

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

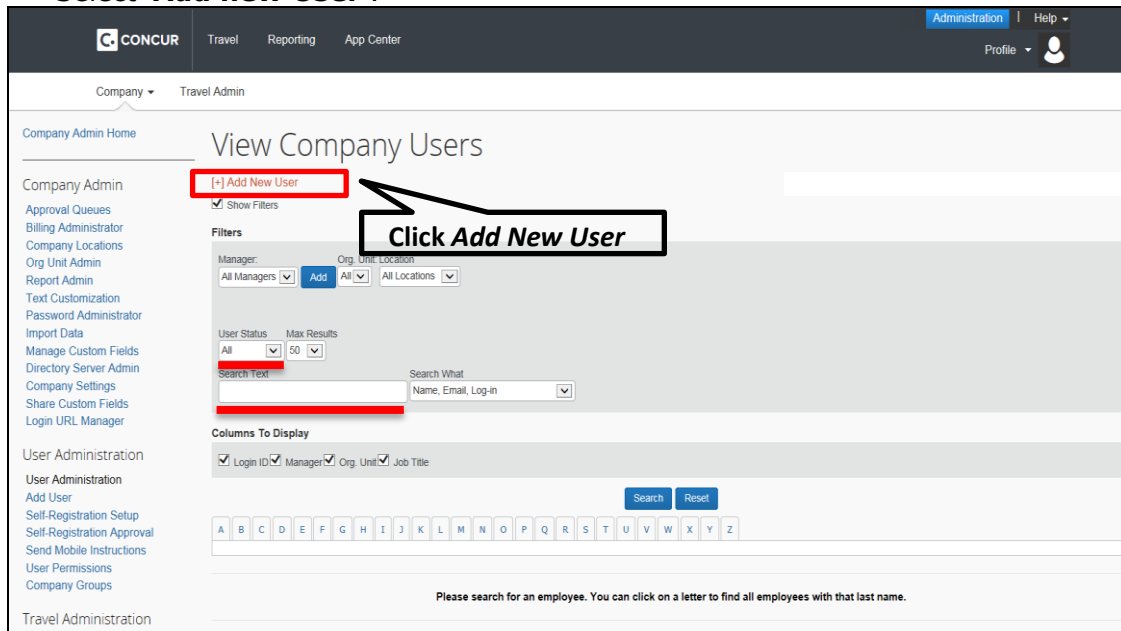
All users of the online booking tool may only have one profile. Duplicate profiles will cause errors in the booking process.

The screenshot shows the Concur user interface. In the top right corner, the 'Administration' menu is highlighted with a red box. A callout box with a black border and white background points to this menu, containing the text: "Click Administration or Company Administration". The main content area includes a 'TRIP SEARCH' section with various filters and a 'COMPANY NOTES' section with a welcome message.

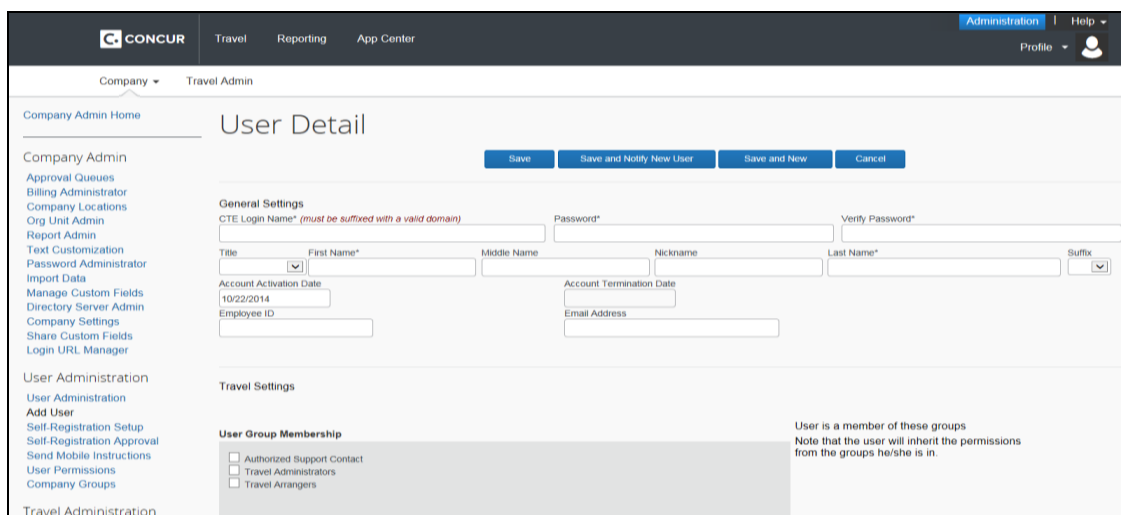
The screenshot shows the 'Company Administration' page. In the left sidebar, the 'User Administration' link is highlighted with a red box. A callout box with a black border and white background points to this link, containing the text: "Click User Administration". The main content area lists various administrative tasks such as 'Administer Approval Queue', 'Billing Administrator', 'Company Link Administrator', 'Group and Shared Resources Administration', 'Permission Administrator', and 'Travel Policy Administrator'.

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.

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).

Preview:

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
 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.