

# Completing a Concur Profile

STATEWIDE TRAVEL PROGRAM



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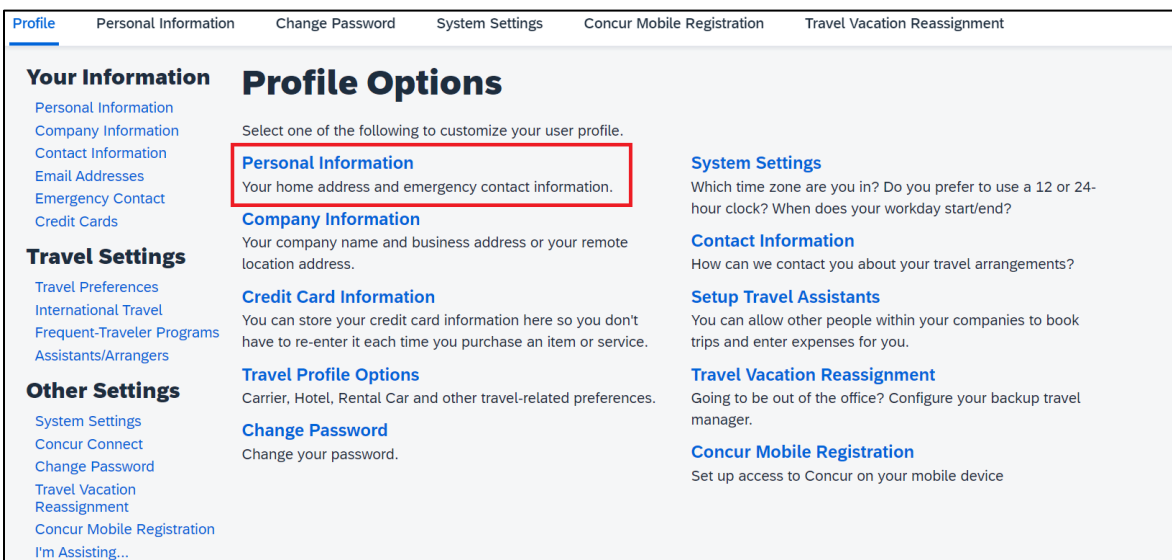
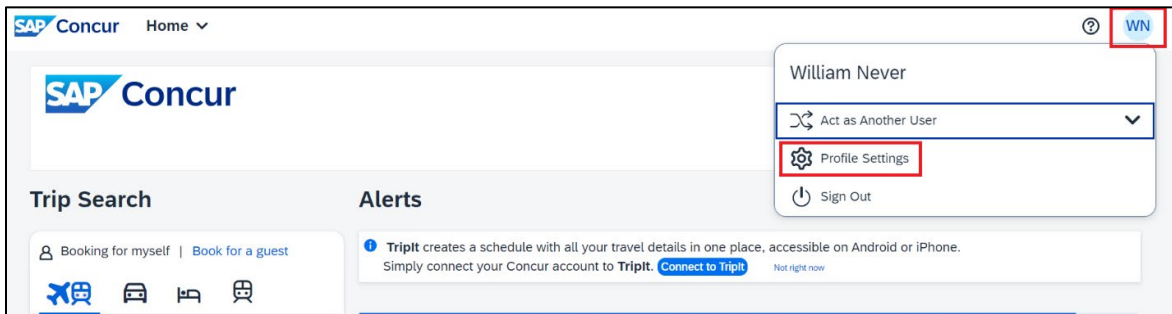
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# Completing a Concur Profile

Before you can complete your Concur profile, you will need to request an account from your agency's travel coordinator. If you do not know who your agency's travel coordinator is, email [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov). Once you have successfully registered for an account, log in using your username and password. You will be prompted to enter an authentication code to sign in. If you have not set up two-factor authentication (2FA), or you require assistance with resetting 2FA, please refer to the Concur 2FA User Guide.

## 1.1 Profile Settings

Once you are successfully logged in, you will see a light-blue icon with your initials in the upper right-hand corner. Click on the icon with your initials in the top right of the screen to view the drop-down menu, then select **“Profile Settings.”** This will bring you to a page titled **“Profile Options.”** Then select **“Personal Information”** to get started.



## 1.2 Required/Blocked Fields

There are only a few required fields within the profile, but you may make your profile as thorough or as limited as you would like. Keep in mind that you must complete the required fields in the profile to be able to book a trip in Concur. Any section that is grayed out cannot be edited by you and must be corrected by your travel coordinator.

## 1.3 Profile Fields – Contact Information

### 1.3.1 Legal Name

The first section of the profile is your legal name. Your name must be **exactly the same** as it is on your photo identification that you will present at the airport. This information is prefilled by the travel coordinator when they register you for Concur. The name cannot be edited by you. If you notice any errors, please contact your travel coordinator to fix this before making any reservations.

**Important Note**  
**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
<input type="text"/>	<input type="text" value="William"/>	<input type="text" value="STP"/>	<input type="text"/>	<input type="text" value="Never"/>	<input type="text"/>

### 1.3.2 Company Information

The next section is “Company Information.” This may or may not be a required field for your agency.

**Company Information** [Go to top](#)

Employee ID

Manager  Org. Unit/Division  Employee Position/Title

### 1.3.3 Address

In the “Work Address” section, enter the physical address of the agency for which you work. The “Home Address” section is optional.

**Work Address** [Go to top](#)

Company Name  Assigned Location

Street   Address same as assigned location

City  State/Province

Postal Code  Country/Region

### 1.3.4 Contact Information

In the “Contact Information” section, you are required to enter at least your work phone number. Entering your mobile phone number is optional, but recommended in the event a travel agent may need to reach you. A home phone number is not required.

Contact Information				Go to top
Work Phone <b>[Required**]</b>	Work Extension	Work Fax	2nd Work Phone/Remote Office	
9165555555				
Home Phone <b>[Required**]</b>				
9165555555				
Pager	Other Phone			
Mobile Phone Country/Region	Mobile Phone			
<b>**You must specify either a home phone or a work phone.</b>				

### 1.3.5 Email Addresses

In the “Email Addresses” section, your work email address will automatically be populated. You have the option of being able to add additional email addresses. If you are a travel arranger and booking travel for someone, you will automatically receive a copy of the traveler's itinerary.

Email Addresses				Go to top
Please add at least one email address.				
<a href="#">How do I add an email address?</a>				
<a href="#">+ Add an email address</a>				
Email Address	Verify	Contact?	Actions	
Email 1 @dgs.ca.gov		Yes		

### 1.3.6 Emergency Contact

The “Emergency Contact” section is optional; however, it is recommended that you have this section completed in case of an emergency.

Emergency Contact				Go to top
Name	Relationship			
Street	<input checked="" type="checkbox"/> Address same as employee			
City	State/Province	Postal Code		
Country/Region	Phone	Alternate Phone		

# 1.4 Travel Preferences

The "Travel Preferences" section is optional. This section allows you to customize your profile to make it easier to book reservations. In this section, you can add information for: discount travel rates, air travel preferences, hotel preferences, car rental preferences, and any frequent traveler or loyalty programs of which you are a member. Please note that when selecting any discount programs, you will be required to show the proper identification/membership card. If you choose a rate with an AARP discount, you will be required to show an AARP membership card at the counter. The government discount travel rate refers to federal government rates; otherwise, Concur automatically searches for state lodging rates.

**Travel Preferences** [Go to top](#)

**Eligible for the following discount travel rates/fare classes**

AAA/CAA  Government  Military  Senior/AARP

**Air Travel Preferences**

Seat:  Seat Section:  Special Meals:  Ticket Delivery:

Preferred Departure Airport:  Other Air Travel Preferences:  Medical Alerts:

**Hotel Preferences**

Room Type:  Smoking Preference:   Foam pillows  Rollaway bed  Crib

**I prefer hotel that has:**

a gym  a pool  a restaurant  room service  Early Check-in

**Accessibility Needs**

Wheelchair access  Blind accessible

**Car Rental Preferences**

Car Type:  Smoking Preference:  Car Transmission:   In-car GPS system  Ski rack

Message to Car Rental Vendor:

**Frequent-Traveler Programs**

Your Frequent Traveler, Driver, and Hotel Guest Programs [Add a Program](#)

No programs defined

**Advantage Programs**

Your Advantage Programs for Travel Discounts [Add a Program](#)

No programs defined

# 1.5 Unused Tickets

The next section is “Unused Tickets.” You will not see anything listed here unless you have unused airline ticket credits. Contact your travel coordinator if you have questions about unused airline ticket credits.

Carrier	Ticket Number	Credit	Expiration Date	Notes
Southwest	██████████	USD234.19	09/13/2024	.

# 1.6 Transportation Security Administration Secure Flight/Passports

## 1.6.1 TSA Secure Flight

The next section is “TSA Secure Flight.” Your gender and date of birth are required by the U.S. Transportation Security Administration (TSA). If you have a TSA PreCheck Known Traveler Number, you can enter it in this section. If you choose to participate in the TSA PreCheck program, please note it is a nonreimbursable expense.

**TSA Secure Flight**

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV)

Gender **[Required]**  Male  Female    Date of Birth (mm/dd/yyyy) **[Required]**     DHS Redress No.     TSA Pre✓ Known Traveler Number

## 1.6.2 International Travel: Passports and Visas

The “International Travel: Passports and Visas” section allows you to enter details for your passport and applicable visas for international travel. Adding your passport information to your profile will allow the travel agency to include it in your international travel reservations. The completion of this field is helpful for users who expect to book international travel, but it is optional for all users.



**International Travel: Passports and Visas** Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier. The completion of this field is helpful for users who expect to book international travel but is optional for all users.

**Passports** + Add a Passport

I do not have a passport

**International Visas** + Add a Visa

## 1.7 Assistants and Travel Arrangers

The next section is “Assistants and Travel Arrangers.” Here you can add any active Concur user from your agency to book or manage travel on your behalf. Select “**Add an Assistant**” and type the person’s name. Whomever you choose to be your travel arranger/assistant must have a Concur profile before you can search for and select them. You can have as many travel assistants/arrangers as you would like, but only one of them can be labeled as the “Primary Assistant.”

**Assistants and Travel Arrangers** Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers + Add an Assistant


Assistant	Can book travel?	Update/Delete
██████████	Can book travel? <span style="color: green;">✔</span>	
██████████	Can book travel? <span style="color: green;">✔</span>	
██████████	Can book travel? <span style="color: green;">✔</span>	

## 1.8 Credit Cards

The last section of the profile is “Credit Cards.” Air, rail and rental car reservations are directly billed to your agency’s travel account. A personal credit card is required to hold and reserve any hotel room unless your agency participates in the state’s virtual card program. Reach out to your travel coordinator if you do not know whether your agency participates in the virtual card program.

**Credit Cards** [Go to top](#)

You currently have the following credit cards saved with your profile. [+ Add a Credit Card](#)

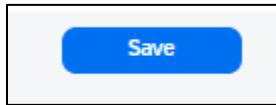
Card Type	E-Receipt Enabled	Display Name	Sponsored Card	Credit Card Number	Expiration Date	Default	Update/Delete
		Fake Visa		***9175	Exp: 11/2025		<a href="#">✎</a> <a href="#">🗑️</a>

[Save](#)

Once entered, your credit card information is completely encrypted and will not be visible to anyone.

## 1.9 Saving Your Profile

Once you have completed your entire profile, you can select any of the blue “**Save**” buttons. You do not need to save after each section, as each button saves the entire profile.



You can make changes to the editable fields in your profile at any time.

## Resources

For additional information or assistance with completing the Concur profile, please contact your agency's travel coordinator. If you do not know who your travel coordinator is, please email [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov).