AGGIETRAVEL

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

Contents

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 https://aggietravel.ucdavis.edu , 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.

Read more

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

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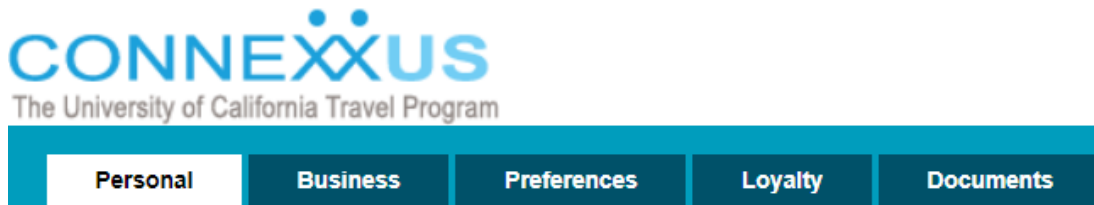
To update a traveler's profile, select their name from the Manage Accounts section:
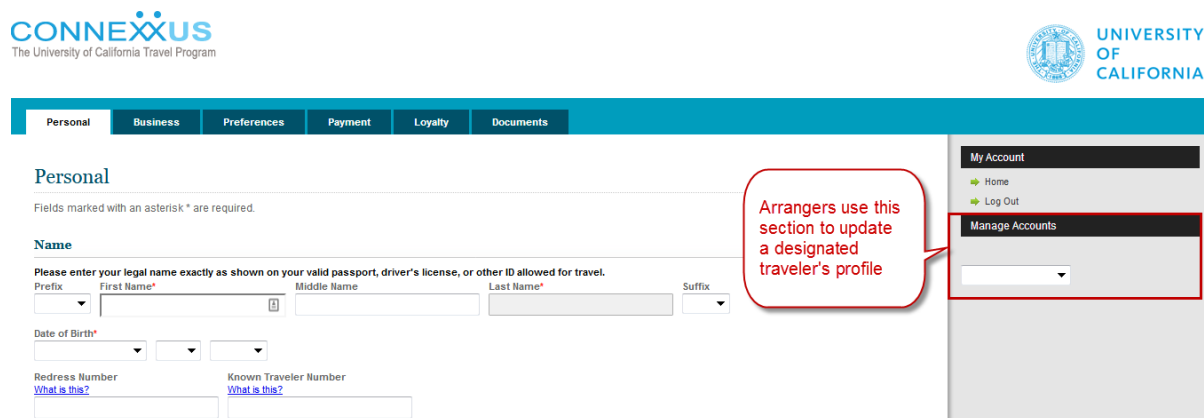
Personal

The Personal section contains fields for these subsections:

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

Business

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

Business Details

1. Complete the required fields.

Business

Fields marked with an asterisk * are required.

Business Details

Business Title

Country*

Company Name*

Address*

City*   State *   ZIP Code *

Primary Phone Country*   Primary Phone Number *   Extension

Mobile Phone Country   Mobile Phone Number

Business Email*

Traveler ID

Travel Arranger

Search arranger by last name or email

Travel Arranger	Can Book	Can Access	Delete

Save Changes

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)	☑	☑	🗑

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

Fields marked with an asterisk * are required.

Air

Primary Airport*

Secondary Airport

Special Service Request

Meal Type

Seat Preferences

Remarks

To enter information in the Preferences section:

Enter the airport code into the Primary Airport field. A list of possible matches will appear.

If you do not know the airport code, enter the first few letters of the city name or airport.

Select an airport from the list.

Complete the rest of the fields in the Air, Hotel, and Car subsections.

Hotel

Room Type

Remarks

Car

Car Type

Remarks

Save Changes

Loyalty Section

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

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.

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Where do you want to go?
CONNEX UC

Documents Section

The Documents section contains fields for passport and visa information.

Passport Details

Enter passport number

Select country of issue

Enter place of issue

Select nationality

Select issue & expiration dates

Click **Add**

Visa Details

Enter visa number

Select country of issue

Select validity dates

Enter visa type

Click **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.

Click **Log Out** at the top of the profile page.

Close the ConnexUC Traveler Profile window.

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Where do you want to go?
CONNEX·UC

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.

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 drop-down 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 uctravel@ucop.edu 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 uctravel@ucop.edu 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.