



UC Connexus Travel Profile Getting Started Guide for Travelers



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1 Introduction

The University of California (UC) has launched a new version of the Connexus travel program. There are three types of users for the new version of Connexus:

- Travelers
- Travel arrangers
- Administrators

This guide is intended for use by UC travelers and travel arrangers to view, update, and save travel profiles. There is a separate Getting Started Guide for administrators.

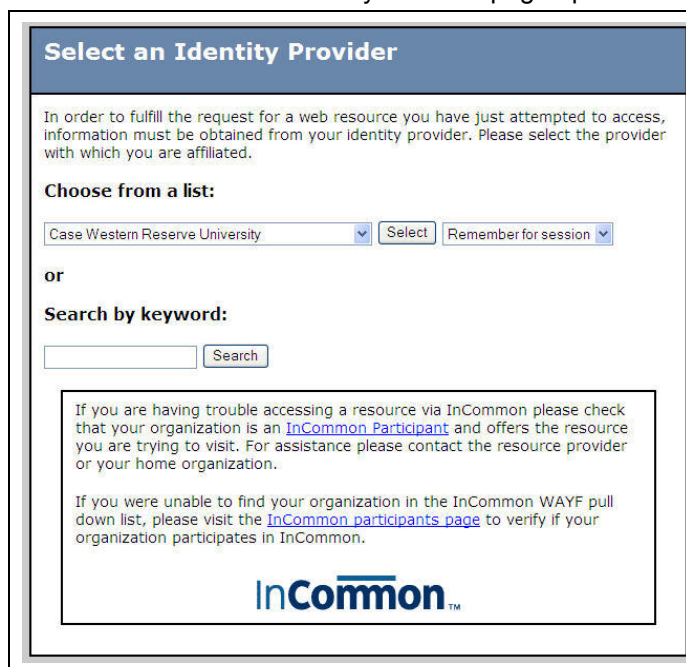
When you have finished entering information, click **Save**. Connexus saves your new/updated profile information, and synchronizes the information throughout the Connexus system and travel databases within a few minutes. If you have begun to enter information in a section, you must complete all required fields in that section before you can save your profile.

Note: After 30 minutes of inactivity, your session automatically ends and the system logs you out of Connexus. If you have made changes but did not click Save, your changes are lost when the system automatically logs you out.

2 Accessing a Travel Profile

This section provides basic login information. The method you use to log in will vary depending on your campus. To access your profile, or the profile of someone who has designated you as a travel arranger:

1. Launch the UC portal URL.
Result: The Select an Identity Provider page opens.



2. Use one of these methods to locate your campus:

Either

Use the drop-down list: Select your campus from the drop-down list, select a session option, and click **Select** next to the campus drop-down list.

Or

Search by keyword: Type a keyword and click **Search**. Select your campus from the search results and select a session option. Click **Select**.

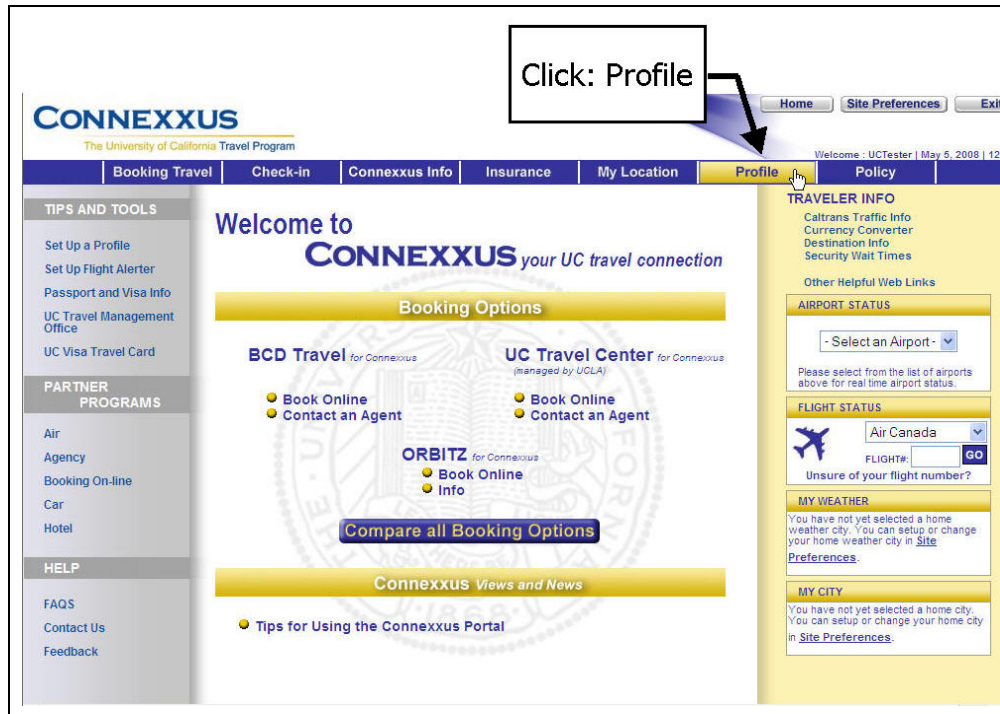
Result: The Login page for your campus opens. The following example shows the Login page for the UC Riverside campus. The Login page for your campus may vary.



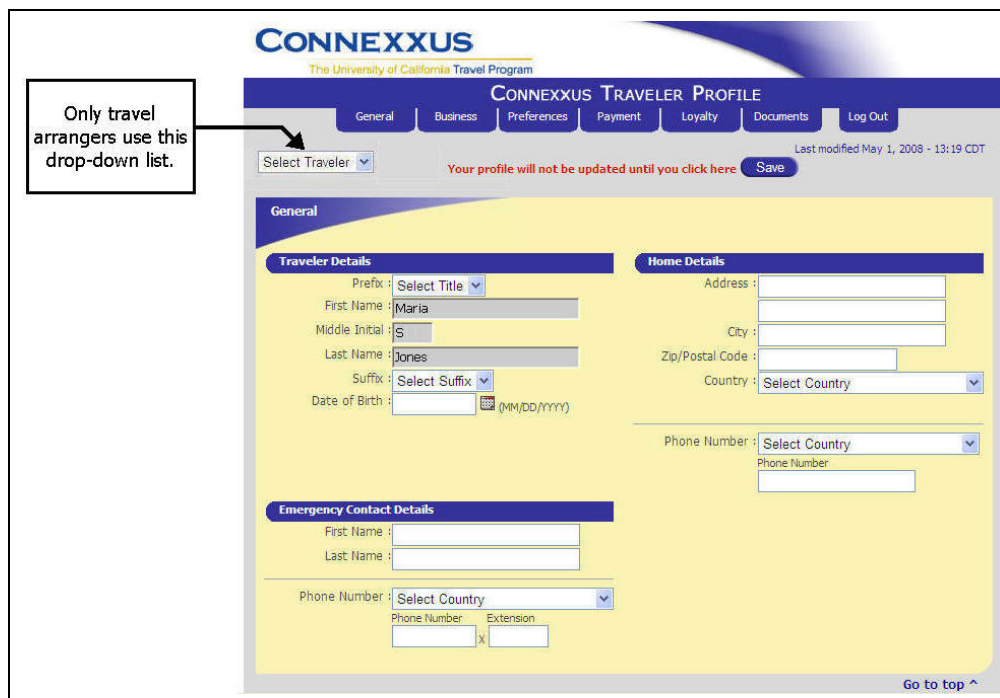
The screenshot shows the UC Riverside Central Authentication Services login page. At the top left is the University of California seal. The main header reads "UC RIVERSIDE UNIVERSITY OF CALIFORNIA Central Authentication Services". Below this, there is a message: "You have requested access to a site that requires authentication." To the right of this message are two input fields: "NetID:" and "Password:". Below the "Password:" field is a "Login" button. Underneath the input fields is a checkbox labeled "Warn me before logging in to each application." A prominent warning box in the center states: "FOR SECURITY REASONS, QUIT YOUR BROWSER WHEN YOU ARE DONE ACCESSING SERVICES THAT REQUIRE AUTHENTICATION". At the bottom, there is a security notice: "Make sure you know and trust any webpage or program that asks for your UCR NetID and Password. For more information about Web security, trusted applications, and future plans please visit <http://www.cnc.ucr.edu/websecurity>." The footer of the page includes the text "Computing & Communications".

3. Read the text on the Login page, select any options, and use your username/ID and password to log in.

Result: The system logs you in and the Connexus Welcome page opens.



4. Click the **Profile** link at the top of the Welcome page.
Result: The Connexus Traveler Profile page opens, displaying your profile.


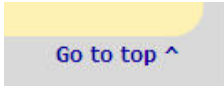



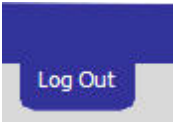


- To access the profile of someone who has designated you as a travel arranger, select a name from the Select Traveler drop-down list.

3 Navigating within the Connexus Traveler Profile Page

All profile information is contained on one page, which is divided into sections.

To navigate between sections, you can either scroll or use the tabs at the top of the page to jump to a section. Because there is only one page, you just have to click Save once to save information for all fields.

Action	How
Navigate between sections	<p>Either scroll to locate a section, or click a tab at the top of the profile page.</p> 
Jump to the top of the profile page	<p>Click the Go to Top link at the bottom of any section.</p> 
Edit profile information	<p>Click the edit button next to a field. </p> <p>You can only edit information when the edit button is present.</p>
Delete profile information	<p>Click the delete button next to a field. </p> <p>You can only delete information when the delete button is present.</p>
Save profile information	<p>Click the Save button at the top or bottom of the profile page. </p>
Log out	<p>Click the Log Out tab at the top right of the profile page. </p>

4 Required Information

Connexus has two types of required information:

- **Mandatory Fields:** These are fields that must contain information, such as for your address, city, state, zip code, country, business phone, and preferred airport. If these fields are blank, you will not be able to save/update your profile. Some of these fields appear when you select a related option. For example, the State field only appears when you select a country that has states. The Date of Birth field in the General section is only required when you add passport information to your profile.
- **Conditional Fields:** These are fields that must be completed only if you have entered information in other fields of the same section. For example, in the Payment section, if you select a card vendor from the drop-down list in the Company Card subsection, you must also enter your card number, expiration date and set the billing address. This applies to all fields that are not mandatory fields as described above.

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

If you click the Save button but have not completed all required information, Connexus displays a list of the fields that you must revise before you can save your profile.

Important: None of your information is saved until you revise all fields in the error list.

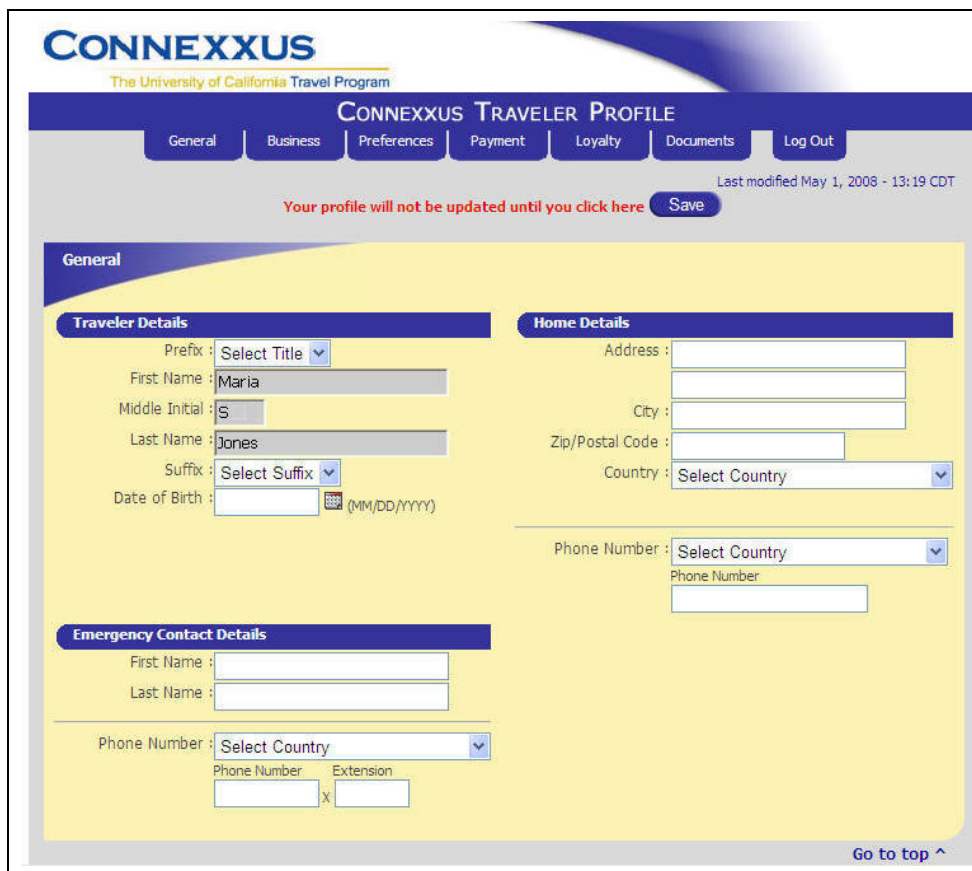
When you have finished entering information, click **Save**. Connexus saves your profile information and synchronizes the information throughout the Connexus system and travel databases within a few minutes.

5 General Profile

The General section contains fields for these subsections:

- Traveler Details
- Home Details
- Emergency Contact Details

Note: The fields in the General section might vary from what appears in the following image, based on the country you select. The Date of Birth field is optional unless you add passport information in the Documents section.



The screenshot shows the 'CONNEXXUS TRAVELER PROFILE' page. The 'General' tab is selected. A red warning message states: 'Your profile will not be updated until you click here' with a 'Save' button. The 'Last modified' date is May 1, 2008 - 13:19 CDT. The form is divided into three sections:

- Traveler Details:** Prefix (Select Title), First Name (Maria), Middle Initial (S), Last Name (Jones), Suffix (Select Suffix), Date of Birth (MM/DD/YYYY).
- Home Details:** Address, City, Zip/Postal Code, Country (Select Country), Phone Number (Select Country), Phone Number.
- Emergency Contact Details:** First Name, Last Name, Phone Number (Select Country), Phone Number, Extension.

A 'Go to top ^' link is located at the bottom right of the form area.

To enter information in the General section:

1. Complete the fields in the Traveler Details, Emergency Details, and Phone Details section.
2. Verify that the information you entered is correct and make any changes if necessary.

6 Business Profile

The Business section contains fields for these subsections:

- Business Details
- Travel Arranger

The fields in the Business section are based on the campus associated with your profile and might vary from what is shown in the following image.

The screenshot shows a web form titled "Business" with two main sections: "Business Details" and "Travel Arranger".

Business Details: Includes fields for Address (required), City, Zip/Postal Code, Country (dropdown), State (dropdown), Business Phone (required) with Phone Number and Extension sub-fields, Business Fax, Mobile Phone with Select Country dropdown and Area Code/Phone Number sub-fields, Email, Business Title, and Department. Asterisks indicate required fields.

Travel Arranger: Includes a table for listing arrangers with columns for "Travel Arranger's Name", "Can Book", and "Can Access". A note above the table says "Maximum 2 arrangers". Below the table is a search field labeled "Search Arranger by last name or email".

Callout Box: A box with an arrow pointing to the search field contains the following text: "There is no Search button. To locate an arranger: 1. Type the first few letters in the person's last name or email address into the field. A list of possible matches appears. 2. Select an arranger from the list."

At the bottom right of the form is a "Go to top ^" link.

6.1 Business Details Subsection

To enter information in the Business Details subsection:

1. Complete the address fields.
2. Complete the business phone fields.
3. Verify that the information you entered is correct and make any changes if necessary.

6.2 Travel Arranger Subsection – Assigning a Travel Arranger

Assigning a travel arranger is optional. If you assign a travel arranger, you can then choose options that give travel arrangers permission to book travel for you and have access to view/modify your travel profile information. You can assign one or two travel arrangers.

To enter information in the Travel Arranger subsection:

1. Search for a travel arranger by name or email address.

Note: There is no Search button.

 - a. Type the first few letters of the person's last name or email address.

Result: A list of possible matches appears.
 - b. Select the person's name from the list.

Result: The person's name appears in the Travel Arranger's Name field next to two checkboxes where you can assign permissions.

Note: You can either assign permissions to the travel arranger now, or come back at some future time to perform this task. We recommend that you assign permissions now.
2. Assign permissions:
 - If you want the arranger to book your travel, select **Can Book**.
 - If you want the arranger to view and modify your travel profile information, select **Can Access**.
3. Repeat to add a second travel arranger.
4. Verify that the information you entered is correct and make any changes if necessary.

7 Preferences Profile

The Preferences section contains fields for these subsections:

- Air Preferences
- Hotel Preferences
- Car Preferences

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

To enter information in the Preferences section:

1. Type a three-letter code into the Preferred Airport field.

Note: There is no Search button. If you do not know the airport code:

- a. Type the first few letters of the city name or airport. A list of possible matches appears.
- b. Select an airport from the list.
2. Complete the rest of the fields in the Air Preferences, Hotel Preferences, and Car Preferences subsections.
3. Verify that the information you entered is correct and make any changes if necessary.

8 Payment Profile

The Payment section contains fields for these subsections:

- Company Card
- Personal Card

The screenshot shows the 'Payment' section of the UC Connexus Travel Profile. It is divided into two main subsections: 'Company Card' and 'Personal Card'. Each subsection contains the following fields:

- Card Vendor:** A dropdown menu with the text 'Select Type'.
- Card Number:** A text input field.
- Expiration Date:** Two dropdown menus, both with the text 'Select'.
- Select Usage:** Three checkboxes labeled 'Air', 'Hotel', and 'Car'.
- Set Billing Address as:** Two radio buttons labeled 'Home' and 'Business'. The 'Business' radio button is selected.

A 'Go to top ^' link is located at the bottom right of the form area.

To enter information into the Payment section:

1. Complete the fields in the Company Card and Personal Card subsections.
2. Select usage options for **Air**, **Hotel**, and **Car**.
3. Select billing address options.
4. Verify that the information you entered is correct and make any changes if necessary.

9 Loyalty Profile

The Loyalty section contains fields for these subsections:

- Airline Loyalty Programs
- Hotel Loyalty Programs
- Car Loyalty Programs

To enter information in the Loyalty section:

1. Select an option from the Type drop-down list: **Airline**, **Hotel**, or **Car**.
Result: Connexus populates the Loyalty Program Name drop-down list based on the program type you selected.
2. Select a program from the Loyalty Program Name drop-down list.
3. Complete the Membership Number field and click **Add**.
Result: The loyalty program, including your membership number, appears below the blue loyalty program indicator.
4. Verify that the information you entered is correct and make any changes if necessary.
5. Repeat for all loyalty programs you wish to associate with your travel profile, up to 12 for each type of program.

10 Documents Profile

The Documents section contains fields for these subsections:

- Primary Passport Information
- Secondary Passport Information
- Visa Information

The screenshot shows a web form titled "Documents" with three main subsections:

- Primary Passport Information:** Includes fields for Citizenship (Select Country), Nationality (Select Country), Passport Number, Expiration Date (calendar), Country of Issue (Select Country), Issue Date (calendar), and Issue Location.
- Secondary Passport Information:** Includes fields for Citizenship (Select Country), Nationality (Select Country), Passport Number, Expiration Date (calendar), Country of Issue (Select Country), Issue Date (calendar), and Issue Location.
- Visa Information:** Includes fields for Passport (Select Passport), Visa Issuance Country (Select Country), Visa Number, Expiration Date (calendar), and Visa Type. An "Add" button is located below these fields.

Below the Visa Information section, there is a table with the following structure:

Visa Issuance Country	Visa Number	Visa Type

At the bottom of the form, there is a "Go to top ^" link and a "Save" button. A red message states: "Your profile will not be updated until you click here".

To enter information in the Documents section:

1. In the Primary Passport Information subsection, select your country of citizenship from the drop-down list.
2. Select your nationality from the drop-down list.
3. Complete the remaining fields in the Primary Passport Information subsection. **Important:** When using the calendar feature to select issue and expiration dates, be sure to select the correct year.
4. In the Visa Information subsection, select primary or secondary passport from the Passport drop-down list.

5. Select the country from the Visa Issuance Country drop-down list.
6. Complete the remaining fields in the Visa Information subsection. **Important:** When using the calendar feature to select issue and expiration dates, be sure to select the correct year.
7. Verify that the information you entered is correct and make any changes if necessary.
8. Click **Add**.
Result: The visa information appears at the bottom of the Visa Information subsection.
9. Repeat to add more visas for this passport.
Note: At the time this guide was written, each profile could have a maximum of four visas. If you try to add a fifth visa, you receive an error message.
10. To enter visa information for a second passport, complete the fields in the Secondary Passport Information subsection, and enter visa information for the passport, if any.
11. Verify that the information you entered is correct and make any changes if necessary.
12. Click **Add**.
13. Repeat to add more visas for this passport.
14. Go to the General section at the top of the profile page and verify it contains your date of birth. If your date of birth does not appear, you must add it now or you will not be able to save your travel profile information.
15. Click **Save**.
16. If you receive any error messages because of incomplete/improperly formatted information, update the fields and click **Save**.
Important: None of your information is saved until you revise all fields in the error list.
17. Click the **Log Out** tab at the top of the profile page.
18. Close the Connexus Traveler Profile window.

11 Travel Arrangers

This section describes tasks that travel arrangers can perform within Connexus. 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 Connexus in order to perform those tasks.

You can be the arranger for multiple travelers; travelers can only assign one or two arrangers.

11.1 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 login to the system using your own login credentials.

1. Login to the UC portal and navigate to Connexus. See [Accessing a Travel Profile](#) on page 3 for the instructions.

Result: Your Connexus profile page opens.

2. 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.

11.2 Travel Arrangers – Modifying a Traveler’s Profile

This section describes how travel arrangers modify someone else’s profile in Connexus.

1. Open the traveler’s profile in Connexus.
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 Connexus Traveler Profile window.

12 FAQ

This section contains answers to frequently asked questions.

Q. 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?

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

Q. Why don’t the changes I made to my profile appear on the Connexus site?

A. Did you click the Save button? If you clicked Save and the changes are not reflected in the site, you should contact your travel provider for assistance.

Q. Why can’t I log in to the online booking tool?

A. Your profile might not have fully synchronized with the online booking tool. 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 log in to the booking tool, please contact your travel provider for assistance.

Q. What if I don’t know my airport preference code?

A. 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.