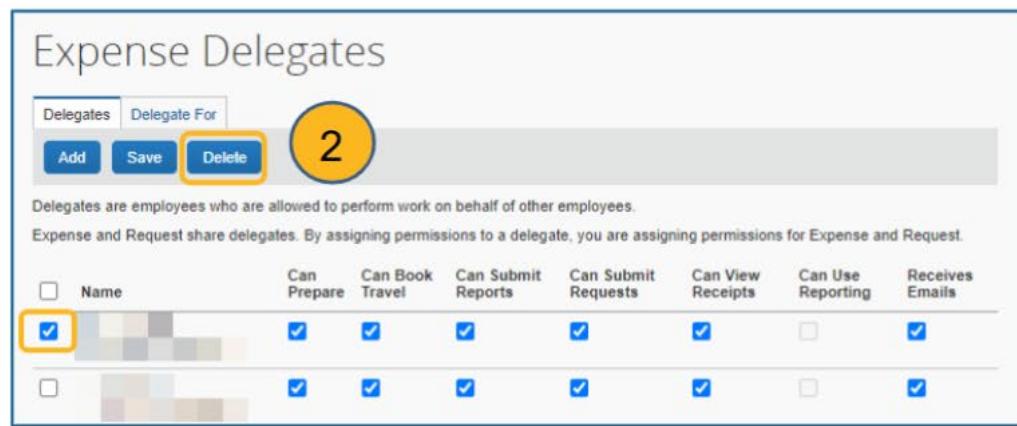
3) In the pop-up window, click **OK** to confirm that you want to remove the delegate. The delegate is then removed from the list of delegates.

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