Welcome to the Concur Travel Training Series sponsored by the Department of General Services Statewide Travel Program.

Today's Concur Travel training session will teach you How to Set Up Your Concur Profile.

Before we begin, please note that each entity's travel policies may differ slightly;

We recommend that you refer to your entity's travel coordinator for guidance and direction, if necessary.

Also, the Concur Travel website for this series is used for training purposes only.

Your entity's website may look slightly different because it is customized to meet your entity's travel policies.

We begin by going to the Concur Travel login site which is located at www.caltravelstore.com.

Click on the Concur login.

Prior steps you must take to set up your access to the Concur login screen include receiving the registration link from your department travel coordinator, and submitting the registration request.

Once completed, you will be able to log in to Concur with your work email address and password.

This ensures that your profile and login are unique to your department.

Once you are logged in, click on Profile in the upper-right hand corner.

If you are a travel arranger and want to edit the profile of someone other than yourself, select a name from the drop list or enter the name of the traveler.

Otherwise, click on Profile Settings to continue to your own profile.

Start by selecting one of the following profile options to customize your profile.

We will start with Personal Information.

Keep in mind that there are only a few required fields, but you may make your profile as thorough or as limited as you would like.

Disabled fields in gray cannot be changed. If there are errors in these fields, please contact the DGS Statewide Travel Program at 916 376-3974.

For the Personal Information field, your first, middle and last name must be your legal name and be identical to the official photo identification that you will be presenting at the airport, such as a driver's license or passport.

If you do not have a middle name on your identification or driver's license, check the "no middle name" button.

Proceed down the page, filling in the information.

The Company Information box, is optional, unless you are required to input any billing or accounting codes.

Your work address and home address are also optional fields.

There are several Save buttons on the profile page, however, you only need to save once as every save button saves the entire profile.

The next section is the Contact Information field. When entering your contact information it is necessary to enter AT LEAST your work phone number or your home phone number.

You may enter both, or you may substitute your cell phone number for your home number.

Your work email address (the one used as your login) will automatically populate in the email address field.

You have the option of being able to add more email addresses.

You can have your itinerary be sent to your manager or your personal email address.

If you have a primary travel arranger assigned in your profile, they will automatically receive a copy of your itinerary.

The Emergency Contact field is not a required field, but it is recommended. On the offside chance there is an emergency, we would like to know who to contact on your behalf.

The next section is Travel Preferences. You may select any discount programs you belong to. But be prepared to show the proper membership cards.

If you choose a rate with an AAA discount, you will need to show your AAA membership card at the counter.

The government discount refers to federal government rates; Concur automatically searches for the state government rates.

Next, you can select your seat preference, your seat section, your meal preference (if offered by the airline), and your preferred departure airport.

Entering your preferred departure airport into your profile ensures it will automatically populate when searching for tickets.

You will also be able to alter this in the search screen without returning to your profile.

This section also gives you a chance to notify the airline of any medical restrictions you may have.

Then you can select your hotel preferences- room type, amenities, and accessibility needs. Your hotel preferences will be highlighted in the hotel search results.

Next are the car rental preferences.

If your entity follows the State of California travel policy, please keep in mind that compact and intermediate are still the preferred car rental classes, and the State Controller's Office will not reimburse GPS systems.

The next section allows you to add your frequent traveler programs. The State of California follows federal guidelines allowing travelers to retain frequent traveler benefits for personal use.

These programs will automatically attach your frequent air, car and hotel rewards to any reservations made.

Please ensure your name on your rewards program matches the legal name you've stored in the Concur profile.

Click on the Add a Program button on the right. Select the plane, car or hotel bed icons.

Select the appropriate vendor from the drop-down menu, insert your reward number, and click Save.

You can enter 5 traveler reward programs at a time. Click on the Add a Program link again to add additional reward numbers.

The next section is for Southwest Ticket Credits. If you have any pending Southwest ticket credits from before you created your Concur profile, you can enter them by clicking on Add ticket credit.

Any credits accrued for trips booked and cancelled through Concur will be automatically stored in the system.

Next, your gender and date of birth are required information for the TSA, and if you have a TSA Pre Check known traveler number, you can enter it here.

If you should choose to participate in this TSA Pre Check program, please note it is a non-reimbursable expense.

If you do any international travel, there is an area for you to manage your passport and VISA. Adding your passport information to your profile will allow us to include it in your reservations.

The next section is the Assistants and Travel Arrangers section. If there is someone within your department that you want to give permission to book travel for you, click on the Add an Assistant button on the right.

Your assistant must have an existing Concur account before you can add him or her to your profile. Once you click on the Add an Assistant button, a pop-up box will display.

Input the travel assistant's last name or email address to search for them. Select the appropriate name from the drop-down list. Make sure you select at least one of the two options provided: can book travel for me" and/or is my primary assistant for travel.

You can have as many assistants as you would like to be able to book travel for you; but you can only have one primary assistant. Then click the Save button.

The last and final section of the profile is the Credit Cards. For hotel reservations in Concur, you will need to load a personal credit card to reserve and guarantee a hotel room. The airfare, car rental, and rail will be billed to your department.

You can enter the credit card by selecting Add a Credit Card in the right hand corner. The credit card is entirely secured, with the number immediately encrypted upon entry.

Once you enter the credit card number, your information will not be available to any Concur, CalTravelStore, or Statewide Travel Program employees.

If at any time you wish to make changes to your profile, login back into the profile, use the options on the left side of the screen to make the changes and save immediately without scrolling down to the bottom of the page.

And that completes the profile set up session. We hope this session will assist you in setting up your Concur profile.