

## CONNEXUC AND AGGIETRAVEL

Profile Set-up and Management

This guide is an adaptation of the ConnexUC Traveler Profile Guide courtesy of the University of California, Office of the President's Central Travel Management team. This guide is intended for use by travelers and travel arrangers to view, update, and save travel profiles.





#### CONNEXUC TRAVELER PROFILE GETTING STARTED GUIDE FOR UC DAVIS TRAVELERS / ARRANGERS

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#### Introduction

This guide is intended for use by travelers and travel arrangers to set-up and manage travel profiles.

# IMPORTANT: Each traveler should complete their ConnexUC profile *prior* to completing their AggieTravel profile *and prior* to making travel reservations using AggieTravel.

ConnexUC profile information is saved and synchronized with contracted travel agencies and AggieTravel within a few minutes. All required fields in a profile section must be completed before the profile can be saved. **Note**: Sessions automatically end after thirty (30) minutes of inactivity. **Any unsaved changes will be lost.** 

#### **Access Travel Profile**

To access your ConnexUC profile, or the ConnexUC profile of someone who has designated you as a travel arranger, visit <u>https://aggietravel.ucdavis.edu</u>, go to the **Company Notes** section, and click **Read More** (as shown below):

#### COMPANY NOTES

Register your trip with UC Away If you didn't purchase airfare through AggieTravel, please click here to register your trip with UC Away.

UC Davis Non-Employee application Setup and maintain non-employee profiles for guests and students traveling or entertaining for official UC business.

Then, in the Helpful Links section, click on Travel Portal to access the ConnexUC Travel Portal.

#### Helpful links:

- Access the Travel Portal for additional program information
- · Access to tip sheets
- Click here to email an agent
- Click here to access the UC travel policy
- Learn more about State Funded Travel AB1887

Read more





Next: Click Edit Profile in the top navigation bar:



**Result:** The ConnexUC Traveler Profile page opens, displaying your profile.

#### Navigating within the ConnexUC Traveler Profile Page

All profile information is contained on one page and is divided into sections. Use the tabs at the top of the page to jump to a section. Remember to click **Save** on each tab after you enter information. If Save is clicked without completing all required fields, the page will display the fields that still need to be completed.

Important: Information is not saved until all fields in the error list are completed.

Once completed, profile information is synchronized to the travel agency(ies) (except SWABIZ).



To update a traveler's profile, select their name from the Manage Accounts section:

CONNE he University of Cali	fornia Travel Prog	<b>S</b> ram									UNIVERSITY OF CALIFORNIA
Personal	Business	Preferences	Payment	Loyalty	Documents						
Personal									My A ⇒ H	lome	
Fields marked w	ith an asterisk * a	re required.						Arrangers use this section to update a designated	Man	age Accounts	
Please enter you Prefix Fir	ir legal name exac st Name*	ctly as shown on your	valid passport, dri iddle Name	iver's license, o	r other ID allowed fo Last Name*	or travel.	Suffix	traveler's profile		•	
•		±.					-				
Date of Birth*	• •	-									
Redress Numbe What is this?	r	Known Traveler What is this?	Number								





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#### Personal

The Personal section contains fields for these subsections:

- Name (name must match government issued identification)
- Home Details
- Emergency Contact Details

Personal Busines	s Preferences	Payment	Loyalty	Documents			_	
Personal							My Accou	nt
ields marked with an asterisk *	are required.						⇒ Log Ou	t
Jame							Manage A	ccounts
lease enter your legal name ex	actly as shown on your valid	passport, driver's lic	ense, or other ID al	lowed for travel.			_	•
refix First Name*	Mid	dle Name		.ast Name*		Suffix		
ate of Birth*								
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#### **Business**

The Business section contains fields for the Business Details and Travel Arranger subsections.

#### **Business Details**

1. Complete the required fields.

Fields marked with an asterisk * are	required.				
Business Details					
Business Title					
Country*					
Company Name*		V			
Address*					
· · · · · · · · · · · · · · · · · · ·					
City*	State *		ZIP Code *		
Primary Phone Country*		Pri	mary Phone Number *	Ĕ	xtension
Mobile Dhone Country		• •	bile Dhone Number		
mobile Priorie Country		• • • • • • • • • • • • • • • • • • •			
Business Email*					
Traveler ID					
Travel Arranger					
Search arranger by last name or ema	il				
Traval Arcon		Can Donk	Can Assas	Dolete	
Travel Arranger		Can Book	Can Access	Delete	





#### Travel Arranger – Assigning a Travel Arranger

For a delegate to make travel reservations on behalf of another traveler, the traveler must add the delegate as a travel arranger inside their ConnexUC profile. Each traveler may assign up to four travel arrangers.

To enter information in the Travel Arranger subsection:

- 1. Search for a travel arranger by name or email address.
  - Type the first few letters of the travel arranger's last name or email address. A list of possible matches will appear.
  - Select the travel arranger's name from the list.

Travel Arranger									
Search arranger by last name or email									
Travel Arranger	Can Book	Can Access	Delete						
Employee Name (name@emailaddress.edu)		•	Ť						

- 2. Assign permissions:
  - If you want the arranger to book travel, select Can Book.
  - If you want the arranger to view and modify profile information, select Can Access.
- 3. Repeat to add more travel arrangers.





#### **Preferences Section**

The Preferences section contains fields for airline, hotel, and car rental preferences.

Note: The Remarks fields in the Preferences section are always optional.

Personal Business	Preferences	Payment	Loyalty	Documents		
Preferences		$\boldsymbol{\mathcal{C}}$				
Fields marked with an asterisk * are real	quired.	То	enter inf	ormation in	the Preferences s	ection:
Air Primary Airport*		En list	ter the ai of possil	rport code i ole matches	nto the Primary A will appear.	irport field
Secondary Airport	]	lf y fev	/ou do no w letters	ot know the of the city r	e airport code, ent ame or airport.	er the first
Special Service Request	Meal Type	Se	lect an ai	rport from t	he list.	
-	<b>T</b>	Co	omplete t	he rest of th	ne fields in the Air	, Hotel, and
Seat Preferences	•	Ca	r subsect	ions.		
Remarks						
Hotel						
Room Type						
Remarke						
Remarks						
Car						
Car Type						
Remarks						
					Sour Charges	
					Save Changes	





#### **Loyalty Section**

The Loyalty section contains fields for airline, hotel and car rental loyalty programs.

Personal	Business	Preferences	Payment	Loyalty	Documents
Lovalty					
Loyany					
Fields marked wit	th an asterisk * are	e required.			
Loyalty Mem	berships				
Type Airline ▼					
Vendor		Membership Nu	mber	Member	ship Level
Add					
Type \	/endor Me	mbership Number	Membership	p Level	

Save Changes

- 1. Select from the **Type**: Airline, Hotel, or Car.
- 2. Enter the vendor name, membership number and membership level in the available fields.

**Result:** The loyalty program, including your membership number, appears below the blue loyalty program indicator.

3. Repeat for all loyalty programs you wish to associate with your travel profile, up to 12 for each type of program.

Note: The name in the ConnexUC profile must match the name in the loyalty program in order to avoid errors during the booking process.





#### **Documents Section**

The Documents section contains fields for passport and visa information.

Passport Datails	Personal	Business	Preferences	Loyalty	Documents			
Enter passport number	Documents							
Select country of issue	Fields marked with an asterisk * are required.							
Enter place of issue	Passport D	etails						
Select nationality	Number		Country of Is	sue		Place of Issue		
Select issue & expiration dates	Nationality		Evoira	▼				
Click Add		•	T	T IIIIII	· · · · · · · · · · · · · · · · · · ·	•		
	Add							
Visa Details Enter visa number	Visa Details	S	Country of Is	sue				
Select country of issue	Valid From		Valid U	Jntil				
Select validity dates	Туре							
Enter visa type	Add							
Click Add	Add							

Repeat to add more visas for this passport.

#### Click Save

If you receive any error messages because of incomplete/improperly formatted information, update the fields and click Save.

#### NOTE: Information is NOT saved until all required fields are completed.

Upon successful completion, the submission confirmation screen appears.



Close the ConnexUC Traveler Profile window.





#### **Travel Arrangers**

This section describes tasks that travel arrangers can perform within ConnexUC. When a traveler assigns you as an arranger, he/she can give you permission to book travel and view/modify the traveler's profile information. You must log in to ConnexUC in order to perform those tasks.

You can be the arranger for multiple travelers; travelers can assign up to four arrangers.

#### Travel Arrangers – Accessing a Traveler's Profile

This section provides basic login information for travel arrangers. The method you use to log in will vary depending on your campus. To access the profile of someone who has designated you as an arranger, you first must log into the system using your own login credentials.

- 1. Log into the ConnexUC portal. See Access Travel Profile
- 2. for the instructions.

Result: Your ConnexUC profile page opens.

#### CONNEXUS UNIVERSITY OF CALIFORNIA Business Preferences Payment Loyalty Documents Personal My Account Personal Fields marked with an asterisk \* are required Arrangers use this section to update Name a designated traveler's profile Please enter your legal name exactly as shown on your valid passport, driver's license, or other ID allowed for travel. First Name\* Middle Nam Last Name Date of Birth dress Number Known Traveler Number What is this?

3. Select a name from the Select Traveler drop-down list.

**Result**: The traveler's profile appears, displaying options based on the permissions they granted you when assigning you as a travel arranger.

#### Travel Arrangers – Modifying a Traveler's Profile

This section describes how travel arrangers modify someone else's profile in ConnexUC.

- 1. Open the traveler's profile in ConnexUC.
- 2. Go to the section you wish to modify and make the changes.
- 3. Verify that the information you entered is correct and make any changes if necessary.





- 4. If you receive any error messages, update the information and click Save. Important: None of your information is saved until you revise all fields in the error list.
- 5. Close the ConnexUC Traveler Profile window.

#### Frequently Asked Questions

#### I am an assigned travel arranger, but when I log in, why are there no names in the dropdown list above the General section?

Confirm with the traveler that you are an assigned travel arranger, and that the traveler has given you permission to access their profile.

#### Why don't the changes I made to my profile appear on the ConnexUC site?

Did you click the Save button? If you did and the changes are not reflected in the site, you should contact <u>uctravel@ucop.edu</u> for assistance.

#### Why can't I make reservations in AggieTravel?

Your profile might not have fully synchronized with AggieTravel. If you just saved your profile, it will be a few minutes before synchronization is complete. If you have waited a number of minutes and still cannot use the Trip Search function, please contact <u>uctravel@ucop.edu</u> for assistance.

#### What if I don't know my airport preference code?

There is no Search button for the airport code. To find your airport code, go to the Preferences section and type the first few letters of the city or airport name into the Preferred Airport field. A list of possible matches appears. Select the airport from the list.