



Update Travel Profile

Summary

Note: *Before booking travel for the first time, you will need to review and update your **travel profile** online in Travel and Expense (“Concur”). Even if you don’t make any changes, you must update and save your profile before you can book a trip online or with the travel management company, Collegiate Travel Planners (CTP), for the first time.*

The information from your travel profile is pulled directly into your trip booking and transferred over to the airline, hotel, car rental company, etc. Thus, the more information that is completed in your travel profile, the more that will be pre-populated in your trip bookings.

Access Travel Profile

Concur Homepage

1. At the top right of the Concur homepage, select **your initials (or the person icon)**
2. Select **Profile Settings**
3. **Profile Options** page displays

Profile Options

Most of the common profile tasks are on the Profile Options page. Menu navigation is also available on the left hand side to select a setting to update. To jump to a specific section, click on the name of that section directly (e.g., Credit Card Information, Travel Profile Options, Setup Travel Assistants). Or, scroll up and down once the Profile page is open.



Review details in each section. Fields marked with a red asterisk are required. Complete option fields as desired. Click **Save** after updating or completing each section.

Personal Information

1. Select **Personal Information** to verify your personal information, including **First Name, Middle Name, Last Name**
 - For travel purposes, the **First Name** and **Last Name** in the user's travel profile must match their government-issued identification
 - **Middle Name** - add or update to reflect the middle name as listed in your most commonly used government-issued identification (e.g., driver's license, passport)
2. Fields that are grayed out are not editable. These fields are sourced from the employee's PeopleSync profile or the student's SIS profile. Updates on these fields must be made at the data source..
 - *Employees*: Per the [Change of Name, Pronoun, Gender, and Related Personal Information Policy and Procedure](#), employees can update their legal name by reaching out to their Human Resources Officer/ Human Resources Business Partner or PeopleLink. **Please note that the turnaround time for name changes is 1-3 days.**
 - Note: you are **required to submit documentation** to support your name change request prior to it being actioned.
 - *Students*: Update your legal name in SIS.
3. Enter a **Preferred Name**, if desired

Company Information

Select **Company Information** on the menu of the Profile page or scroll down once in your profile to verify your company information, including **Employee ID, Manager, School/Unit**



Fields that are grayed out are not editable. These fields are sourced from the user's PeopleSync profile. Updates on these fields must be made on the [user's PeopleSync profile](#). Contact [PeopleLink](#) for support.

Contact Information

1. Select **Contact Information** on the menu of the Profile page or scroll down once in your profile to review and update contact details
2. Either a **Work Phone** or **Home Phone** are required
 - o Phone number format must include the dashes (e.g., 555-555-1234)
3. All other fields are optional

Email Addresses

1. Select **Email Addresses** on the menu of the Profile page or scroll down once in your profile to review and update email addresses
2. At least one email address is required. In most cases, the user's work email is sourced from PeopleSync
3. Verify your email address by clicking the **Verify** hyperlink and following the prompts
 - a. This allows Concur to associate information (e.g., receipts) forwarded from the verified email address to your account

Emergency Contact

1. Select **Emergency Contact** to review and update emergency contact details
2. All fields are optional

Travel Preferences

1. Select **Traveler Preferences** on the menu of the Profile page or scroll down once in your profile to review and update travel preferences
2. Air Travel Preferences
3. Hotel Preferences
4. Car Rental Preferences

Frequent Traveler Program (air/rail, hotel, car)

1. Select **Add a Program**



2. Use the radio button to select if this is **Air/Rail Carrier, Car Rental Company or Hotel**
3. Select the appropriate vendor from the dropdown list
4. Enter the **Frequent Traveler, Driver or Guest Number**
5. Continue adding frequent traveler programs as needed
6. Click **Save**

Advance Program (used for Amtrak advantage program, if applicable)

1. Select **Add a Program**
2. Select **Air/Rail Carrier**
3. Select **Advantage Program**
4. Enter the **Advantage Program Number** and **Expiration Date**
5. Continue adding advantage programs as needed
6. Click **Save**

TSA Secure Flight details

1. Verify the **Gender** and **Date of Birth** fields
2. Complete **DHS Redress No** and **TSA Precheck Known Traveler Number**, if applicable

International Travel

1. Select **International Travel** on the menu of the Profile page or scroll down once in your profile to review and update passport and visa information
2. Click **Add a Passport**
3. Select **Passport Nationality**
4. Enter **Passport Number, Passport Date Issued, Passport Expiration, Passport Place Issued (City,State)**
5. Select **Passport Place Issued Country**
6. Click **Save**

Travel Arrangers

Travel arrangers are individuals who can book travel on your behalf. View the [Travel Arranger](#) tip sheet for more details on how to set up a travel arranger.



Credit Cards

Users must have a credit card saved in their profile in order to book travel using the online tool. The below steps can be used to enter your NYU BofA T&E card or if you want to save a personal credit card in your profile.

Note: For department travel cards (CTA cards), the CTA cardholder must enter the card number into another traveler's profile. Additional information can be found in the [CTA Cardholder Responsibilities](#) tip sheet.

1. Click **Add a Credit Card**
2. Enter **Display Name**
3. Enter **Your name as it appears on this card**
4. Select the **Card Type**
5. Enter the **Credit Card Number** and **Expiration Date**
6. Select what to **Use this card as the default for**
7. Enter the **Billing Address**
8. Click **Save**
9. To edit a saved credit card, click the **pencil icon** next to the desired card and make edits as needed

Updating Incorrect Profile Information

Depending on what information is incorrect, there are two ways to update your profile information.

- Data in the Name and Company Information section where the cell is grayed out and uneditable is coming into Travel and Expense from PeopleSync
 - a. Create a PeopleSync ticket to request updates to this information
 - b. *Note:* it may take 24 - 72 hours before data updated in PeopleSync is reflected in your profile. Also, you are **required to submit documentation** to support your name change request prior to it being actioned.
- Data in the remaining section where the cell is editable can be updated directly



- a. Click in the field directly or click the pencil icon to open the fields for edit
- b. Click **Save** when updates have been made

Related Resources

To learn more about using Travel and Expense, visit the [Training and Resources](#) page on the [Travel and Expense website](#).

Additional Support

Questions? Contact FinanceLink at AskFinanceLink@nyu.edu or 212-998-1111. For questions related to profile information sourced from PeopleSync, visit the [PeopleLink](#) support page.

