

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

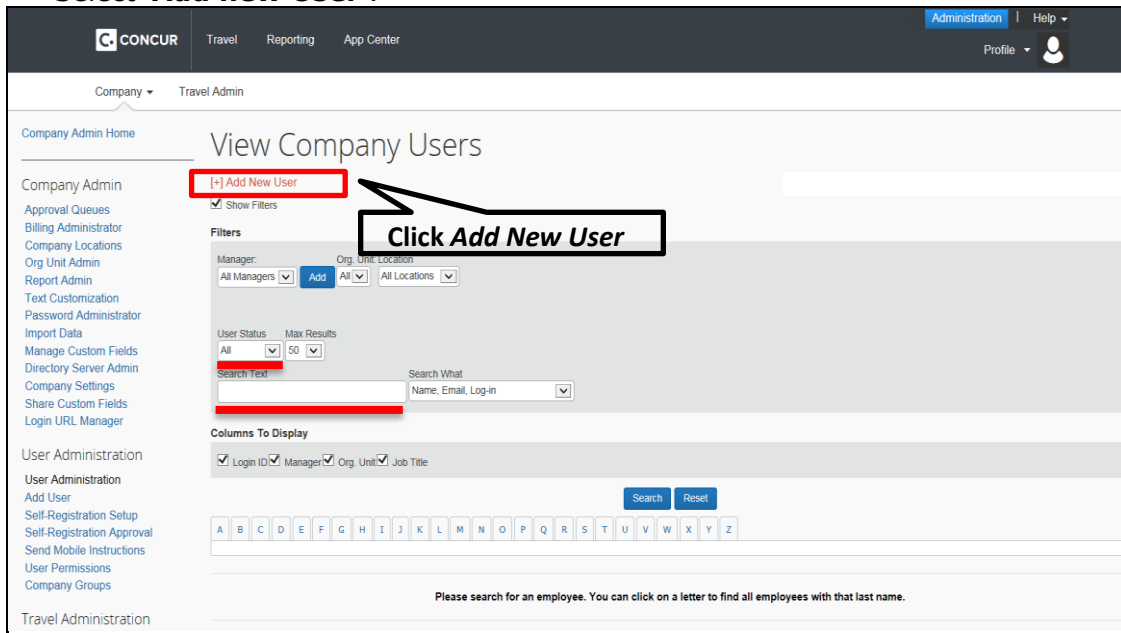
All users of the online booking tool may only have one profile. Duplicate profiles will cause errors in the booking process.

The screenshot shows the Concur home page. The top navigation bar includes 'Home', 'Travel', 'Reporting', and 'App Center'. On the right, there is a 'Take a Tour' button, an 'Administration' menu (highlighted with a red box), and a 'Help' menu. Below the navigation bar, the Concur logo is displayed along with 'Hello, Agent'. A callout box points to the 'Administration' menu with the text 'Click Administration or Company Administration'. The main content area is divided into 'TRIP SEARCH' and 'ALERTS'. The 'TRIP SEARCH' section includes options for 'Booking for myself' or 'Book for a guest', travel mode selection (Round Trip, One Way, Multi-Segment), and fields for 'Departure City', 'Arrival City', 'Departure', and 'Return'. The 'ALERTS' section contains two messages: one about connecting to TripIt and another about signing up for e-receipts. Below the alerts is a 'COMPANY NOTES' section with a welcome message and a 'HELP' option.

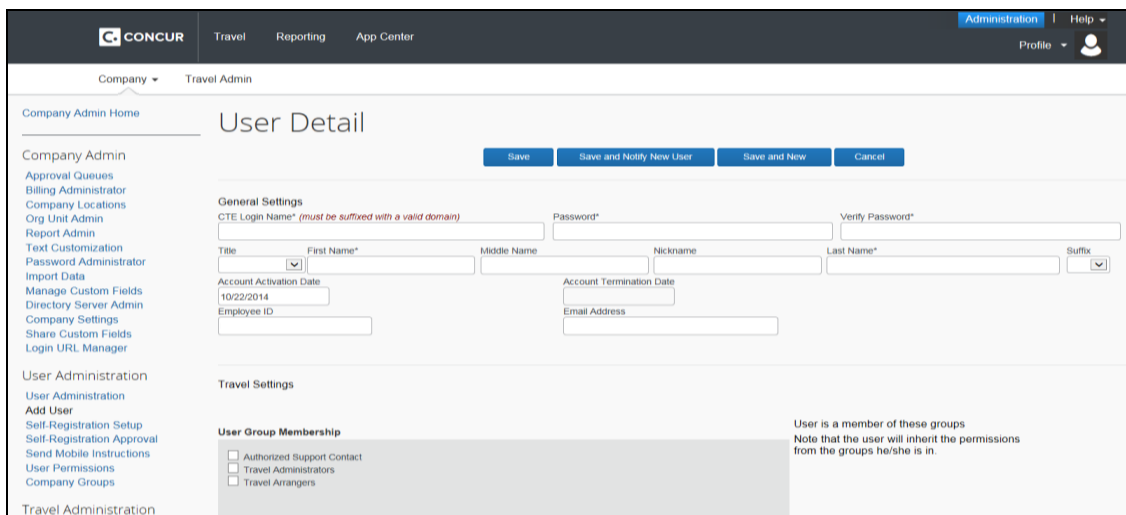
The screenshot shows the 'Company Administration' page. The top navigation bar includes 'CONCUR', 'Travel', 'Reporting', and 'App Center'. On the right, there is an 'Administration' menu (highlighted with a blue box) and a 'Help' menu. Below the navigation bar, the 'Company Admin Home' is displayed. The main content area is titled 'Company Administration' and contains several administrative links: 'Administer Approval Queue', 'Billing Administrator', 'Company Link Administrator', 'Group and Shared Resources Administration', 'Permission Administrator', 'User Administration' (highlighted with a red box), 'Travel Policy Administrator', 'Company Locations and Maps', and 'Organization Unit Administration'. A callout box points to the 'User Administration' link with the text 'Click User Administration'. The left sidebar lists various administrative tasks under 'Company Administration' and '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'.



- 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).

Variables:

- 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

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.