

# How to Deactivate a User in Concur

Statewide Travel Program

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# 1. General Information

To deactivate an account, you must have an administrative account in Concur. See the video and/or guide 'How to Change a User's Concur Profile' for more information.

## **When should we deactivate an account?**

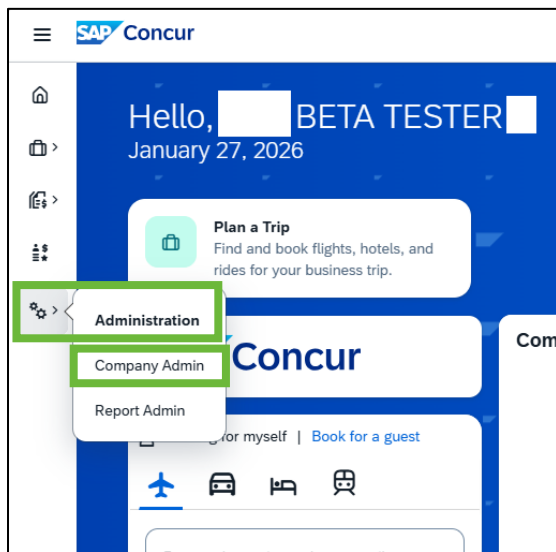
An account should be deactivated when an employee leaves the agency to prevent fraud or misuse of funds. Concur profiles cannot be permanently deleted, so deactivation is the required step to ensure the account is no longer active or accessible.

## **When should we reactivate an account?**

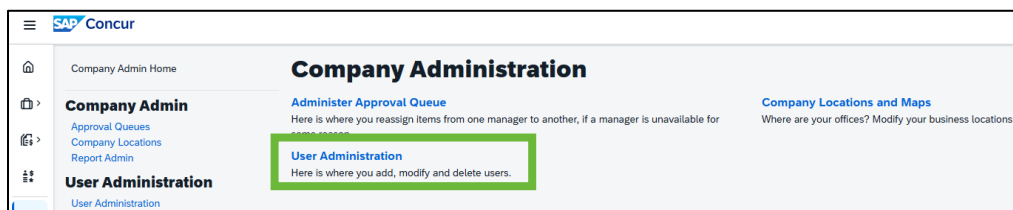
An account should be reactivated if/when an employee returns to an agency where they previously had a Concur profile. Once an account has been created using an email address, that email address cannot be used to create a new login/account. Therefore, the existing profile must be reactivated rather than creating a new one.

## 2. Deactivate an Account

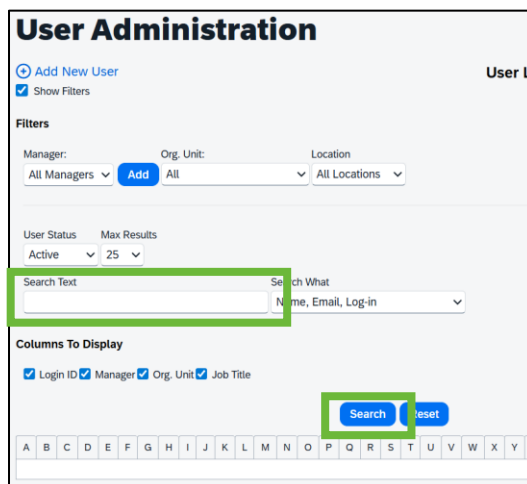
Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. Once you have logged into Concur, click "Administration," "Company Admin."



Click "User Administration."



In the search box, enter the employee's name or email. Click "Search."





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Once the date has been entered, click "Save." Note: The password box must be blank to save the change.

**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.

**General Settings**

CTE Login Name\* (must be suffixed with a valid domain) Password\* (Blank to leave unchanged) Verify Password\*

@dgs.ca.gov

Title First Name\* Middle Name Preferred Name Last Name\*

Suffix

Account Activation Date Account Termination Date

06/19/2024 01/01/2026

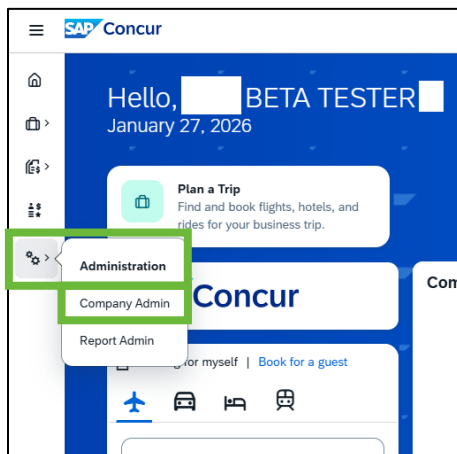
Employee ID Email Address

@dgs.ca.gov

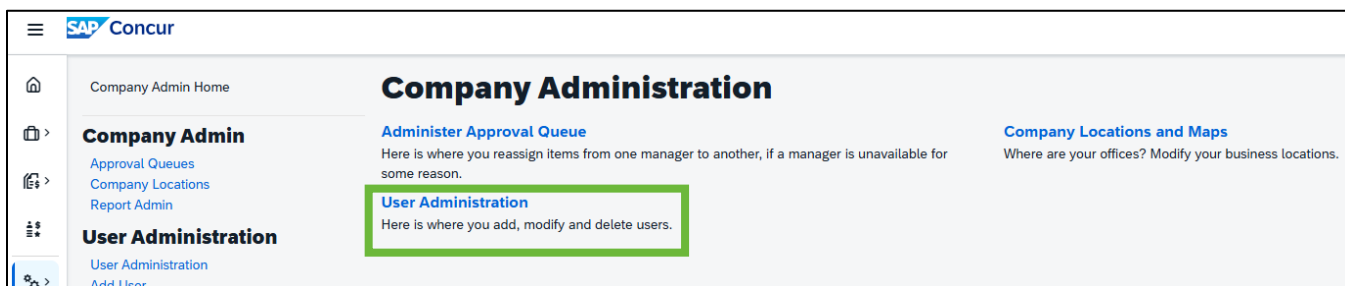
The employee's profile has now been deactivated. They will no longer be able to log into Concur and book travel.

### 3. Reactivate an Account

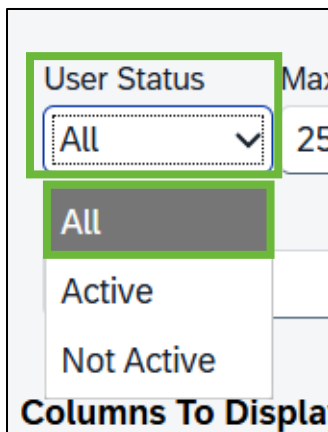
Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. Once you have logged into Concur, click "Administration," "Company Admin."



Click "User Administration."



In the "User Status" drop box, choose "All." This will ensure that deactivated profiles will appear in your search results.



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In the search box, enter the employee's name or email. Click "Search."

The screenshot shows the 'User Administration' interface. At the top left, there are links for 'Add New User' and a checked 'Show Filters' option. Below this is a 'Filters' section with dropdown menus for 'Manager' (set to 'All Managers'), 'Org. Unit' (set to 'All'), and 'Location' (set to 'All Locations'). There is an 'Add' button next to the 'All Managers' 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, and a 'Search What' dropdown is set to 'Name, Email, Log-in'. Below the search fields is a 'Columns To Display' section with checkboxes for 'Login ID', 'Manager', 'Org. Unit', and 'Job Title', all of which are checked. A 'Search' button and a 'Reset' button are highlighted with green boxes. At the bottom, there is an alphabetical navigation bar from A to Z.

A list of users that meet the search parameters will appear. Review the options and select the correct employee by clicking on their name.

The screenshot shows a table titled 'Users' with the following columns: Last / First, Job Title, Org. Unit, Login ID, Manager, and PROFILE. The table contains four rows of data. The first row is highlighted with a green box. The text 'Records 1 - 25 of 29 Records' and 'Next >> 25 Get All' is visible at the top right of the table area.

Last / First	Job Title	Org. Unit	Login ID	Manager	PROFILE
Never, William		Dept of General Services			
Never, William					
Never, William				xm Never, William	
Never, William				None	

The "User Details" page will load.

The screenshot shows the 'User Details' page. At the top, there are buttons for 'Save', 'Save and New', and 'Cancel'. Below this is the '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.' The 'General Settings' section contains 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\*', 'Middle Name', 'Preferred Name', 'Last Name\*', 'Suffix', 'Account Activation Date' (set to 06/19/2024), 'Account Termination Date' (set to 01/01/2026), 'Employee ID', and 'Email Address' (with a note ':@dgs.ca.gov').

## HOW TO DEACTIVATE A USER IN CONCUR

Under “Account Termination Date,” remove the date.

### General Settings

CTE Login Name\* *(must be suffixed with a valid domain)* Password\* *(Blank to leave unchanged)* Verify Password\*

@dgs.ca.gov ..... @dgs.ca.gov

Title First Name\* Middle Name Preferred Name Last Name\*

Suffix

Account Activation Date Account Termination Date

06/19/2024 01/01/2026

Employee ID Email Address

:@dgs.ca.gov

Once the date has been removed, click “Save.” Note: The password box must be blank to save the change.

### 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.

#### General Settings

CTE Login Name\* *(must be suffixed with a valid domain)* Password\* *(Blank to leave unchanged)* Verify Password\*

@dgs.ca.gov @dgs.ca.gov

Title First Name\* Middle Name Preferred Name Last Name\* Suffix

Account Activation Date Account Termination Date

06/19/2024

Employee ID Email Address

@dgs.ca.gov

The employee's profile has now been reactivated. They will be able to log into Concur and book travel.

## 4. Additional Resources

### 4.1 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](#)

### 4.2 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 Change a User's Concur Profile
- How to Log into Concur
- Travel Coordinator 101