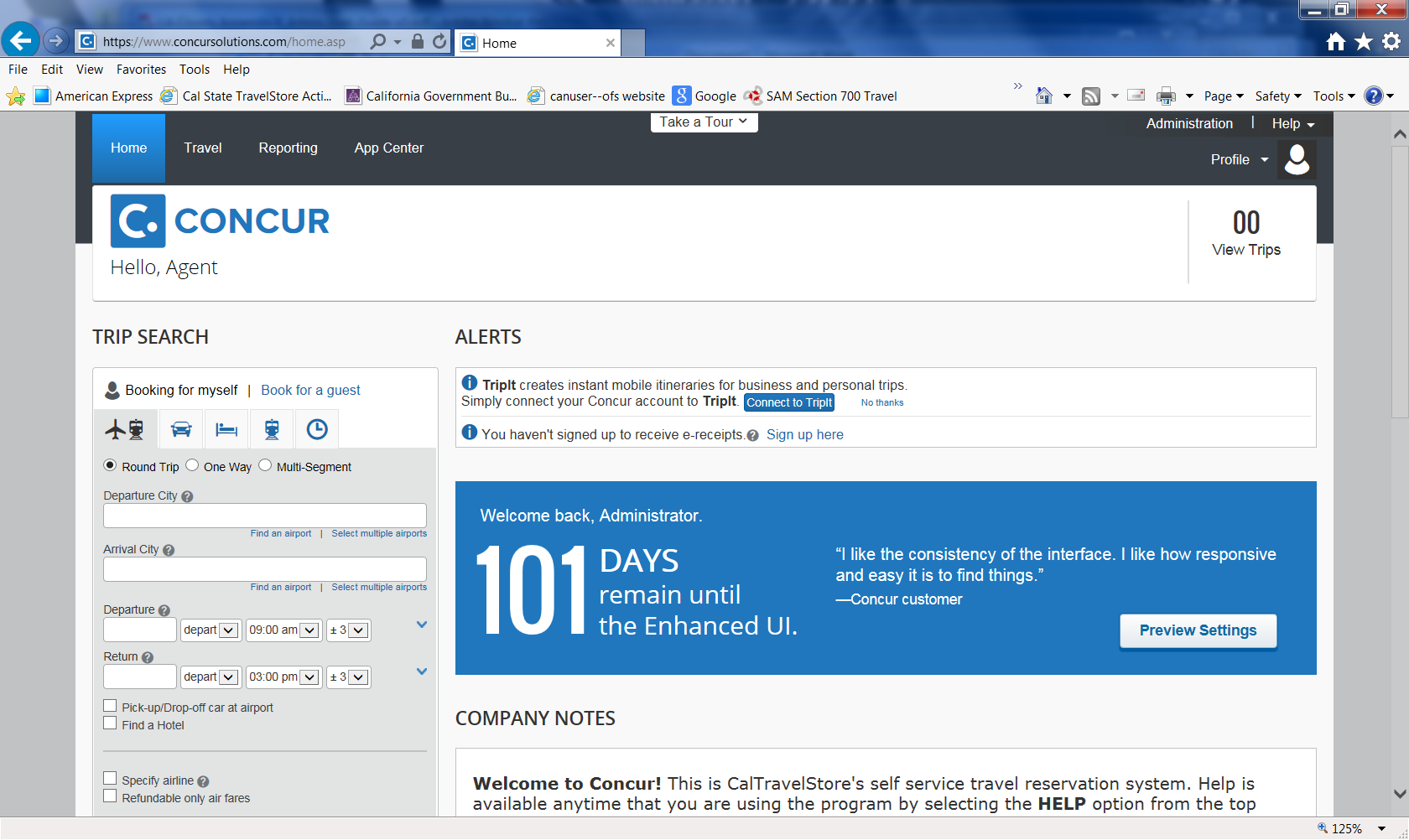
**Introduction**

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

* How to Create/Add a New User in Concur (Pages 1-4)
* How to Delete a User in Concur (Page 4)

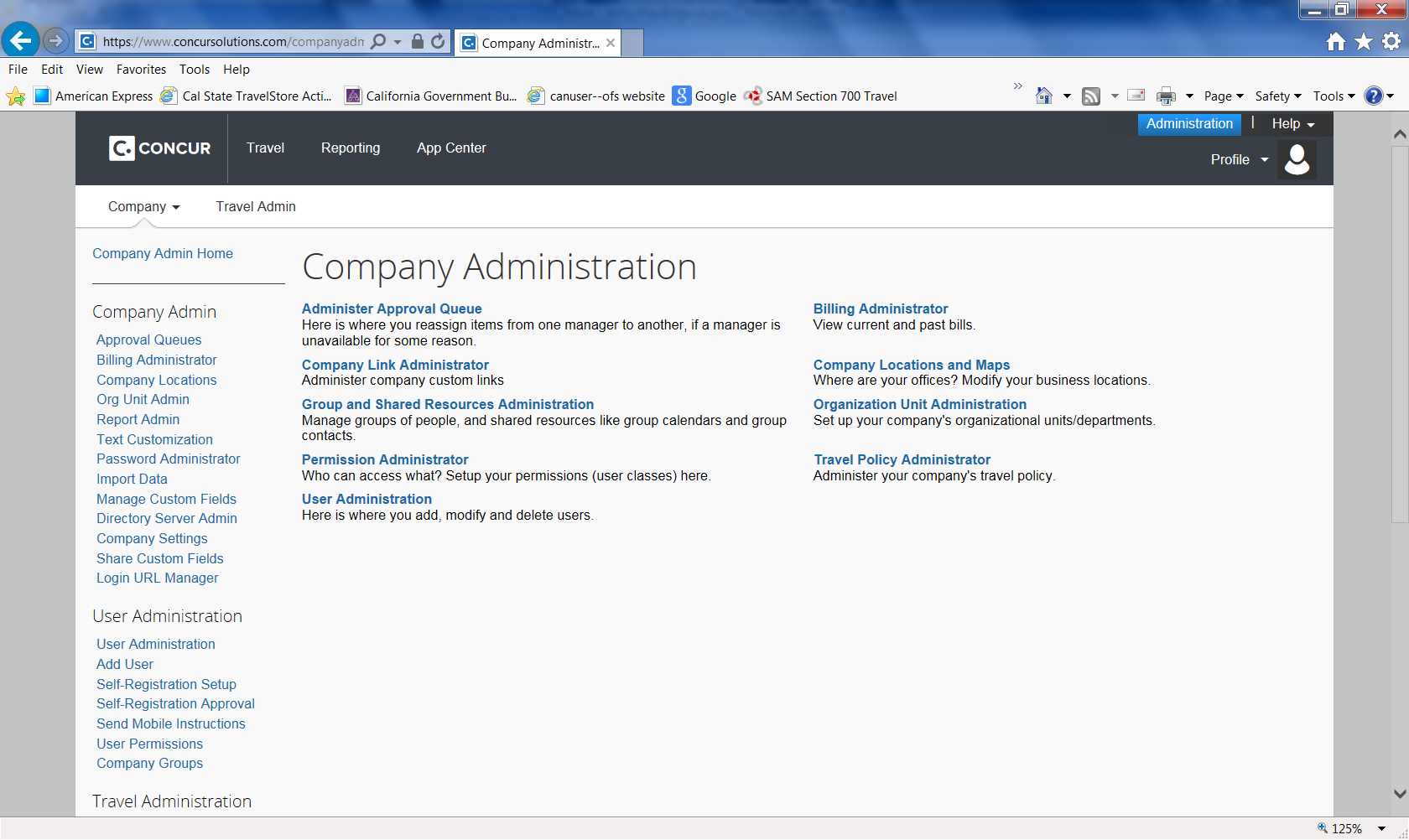
**How to Create/Add a New User in Concur**

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



Cl

Click *Administration* or *Company* *Administration*



**Click *User Administration***

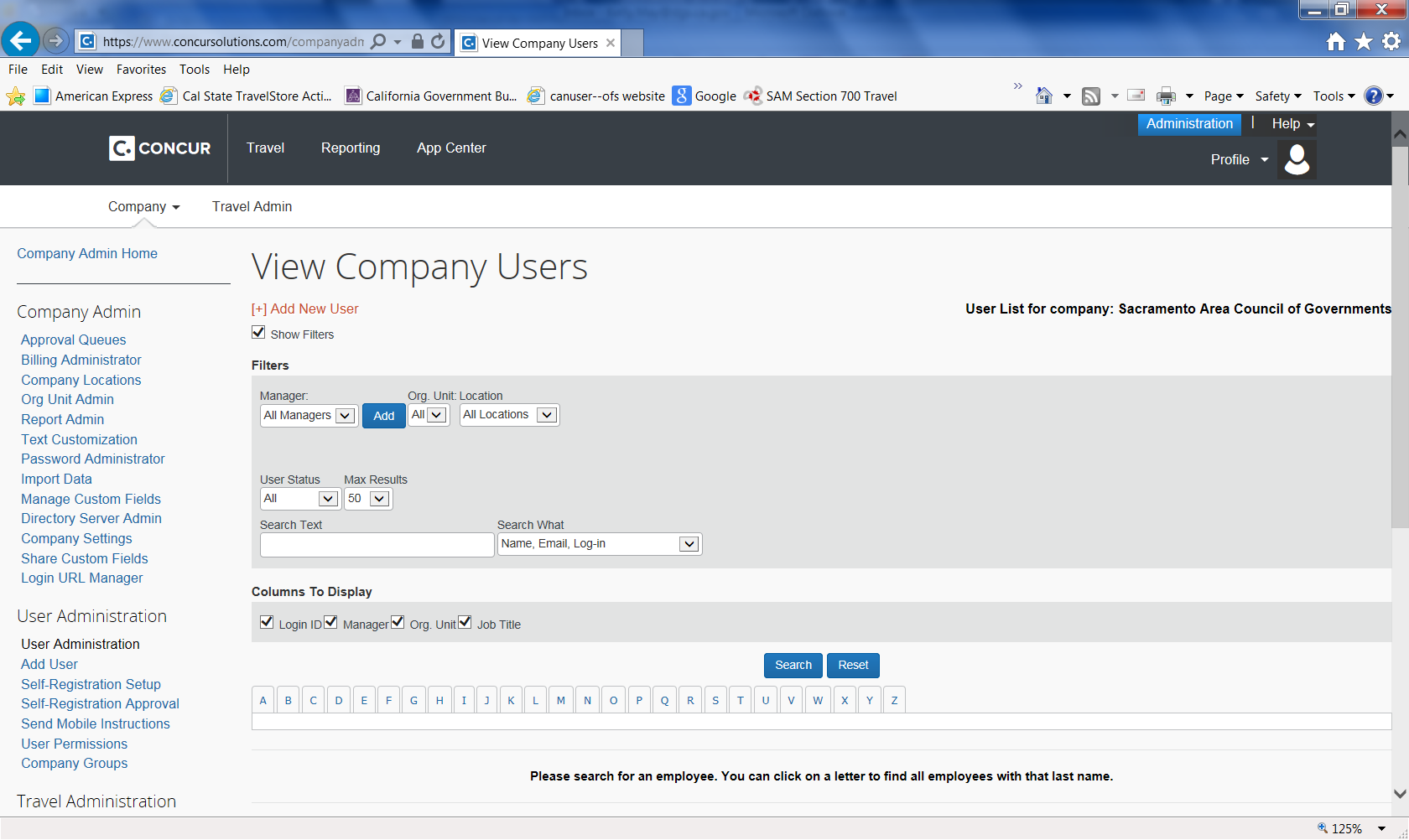
**Important Tip** to ***avoid creating a duplicate user profile***:

* 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*)

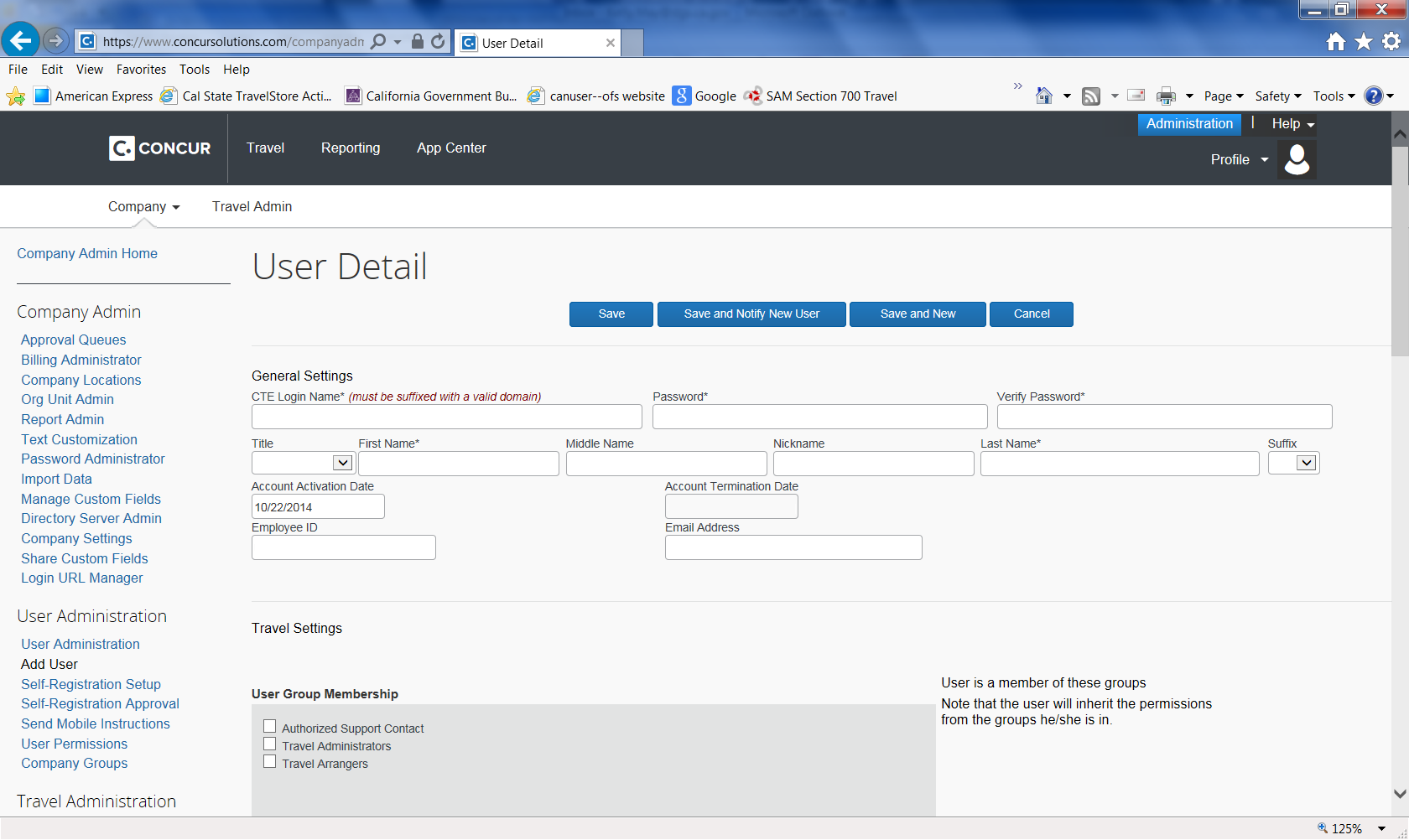
o If deactivated, contact DGS Statewide Travel Program at (916) 376-3974

* Select ‘**Add new User’**.

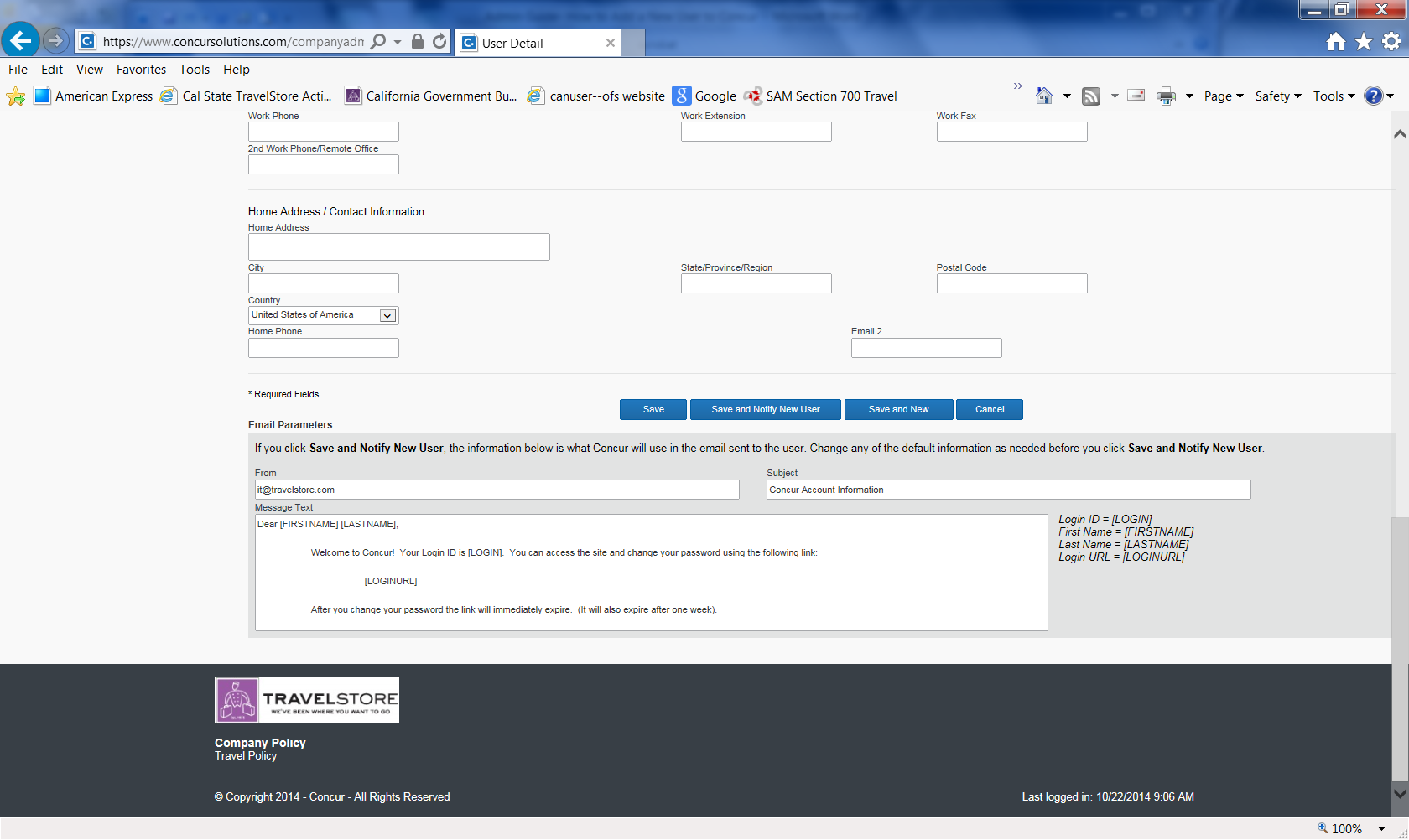


**Click *Add New User***

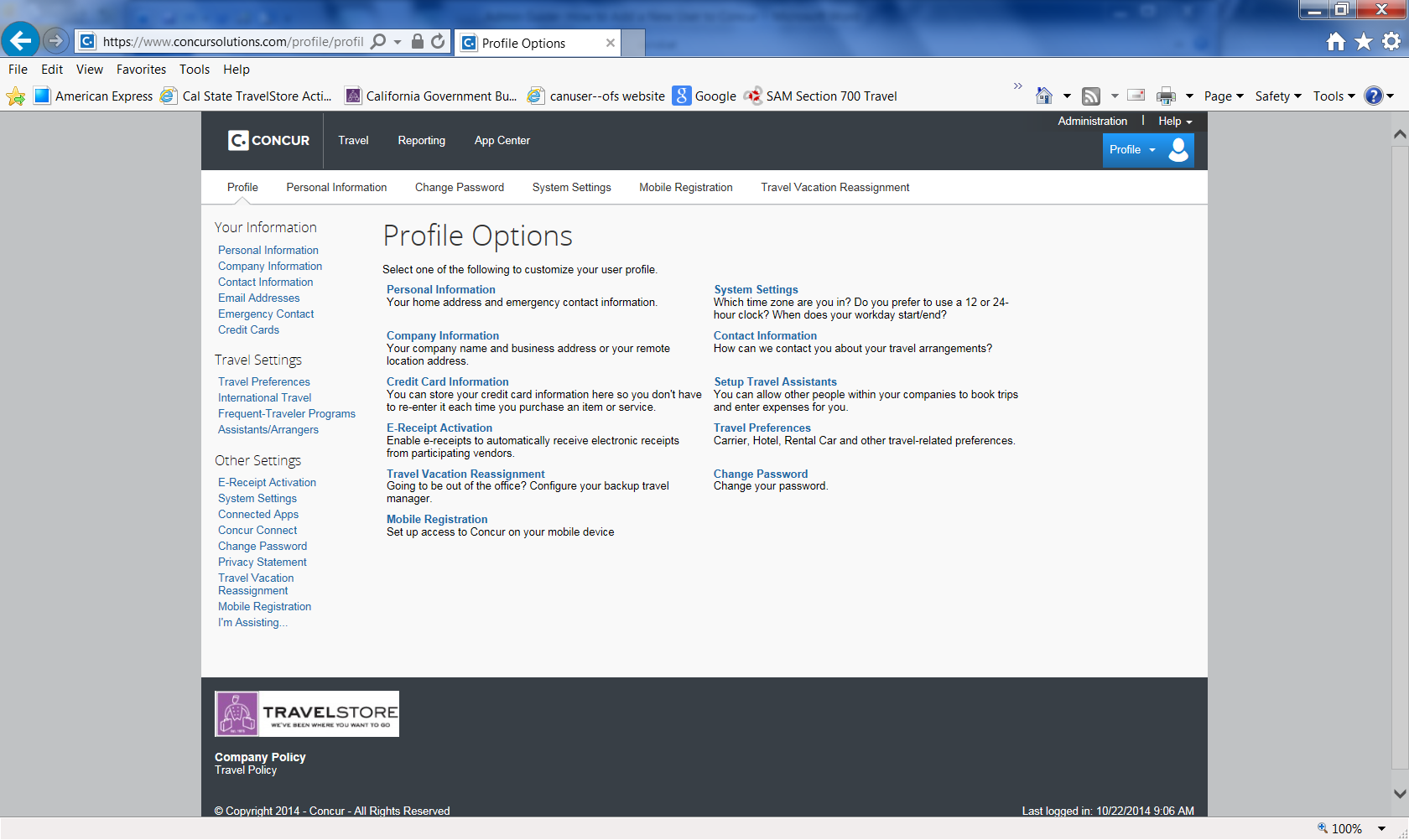
* Enter the required information to add a new user as shown below:
  + **CTE Login Name** (must contain the ‘@’ symbol and is usually the user’s email address).
  + Enter the user’s temporary **Password** and then verify it in the **Verify Password** field (the password can be changed at any time after the first login).
  + 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).
  + 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.



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

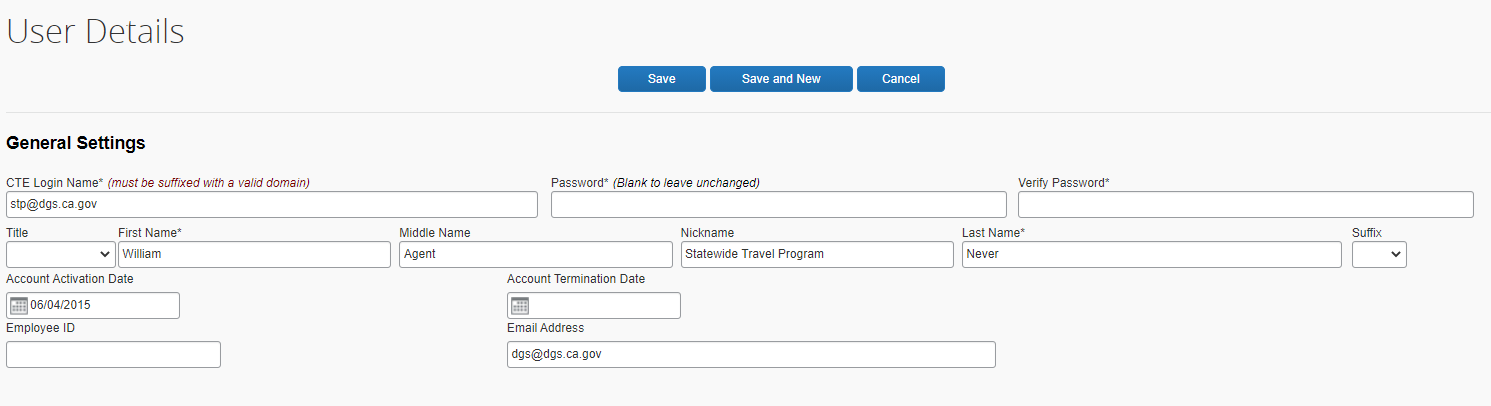


**Click *Change Password***

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.

**How to Delete a User in Concur**

* Select **User Administration**. On the User Administration screen, search for the employee that needs to be deactivated.
* When the employee record is returned, click the employee’s name (it will be a hyperlink).
* In the **CTE Login Name** field, add *.del* or *.old* after the login name. This allows the proper login name to be used on another Concur site, if needed.
* In the **Account** **Termination Date** field, click the calendar icon.
* Use the calendar to select the date you want to the profile to be deactivated.
* Click **Save**.



**Select the date you want the profile to be deactivated**

If you have additional questions about adding users to Concur or creating Concur profiles, please contact the DGS Statewide Travel Program main line at [statewidetravelprogram@dgs.ca.gov](mailto:statewidetravelprogram@dgs.ca.gov) or CalTravelStore at (877) 454-8785.