

# Cliqbook/Concur – Profile Information

## Update Your Travel Profile

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

Your company decides if you can change your password. If allowed, you will change your password on the Profile tab.

### How to...

1. On the **My Concur** page, select **Profile** from the menu at the top of the page.
2. On the **Profile** submenu, click **Change Password**.
3. In the **Old Password** field, enter your current (temporary) password.
4. In the **New Password** field, enter your new password.
5. Verify your new password by re-entering it in the **Re-enter Password** field.
6. Enter a word or phrase in the **Password Hint** field to act as a reminder if you forget your password, and then click **Save**.

### Additional Information

If your company uses Single Sign On, you access Concur Travel via your company's intranet. If that is the case, you will not see this option on the Profile menu nor will you be able to change your password.

To change your password, you need to know your old or temporary password.

**Concur™** Welcome, Sue Peterson

My Concur Travel Expense Administration **Profile** Help Log Out

Personal Information Change Password System Settings Travel Vacation Reassignment Change E-Mail Settings

**My Profile**

**Your Information**

- Home Address
- Company Address
- Contact Information
- Emergency Contact
- Credit Cards

**Travel Preferences**

- Air Travel Preferences
- Hotel Preferences
- Car Rental Preferences
- International Travel
- Assistants/Arrangers

**Other Settings**

- System Settings
- Set-up Checklist
- Change Password**
- Privacy Statement
- System E-mail Settings
- Travel Vacation Reassignment

**Change Password**

A password must be at least 6 characters. It must contain at least one character that is not a letter and may contain numbers (0-9), upper and lower case characters (A-Z, a-z), and symbols (such as %\*@#). It cannot contain spaces. All fields are required.

**NOTE: Passwords are case sensitive.**

This will change your password in both Cliqbook and the Concur Expense system.

Old Password New Password Re-enter New Password

Password Hint (we will email this to you if you forget your password)

Submit Cancel

# Update Your Travel Profile (Continued)

## Step 2: 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, currently, 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.

**Concur** Welcome, Sue Peterson

My Concur Travel Expense Administration **Profile** Help Log Out

Personal Information **System Settings** 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

**Other Settings**

- E-Receipt Activation
- System Settings**
- Privacy Statement
- System E-mail Settings
- Travel Vacation Reassignment

**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

mile/km: mile

Date Format: mm/dd/yyyy

Time Format: h:mm AM/PM

Hour/Minute Separator: : 12/09/2008 3:03 PM

Time zone (local time): (GMT-12:00) Eniwetok, Kwajalein

**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

Save Reset Close

# Update Your Travel Profile (Continued)

## Step 3: 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

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

Other Settings

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


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

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** must be completed to save your profile.

[Change Picture](#)



**Your Name and Airport Security:** Please make certain that the first 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

Middle Name

Nickname

Last Name

Suffix

Sue

Peterson

Company Information

Employee ID

003005

Manager

Position/Title

Org. Unit/Division

Terry Brown

# Update Your Travel Profile (Continued)

## Step 4: 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 Concur Travel users the ability to view and modify your profile or book travel and trips for you.

**Important:** Your assistant must have an existing Concur 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 allow the assistant to view, make changes to, and modify your profile.

The screenshot shows two overlapping windows from the Concur system. The background window is titled 'Assistants and Travel Arrangers' and contains sections for 'Refuse Self Assigning Assistants', 'Your Assistants and Travel Arrangers' (currently empty), and 'Credit Cards' (showing a VISA card). The foreground window is a modal dialog titled 'Add an Assistant' from Mozilla Firefox. It has a search bar with 'smith, john' entered, a dropdown menu showing 'Smith, John ()', and two checked checkboxes: 'Can book travel for me' and 'Is my primary assistant for travel\*'. A note at the bottom of the dialog 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.

