Objective

The purpose of this document is to guide Concur users through the process of setting up a travel profile. A travel profile is required in order to book travel in Concur. This document will outline the following:

1. Navigate to Profile
2. Auto-populated Fields
3. Required Fields
4. Adding Travel Assistants and Arrangers

Navigate to Profile

1. After logging into Concur with your OHIO ID and password, click the Profile box in the top right corner and then click Profile Settings.

![Profile Settings](image)

2. This will take you to the Profile Options Page. This page provides an outline of each section in your profile. Click Personal Information to get started.

![Profile Options](image)
Auto-populated Fields

The following fields will be auto-populated and cannot be changed or updated in Concur. These fields are populated in Concur from your HR record in Oracle:

- First Name
- Middle Name
- Last Name
- Suffix
- Employee ID
- Manager
- Employee Position/Title

**Important Note**

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.

If First Name, Middle Name, and Last Name do not match what is listed on the photo identification you would present at the time of travel (e.g. at the airport), contact the Employee Service Center at 740.593.1636 and tell them your name in the system does not match your ID and you need it changed for travel purposes.
Concur Travel Profile Set-up

Required Fields

In order to book travel, you will need to update the following fields in your profile:

1. Work Phone OR Home Phone in the Contact Information section. You do not need to fill out both Work Phone and Home Phone. Add the number you would like to be contacted regarding your travel arrangements in case of delays, cancellations, etc.

![Contact Information](image)

2. TSA Secure Flight Details
   - Gender
   - Date of Birth
   - International Travel: Passports and Visas
     - Add Passport or Visa Info OR select “I do not have a passport”

![TSA Secure Flight](image)

NOTE: You can update this information at any time so if you do not have your passport handy, select “I do not have a passport” and update details at a later date, but be sure to update prior to booking international travel. For details regarding Concur data security and privacy: [https://www.concur.com/en-us/processor-privacy-statement](https://www.concur.com/en-us/processor-privacy-statement).

3. Click Save after each section otherwise your edits will not be saved.
Concur Travel Profile Set-up

Adding Travel Arrangers and Assistants

To simplify the booking process, you can give individuals permission to book travel for you. This is not required.

1. In the Assistants and Travel Arrangers section of your profile, click Add an Assistant.

![Add an Assistant](image)

2. Type the individual’s name and select the correct person from the list. From here, select the appropriate check box (either make them your primary travel assistant or give them permission to book travel).

![Add an Assistant - Google Chrome](image)

**NOTE:** If you select primary assistant, both boxes will automatically be checked. If the user has not added a phone number, the primary assistant box will be greyed you and you will not be able to click it. You can only have 1 primary assistant for travel.

3. Click Save.