

# How to Change a User's Concur Profile

Statewide Travel Program

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# 1. Instructions for Travelers

As a traveler, you can make changes to your Concur profile as needed. See the video and/or guide 'How to Set Up a Profile in Concur' for more information.

Travelers do not have permission to make changes to other agency traveler profiles.

Important: Travelers are unable to change their first/middle/last name or manager. To make changes to those areas, you need to reach out to your agency Travel Coordinator(s).

### My Profile - Personal Information

Jump To: Personal Information Choose

To see the Notice on Collection for details on how the Statewide Travel Program collects, uses, and shares personal information you provide through this form, please follow this link: <https://www.dgs.ca.gov/OFAM/Travel>

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required\*\*]** (validated and required) must be completed to save your profile.

**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 the gate if the name on your identification does not match the name on your ticket.

Title	First Name	Middle Name <b>[Required]</b>	Preferred Name	Last Name
	William		BETA TESTER	Never

No Middle Name

### Company Information

Employee ID

Manager  Org. Unit/Division  Employee Position/Title

Fiscal Reporting Structure **[Required]**

Save

## 2. Instructions for Travel Coordinators

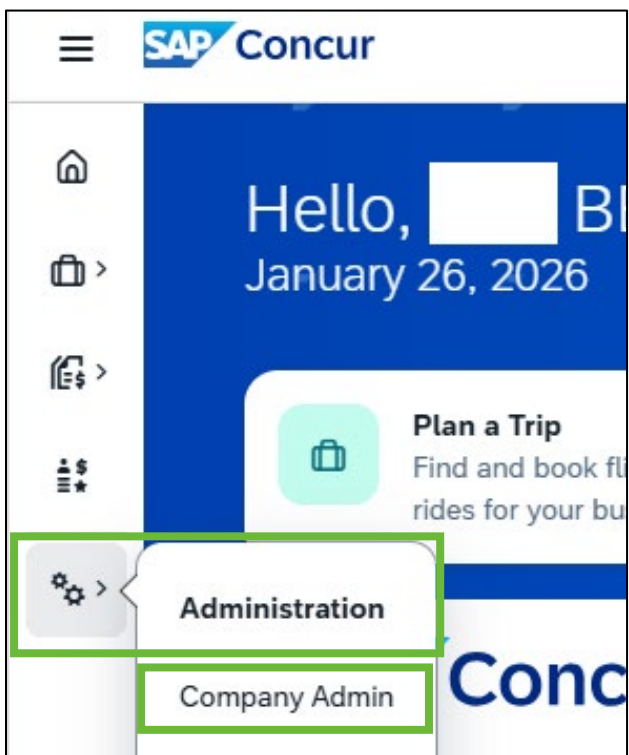
Only accounts that are part of the "Travel Administrators" group in Concur can edit an agency traveler's name, manager, or group membership.

All agency Travel Coordinators should be listed as "Travel Administrators" for their agency. See section 2.5 of this document for more information.

### 2.1 Log into Concur

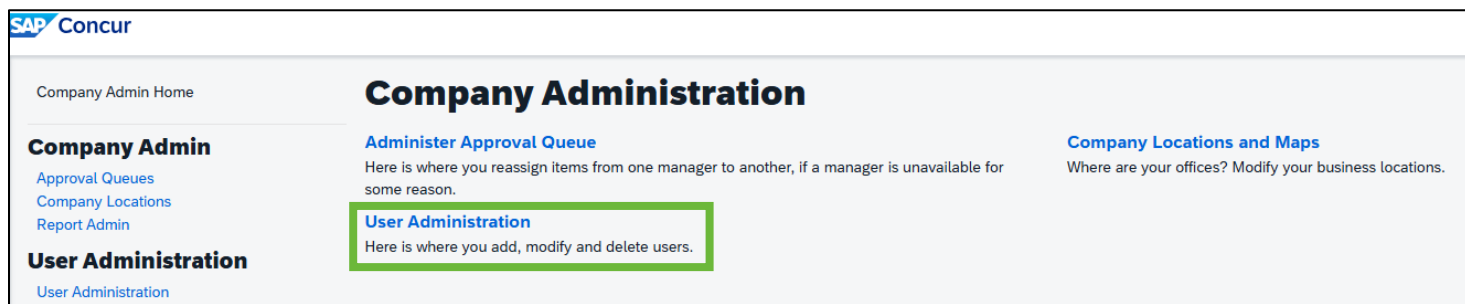
Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

Click "Administration," "Company Admin."



### 2.2 Find the User

When the page loads, click "User Administration."



## HOW TO CHANGE A USER'S CONCUR PROFILE

Type the user's name in the search bar. Click "Search."

The screenshot shows the 'User Administration' page. At the top, there is a '+ Add New User' link and a 'Show Filters' checkbox. Below this is a 'Filters' section with three dropdown menus: 'Manager' (set to 'All Managers'), 'Org. Unit' (set to 'All'), and 'Location' (set to 'All Locations'). There is an 'Add' button next to the 'Org. Unit' dropdown. Below the filters are 'User Status' (set to 'Active') and 'Max Results' (set to '25'). A 'Search Text' input field is highlighted with a green box. To its right is a 'Search What' dropdown menu set to 'Name, Email, Log-in'. Below these are 'Columns To Display' checkboxes for 'Login ID', 'Manager', 'Org. Unit', and 'Job Title', all of which are checked. At the bottom right, there are 'Search' and 'Reset' buttons, with the 'Search' button highlighted by a green box.

A list of employees with Concur profiles that meet the search criteria will appear. Review the names. Once you have found the correct user, click on their name. This will pull up their User Details.

The screenshot shows the search results page. At the top, there is a 'Search Text' input field containing 'never' and a 'Search What' dropdown menu set to 'Name, Email, Log-in'. Below this are 'Columns To Display' checkboxes for 'Login ID', 'Manager', 'Org. Unit', and 'Job Title', all of which are checked. There are 'Search' and 'Reset' buttons. Below the search controls is a navigation bar with letters A through Z. The main content area is titled 'Users' and contains a table with three columns: 'Last / First', 'Job Title', and 'Org. Unit'. The table lists five entries, all with the name 'Never, William'. The entire table area is highlighted with a green border.

The "User Details" page will load for the traveler you selected.

The screenshot shows the 'User Details' page. At the top, there is a 'User Details' header with a green highlight, and three buttons: 'Save', 'Save and New', and 'Cancel'. Below this is an 'MFA Reset' section with a 'Reset' button and a note: 'This resets the user's MFA details, and they must now re-register their MFA methods upon their next sign-in.' Below the MFA section is a 'General Settings' section with several input fields: 'CTE Login Name\*' (with a note '(must be suffixed with a valid domain)'), 'Password\*' (with a note '(Blank to leave unchanged)'), 'Verify Password\*', 'Title', 'First Name\*' (set to 'William'), 'Middle Name', 'Preferred Name', 'Last Name\*' (set to 'Never'), and 'Suffix'. There are also fields for 'Account Activation Date' (set to '07/23/2024'), 'Employee ID', and 'Email Address' (set to '@dgs.ca.gov').

## 2.3 Edit the Traveler's Name

Edit the traveler's name where necessary. Be sure to spell it correctly. Travelers may be turned away if the name on their photo identification does not match their travel reservations.

- A. "First Name" - highlight the current name, delete it, and type the updated name.
- B. "Middle Name" – highlight the current name, delete it, and type the updated name. If the user does not have a middle name, leave the field blank.
- C. "Last Name" - highlight the current name, delete it, and type the updated name.

The screenshot shows the 'General Settings' form. The 'First Name' field contains 'William' and is highlighted with a green box labeled 'A'. The 'Middle Name' field is empty and highlighted with a green box labeled 'B'. The 'Last Name' field contains 'Never' and is highlighted with a green box labeled 'C'. Other fields include 'CTE Login Name\*', 'Password\*', 'Verify Password\*', 'Title', 'Preferred Name', 'Account Activation Date' (07/22/2024), 'Employee ID', 'Account Termination Date', and 'Email Address' (@dgs.ca.gov).

Make other desired changes, if necessary. Continue to section 2.6 of this document once all changes have been completed.

## 2.4 Edit the Traveler's Manager

Under "Travel Settings," find the "Manager Name" section.

The screenshot shows the 'Travel Settings' form. The 'Manager Name' section is highlighted with a green box. It contains a text input field with 'Never, William' and two buttons: 'Edit' and 'None'. Other sections include 'User Group Membership (Group Id)' with checkboxes for 'STP Staff (328511199)', 'Authorized Support Contact (50156296)', and 'Travel Administrators (26650155)'. There is also a 'Reset' button, a 'Rule Class' dropdown menu (Default Travel Class (General Services\_CI)), and an 'Employee Position/Title' field. At the bottom, there are fields for 'Org. Unit/Division', 'PAR/Level 2 STAR', and 'XML Profile Sync ID'.

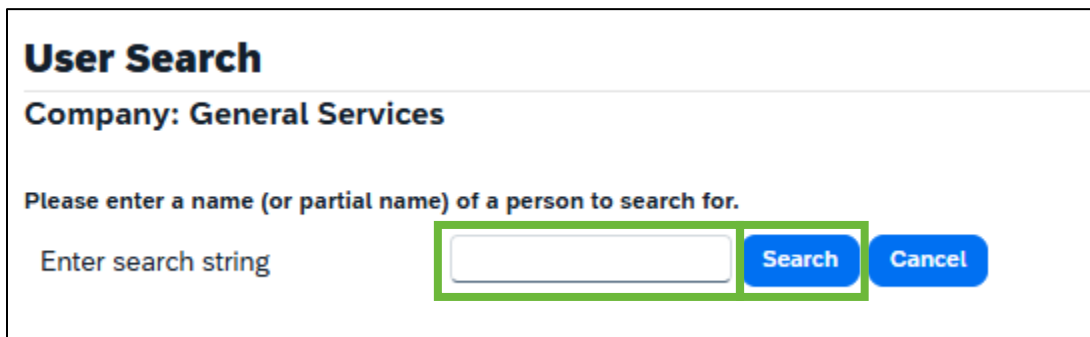
### 2.4.1 Change the Manager

To change the manager, click "Edit."

This is a close-up of the 'Manager Name' section. It shows a text input field with a dashed line underneath, followed by two buttons: 'Edit' and 'None'. The 'Edit' button is highlighted with a green box.

## HOW TO CHANGE A USER'S CONCUR PROFILE

In the pop-up that appears, enter the manager's name and click "Search."



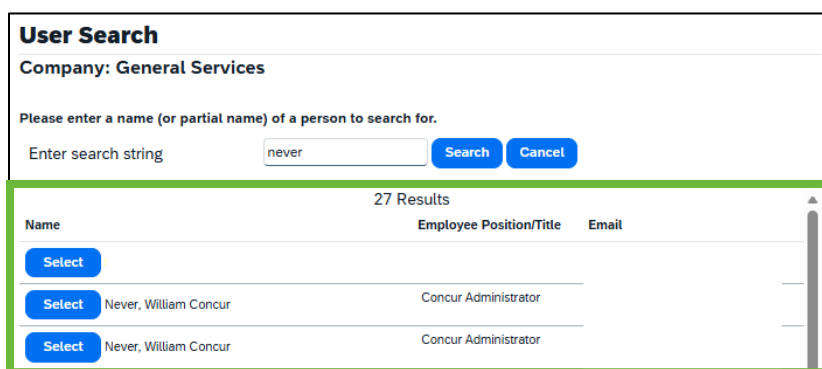
**User Search**

Company: General Services

Please enter a name (or partial name) of a person to search for.

Enter search string

A list of employees with Concur profiles that meet the search criteria will appear.



**User Search**

Company: General Services

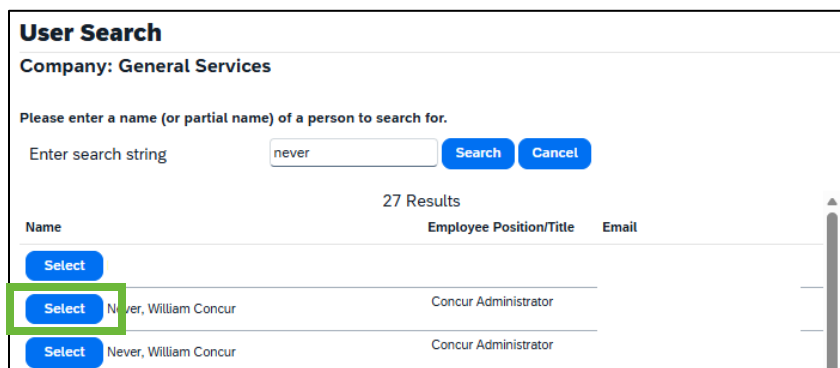
Please enter a name (or partial name) of a person to search for.

Enter search string

27 Results

Name	Employee Position/Title	Email
<input type="button" value="Select"/>		
<input type="button" value="Select"/> Never, William Concur	Concur Administrator	
<input type="button" value="Select"/> Never, William Concur	Concur Administrator	

Once you have found the correct user, click "Select" next to their name.



**User Search**

Company: General Services

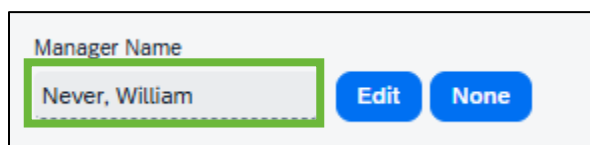
Please enter a name (or partial name) of a person to search for.

Enter search string

27 Results

Name	Employee Position/Title	Email
<input type="button" value="Select"/>		
<input type="button" value="Select"/> Never, William Concur	Concur Administrator	
<input type="button" value="Select"/> Never, William Concur	Concur Administrator	

The pop-up will disappear, and the manager selected will appear in the "Manager Name" box.

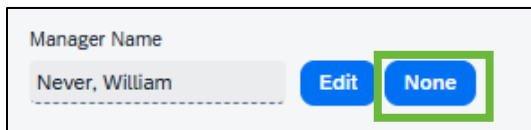


Manager Name

Make other desired changes, if necessary. Continue to section 2.6 of this document once all changes have been completed.

### 2.4.2 Remove the Manager

To remove the manager from the user's profile, click "None."



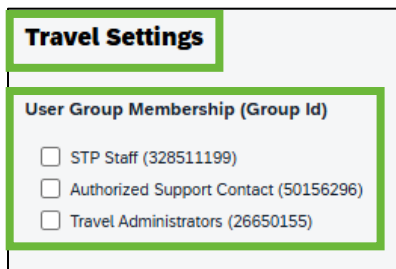
The name will disappear from the "Manager Name" box.



Make other desired changes, if necessary. Continue to section 2.6 of this document once all changes have been completed.

### 2.5 Edit the Traveler's User Group Membership

Under "Travel Settings," find the "User Group Membership" section.



If the traveler is an agency Travel Coordinator, click "Travel Administrators." This will give the user permissions to add/modify/delete agency Concur profiles, access all agency traveler profiles, and more. This user group membership option is **not** to be checked for people who are simply Travel Assistants/Arrangers.

Important: Do not click the other permissions/checkboxes, as they are not applicable to anyone outside of the Statewide Travel Program.



Make other desired changes, if necessary. Continue to section 2.6 of this document once all changes have been completed.

## 2.6 Save the Changes

Ensure the "Password" box is blank to avoid changing it.

**General Settings**

CTE Login Name\* (must be suffixed with a valid domain)  
@dgs.ca.gov

Password\* (Blank to leave unchanged)

Verify Password\*

Title First Name\* Middle Name Preferred Name Last Name\* Suffix  
William Never

Click "Save." There is a save button at the top and bottom of the page. Either will save all changes made to the profile.

**User Details**

Save Save and New Cancel

**MFA Reset**

Reset

This resets the user's MFA details, and they must now re-register their MFA methods upon their next sign-in.

The "User Administration" page will reload. No further action is needed.

## 3. Additional Resources

As a traveler, your first resource for all travel-related inquiries is your agency Travel Coordinator(s). Other helpful resources are:

### 3.1 CI Azumano

Email: [CalTravel@ciazumano.com](mailto:CalTravel@ciazumano.com)

Travel Agents: (877) 454-8785 (use only if trip is in progress)

- [CI Azumano Webpage](#)
- [Concur Login Page](#)

### 3.2 Statewide Travel Program

Email: [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov)

Find the following videos and guides on the [Statewide Travel Program Training Resources Page](#):

- How to Assign and Remove a Travel Arranger/Assistant
- How to Book a Rental Car
- How to Book a Train
- How to Book Lodging
- How to Book Air
- How to Log into Concur
- How to Set up a Profile in Concur