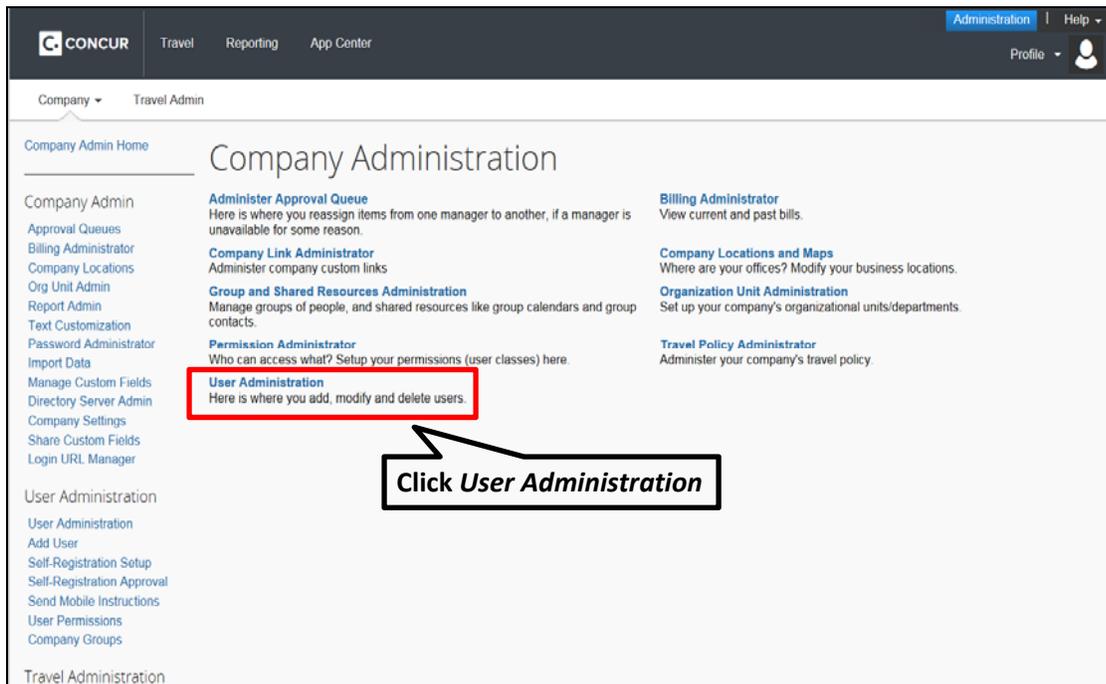
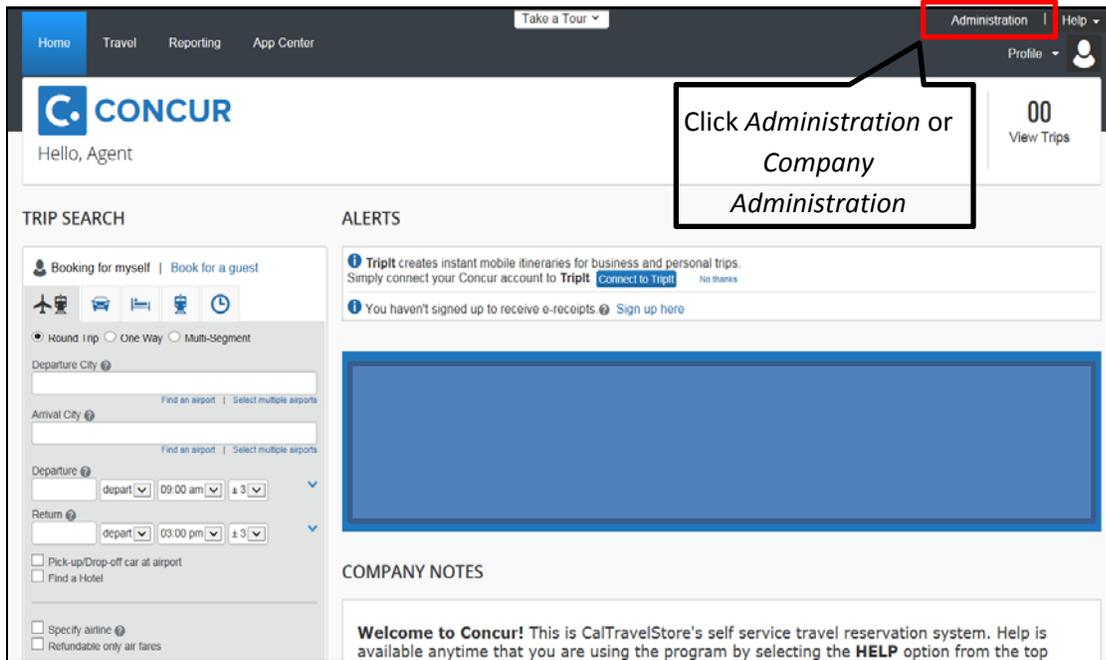


Introduction

This user guide is intended to assist the travel administrator(s) manage the users/travelers for CalTravelStore's online booking tool, Concur Travel.

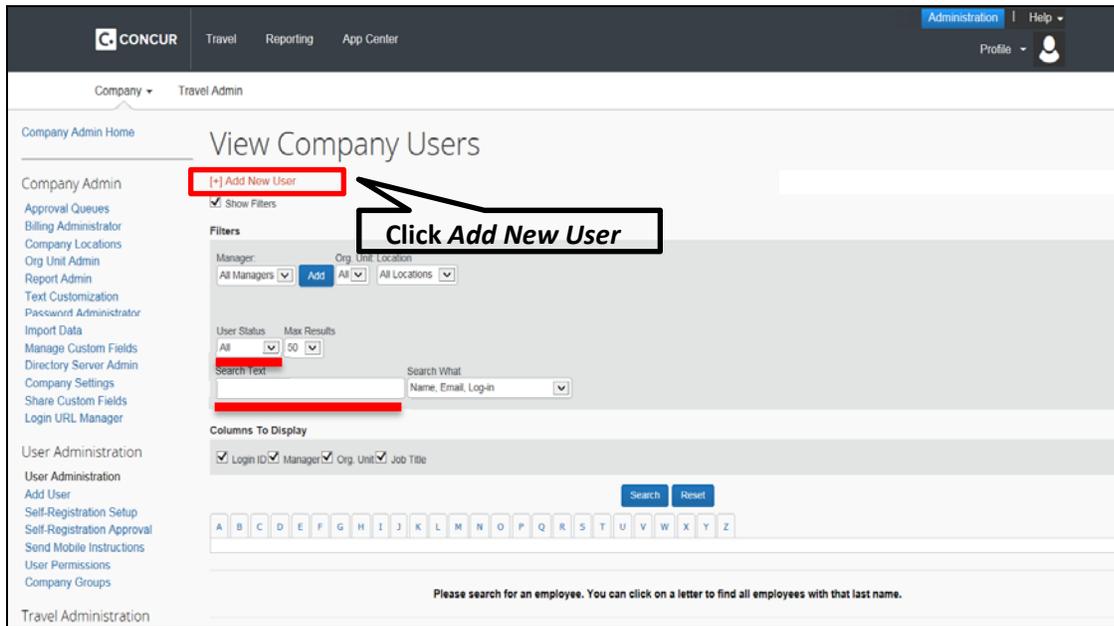
Creating/Adding a New User

All users of the online booking tool may only have one profile. Duplicate profiles will cause errors in the booking process.

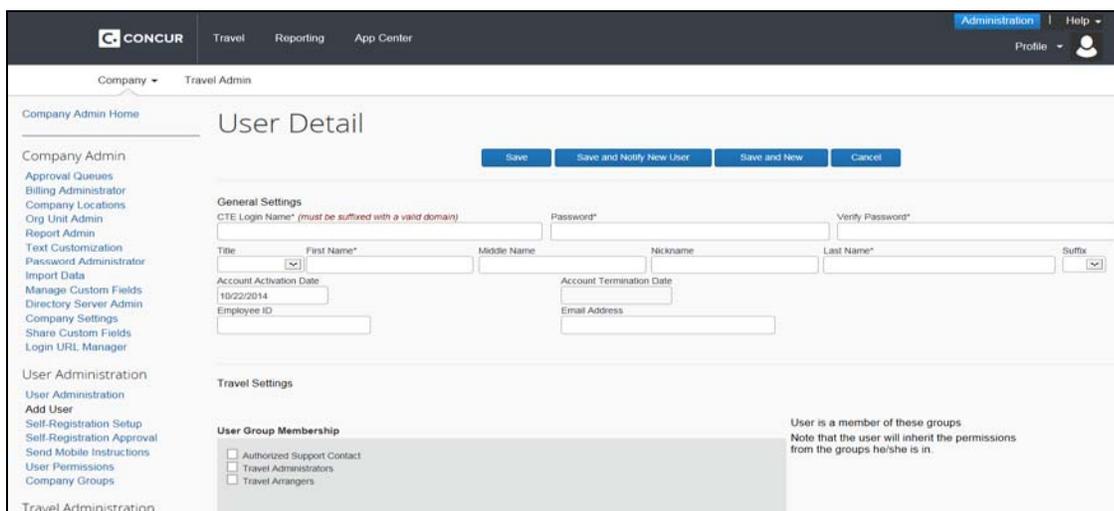


Important Tip to *avoid creating a duplicate user profile:*

- Enter the users last name in the Search Text box, be sure to select 'All' under the User Status, Click Search
- Look for the users name on the listing below
- If the name does not appear – Add the new user
- If the name does appear, check the status of the user by clicking on their name
 - o If active, **do not** create a new user profile. Provide them with their login and password information (you need to reset their password to a default *i.e. changeme1*)
 - o If deactivated, contact DGS Statewide Travel Program at (916) 376-3974
- Select 'Add new User'.



- Enter the required information to add a new user as shown below:
 - o **CTE Login Name** (must contain the '@' symbol and is usually the user's email address).
 - o Enter the user's temporary **Password** and then verify it in the **Verify Password** field (the password can be changed at any time after the first login).
 - o Enter the appropriate information in the user's **First Name**, **Middle Name**, and **Last Name** fields (must be the user's legal name, and will be printed on any tickets they purchase through the system).
 - o Enter the user's email address in the **Email Address** field. **NOTE:** If you do not want the user/traveler to receive any email confirmations/traveler itineraries, enter in the travel arranger's email address here.



- Once you have entered the required information, you can click **Save** or **Save and Notify New User**.
 - 'Save' will save the profile. The traveler will not receive any email notification that a profile has been established for them. The traveler will not have access to Concur unless the temporary password has been provided to him/her.
 - 'Save and Notify New User' will send the traveler an email notification alerting them that a profile has been created, with a link to reset their password and access to log into Concur. Below is an example of the 'Save and Notify New User' function.

Save **Save and Notify New User** **Save and New** **Cancel**

Email Parameters

If you click **Save and Notify New User**, the information below is what Concur will use in the email sent to the user. Change any of the default information as needed before you click **Save and Notify New User**.

From: it@travelstore.com Subject: Concur Account Information

Message Text

Dear [FIRSTNAME] [LASTNAME],

Welcome to Concur! Your Login ID is [LOGIN]. You can access the site and change your password using the following link:

[LOGINURL]

After you change your password the link will immediately expire. (It will also expire after one week).

Legend:

- Login ID = [LOGIN]
- First Name = [FIRSTNAME]
- Last Name = [LASTNAME]
- Login URL = [LOGINURL]

- Anytime a traveler needs to change or update their password, they can do so by clicking on **Profile Settings**, and then **Change Password**.

CONCUR | Travel | Reporting | App Center | Administration | Help

Profile | Personal Information | Change Password | System Settings | Mobile Registration | Travel Vacation Reassignment

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Other Settings

- E-Receipt Activation
- System Settings
- Connected Apps
- Concur Connect
- Change Password
- Privacy Statement
- Travel Vacation Reassignment
- Mobile Registration
- I'm Assisting...

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.
- Mobile Registration**
Set up access to Concur on your mobile device.
- System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**
How can we contact you about your travel arrangements?
- Setup Travel Assistants**
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Preferences**
Carrier, Hotel, Rental Car and other travel-related preferences.
- Change Password**
Change your password.

Click Change Password

Before you use Concur to book travel for the first time, update your profile and/or your traveler's profile. You must save your profile and enter in all of the required fields before you first attempt to book a trip.

If you have additional questions about adding users to Concur or creating Concur profiles, please contact the DGS Statewide Travel Program main line at (916) 376-3974 or CalTravelStore at (877) 454-8785.