

FEB  
2026

# How to Set Up a Profile in Concur

Statewide Travel Program

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# 1. Introduction

To access Concur, please reach out to your agency Travel Coordinator(s).

Upon accessing Concur, you need to complete your profile before any trips can be booked.

Inaccurate profile information will result in inaccurate information in your travel reservations.

Air travel is the most critical: An inaccurate name or date of birth can result in denied boarding of the aircraft. It is **your** responsibility to ensure all information is entered accurately and updated whenever necessary.

All required fields of the profile must be completed before travel can be booked. It is strongly encouraged to complete the remaining optional fields.



A screenshot of a web form field. The label 'Middle Name' is followed by a red box containing the word '[Required]' in white text. Below the label is an empty text input box.

## 2. Set Up the Concur Profile

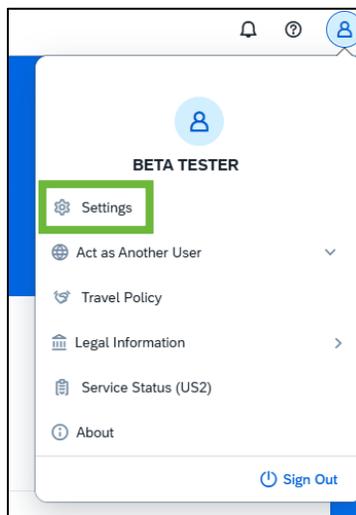
### 2.1 Log into Concur

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

After logging in, click the profile icon in the top right corner.

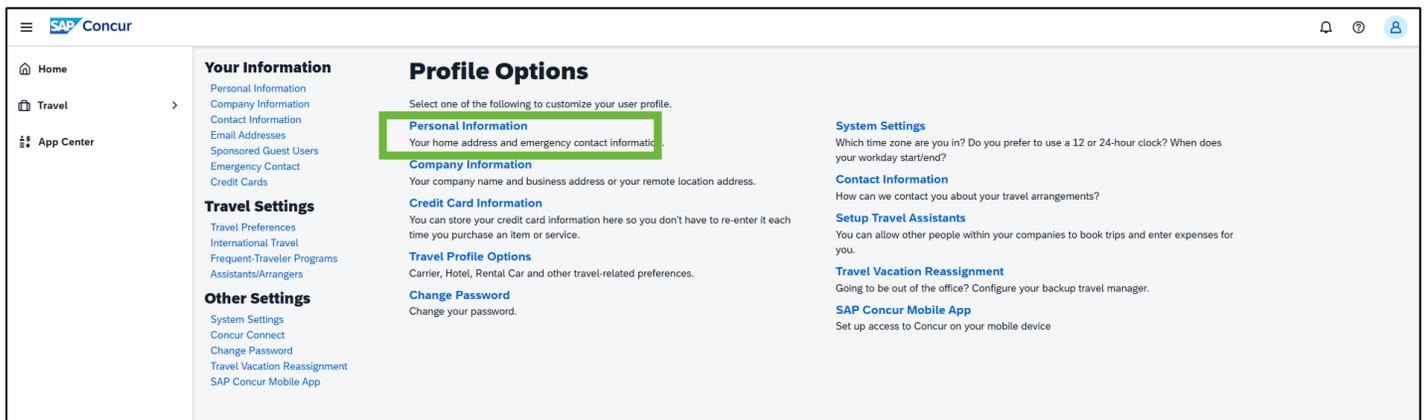


Click "Settings" to complete your profile.



### 2.2 Personal Information

Click "Personal Information."



Fill in your first, middle, and last name as shown on your photo identification. If you don't have a middle name, check the "No Middle Name box" You may be turned away at the gate if the name on your identification does not match your ticket.

**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 <i>William</i>	Middle Name <b>[Required]</b> <input checked="" type="checkbox"/> No Middle Name	Preferred Name	Last Name <i>Never</i>	Suffix
-------	------------------------------	---	----------------	---------------------------	--------

Important: Once you have saved your updates, your name will **not** be editable. To make any name changes, you will need to reach out to your agency Travel Coordinator(s).

## 2.3 Company Information

Under company information, fill in your employee ID (if applicable).

**Company Information**

Employee ID

Manager      Org. Unit/Division      Employee Position/Title

Fiscal Reporting Structure **[Required]**

### 2.3.1 Manager Information

If your agency uses pre-trip approval in Concur, entering your manager's name will be marked as "Required." This is the person responsible for reviewing and approving your travel request. If you enter the wrong manager, your travel request will be rejected and canceled. Please see the video 'What to Do if Your Travel Has Been rejected or Approved' or the guide 'Concur Pre-Trip Approval Guide' for more information.

**Company Information**

Employee ID

Manager      Org. Unit/Division      Employee Position/Title

Fiscal Reporting Structure **[Required]**

Important: Once you have saved your updates, the manager field will **not** be editable. To make any future manager changes, you will need to reach out to your agency Travel Coordinator(s).

### 2.3.2 Expense Information

If your agency has chosen to require expense information, such as Fi\$Cal reporting structure numbers or PCA/index coding, this information must be provided to complete the section.

**Company Information**

Employee ID

Manager      Org. Unit/Division      Employee Position/Title

**Fiscal Reporting Structure [Required]**

Your agency may have additional required questions in this section. Please reach out to your agency Travel Coordinator(s) with any questions you may have about other requirements in this section, if applicable.

**Company Information**

Employee ID

Manager      Org. Unit/Division      Employee Position/Title

**Reporting Unit-3 digit numbers only please [Required]**      **Division - 3 digit alpha only please [Required]**

123      123

### 2.4 Work Address

Enter your work address. This is not required but can be helpful when searching for travel by company location.

**Work Address**

Company Name      Assigned Location

General Services      Please choose a company location. ▾

Street

Address same as assigned location

City      State/Province

Postal Code      Country/Region

     United States of America ▾

## 2.5 Home Address

This section is optional.

Enter your home address.

**Home Address**

Street

City  State/Province

Postal Code  Country/Region  
 United States of America

## 2.6 Contact Information

Under contact information, you are required to include either a work phone **or** a home phone. You may provide a cell phone number as your home phone.

**Contact Information**

Work Phone[Required\*\*]  Work Extension  Work Fax  2nd Work Phone/Remote Office  Home Phone[Required\*\*]

Pager  Other Phone

Mobile Phone Country/Region  Mobile Phone

**\*\*You must specify either a home phone or a work phone.**

Additional contact information is not required but can be used by our travel vendors to communicate with you, if necessary.

## 2.7 Email Address

This section is optional.

Add as many email address(es) as desired, to receive your trip itineraries such as managers, Travel Coordinators, or personal emails.

If you assign someone as your Primary Assistant, they will automatically receive your trip itinerary as well as any changes or cancellations to the trip. For instructions on adding a Travel Arranger or Assistant, see section 2.10.5 of this document.

**Email Addresses** Go to top

Please add at least one email address.

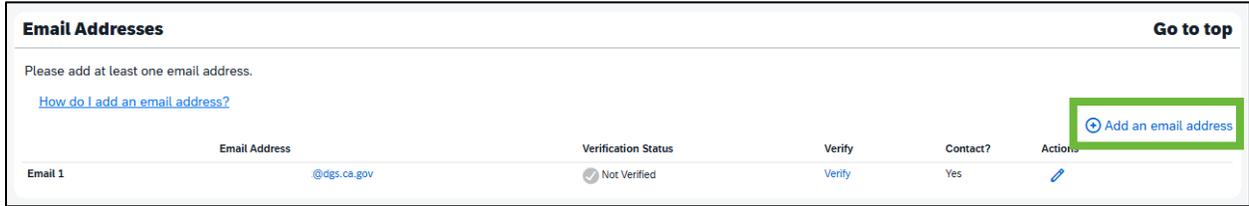
[How do I add an email address?](#)

[Add an email address](#)

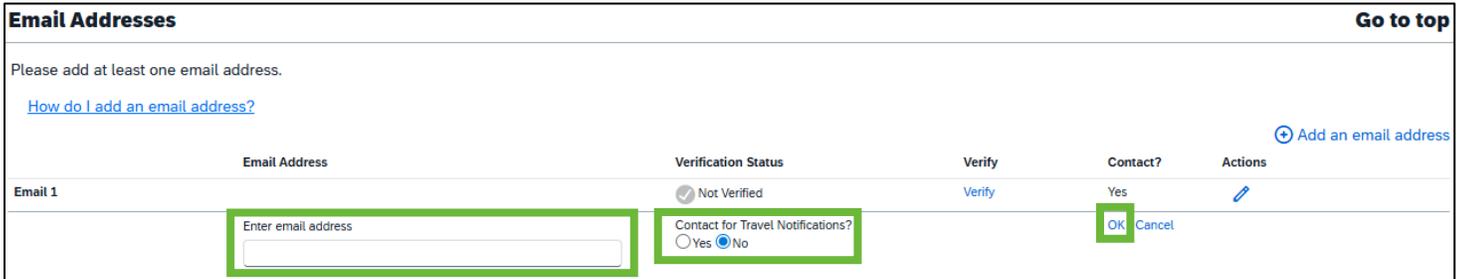
Email Address	Verification Status	Verify	Contact?	Actions
Email 1 @dgs.ca.gov	Not Verified	Verify	Yes	

### 2.7.1 Add an email address

To add an email address, click "Add an email address."



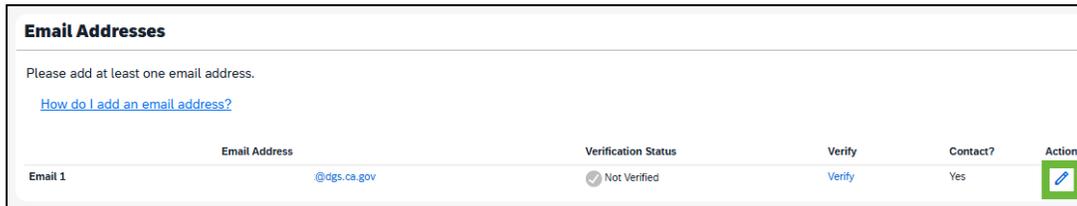
In the section that appears, enter the email address. Check "Yes" if you would like this person to be notified of your travel bookings. Click "OK" to add the email.



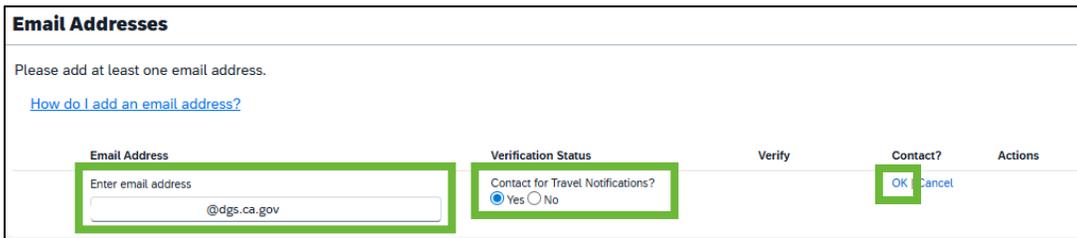
You can add as many emails as desired.

### 2.7.2 Edit an email address

To edit an email address, click the pencil icon.



The email address will become editable. Make any changes necessary. Check "Yes" if you would like this person to be notified of your travel bookings. Click "OK" to save the updates to the email.



### 2.7.3 Remove an email address

To remove an email address from your profile, click the trash can icon.

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 @dgs.ca.gov	✔ Not Verified	Verify	Yes	
Email 2 @gmail.com	✔ Not Verified	Verify	No	

A pop-up will appear asking for confirmation to delete the email. Click "OK" to proceed with deleting.

**us2.concursolutions.com says**

Are you sure you want to remove this email?

When the page refreshes, the email will no longer appear in your profile. There will be a note to confirm the email has been removed.

**Email Addresses** Go to top

Please add at least one email address.  
[How do I add an email address?](#) [Add an email address](#)

**Email Address(es) have been removed.**

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 @dgs.ca.gov	✔ Not Verified	Verify	Yes	

## 2.8 Emergency Contact

This section is optional.

Enter emergency contact information.

**Emergency Contact**

Name  Relationship

Street   Address same as employee

City  State/Province  Postal Code

Country/Region  Phone  Alternate Phone

*United States of America*

## 2.9 Travel Preferences

The only required section of "Travel Preferences" is "TSA Secure Flight." The remaining sections are not required but allow your preferences to be added automatically when searching for travel.

### 2.9.1 Discount Rates

If you choose any of the discount rates displayed, you must be able to provide proper identification or membership. For example, if you choose “AAA,” you must show your AAA card when checking into a hotel. The box for “Government” travel rates/fares should **not** be checked as it applies to federal government rates and fares only.

**Travel Preferences**

---

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

AAA/CAA  
  Government  
  Military  
  Senior/AARP

### 2.9.2 Air Travel Preferences

Entering your air travel preferences helps with filtering searches by desired amenities and communicate any special travel needs/requests to the vendor. When you add your preferred departure airport to your profile, it will automatically populate when searching for tickets. You can change this preference during the search process without returning to your profile. This section also allows you to notify the airline of any medical restrictions you have, if applicable.

**Air Travel Preferences**

Seat:   
 Seat Section:   
 Special Meals:   
 Ticket Delivery:

Don't Care  
  Don't Care  
  Regular Meal  
  E-ticket when possible

Preferred Departure Airport  
  Other Air Travel Preferences  
  Medical Alerts

### 2.9.3 Hotel and Car Rental Preferences

Setting your hotel and car rental preferences ensures that search results highlight options with amenities that match your needs.

**Hotel Preferences**

Room Type:   
 Smoking Preference:   
 Message to Hotel Vendor:

Don't Care  
  Don't Care  
  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**

State of California does not reimburse for Navigational systems (GPS).

Car Type:   
 Smoking Preference:   
 Car Transmission:

Any Car Class  
  Don't Care  
  Don't Care  
  In-car GPS system  
  Ski rack

Message to Car Rental Vendor:

**Important:** The state does not reimburse the cost of renting an in-car GPS system or ski rack (applicable to executive branch agencies only).

## 2.9.4 Add a Frequent-Traveler and/or Advantage Program(s)

The state follows federal guidelines allowing travelers to retain frequent traveler benefits (brand loyalty programs) for personal use. You may add any Frequent-Traveler and/or Advantage Programs you belong to.

To add, click the "Add a program" button.

You can add up to 5 programs at a time in the pop-up box after clicking "Add a program." Indicate if the vendor is "air/rail," "rental car" or "hotel" by selecting the correlating icon.

Choose the vendor in the "Carrier" drop-down menu.

Add the "Frequent Traveler" number. Ensure the number is exactly as it appears on your card. Any errors may result in billing errors.

If you would like this vendor to appear when searching for travel, click "Search this vendor."

## HOW TO SET UP A PROFILE IN CONCUR

Complete these steps up to five times to add up to five frequent-traveler programs. After adding your program(s), click "Save" at the bottom of the pop-up box.

### Add Travel Programs

**1** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

1	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		Select a carrier		<input checked="" type="checkbox"/>
2	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		Select a carrier		<input checked="" type="checkbox"/>
3	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		Select a carrier		<input checked="" type="checkbox"/>
4	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		Select a carrier		<input checked="" type="checkbox"/>
5	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		Select a carrier		<input checked="" type="checkbox"/>

If you have more than five rewards program numbers, you may click the "Add a program" link again to add any additional programs.

### Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

	Wyndham (Chain) (WR) Wyndham Rewards	Search this vendor	122345	<input checked="" type="button" value="Add a Program"/>
--	--------------------------------------	--------------------	--------	---

**Important:** Ensure the rewards program numbers are input correctly, as incorrect numbers can cause direct billing issues. Enterprise rewards numbers are 7 characters and National reward numbers are 9 characters.

### 2.9.5 Edit a Frequent-Traveler and/or Advantage Program(s)

To edit Frequent-Traveler or Advantage Program information in your profile, click on the pencil next to the loyalty number.

### Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

	Wyndham (Chain) (WR) Wyndham Rewards	Search this vendor	122345	<input checked="" type="button" value="Add a Program"/>
--	--------------------------------------	--------------------	--------	---

In the pop-up that appears, make edits to the "Program Account Number," if necessary. If you would like this vendor to appear when searching for travel, click "Search this vendor."

### Edit a Travel Program

**1** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

Change your program number and click Save.

Wyndham (Chain) (WR) (Wyndham Rewards)

Program Account Number

122345  Search this vendor.

## HOW TO SET UP A PROFILE IN CONCUR

Once the edits have been made, click "Save Changes."

### Edit a Travel Program

**i** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

Change your program number and click **Save**.

**Wyndham (Chain) (WR)**  (Wyndham Rewards)

Program Account Number  
122345  Search this vendor.

**Save Changes** **Cancel**

**Important:** Ensure the rewards program numbers are input correctly, as incorrect numbers can cause direct billing issues. Enterprise rewards numbers are 7 characters and National reward numbers are 9 characters.

### 2.9.6 Remove a Frequent-Traveler and/or Advantage Program(s)

To delete a Frequent-Traveler or Advantage Program, click the trash can next to the loyalty number.

### Frequent-Traveler Programs

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

	Wyndham (Chain) (WR) Wyndham Rewards	Search this vendor	122345	
---	--------------------------------------	--------------------	--------	--

A pop-up will appear asking you to confirm you would like to remove the program. Click "OK."

**us2.concursolutions.com says**

Click OK to continue or click Cancel to keep your accounts linked.

**OK** **Cancel**

When the page reloads, the information will no longer appear in the "Frequent-Traveler Programs" section of your profile.

### Frequent-Traveler Programs

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

No programs defined

**Important:** Ensure the rewards program numbers are input correctly, as incorrect numbers can cause direct billing issues. Enterprise rewards numbers are 7 characters and National reward numbers are 9 characters.

### 2.9.7 Unused Tickets

This section stores any applicable unused airline ticket credits. Unused airline ticket credits must **always** be utilized for future business trips. Contact your agency Travel Coordinator(s) for more information about unused ticket credits and how they are applied to future travel.

### 2.9.8 TSA Secure Flight

Within the TSA Secure Flight section, you **must** provide your birthdate and gender.

If you have a TSA Pre-Check Known Traveler Number, you may enter it. If you participate in the Pre-Check program, please note that it is a non-reimbursable expense (applies to executive branch agencies). Entering your TSA Pre-Check number does not guarantee access to the TSA Pre-Check security checkpoint. Please see [TSA PreCheck®](#) for more information.

## 2.10 International Travel: Passports and Visas

If you are traveling internationally, you **must** enter your passport or Visa information. This is not required if you are not traveling internationally.

### 2.10.1 Enter Passport Information

Choose the passport nationality and the issuing country/region by using the drop-down menus.

**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**

I do not have a passport

**Add a Passport**

Passport Nationality  Passport Number  Passport Date Issued (mm/dd/yyyy)  Passport Expiration (mm/dd/yyyy)  Passport Place Issued (City, State)  Passport Place Issued (Country/Region)

Enter the passport number in the corresponding field. Enter the city in which the passport was issued, in the "Passport Place Issued" field.

**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**

I do not have a passport

**Add a Passport**

Passport Nationality  Passport Number  Passport Date Issued (mm/dd/yyyy)  Passport Expiration (mm/dd/yyyy)  Passport Place Issued (City, State)  Passport Place Issued (Country/Region)

Either type the date or use the calendar to enter the date issued, and the expiration date.

**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**

I do not have a passport

**Add a Passport**

Passport Nationality  Passport Number  Passport Date Issued (mm/dd/yyyy)  Passport Expiration (mm/dd/yyyy)  Passport Place Issued (City, State)  Passport Place Issued (Country/Region)

Ensure the passport information is accurate. Inaccurate information may result in being turned away upon check-in.

### 2.10.2 No passport

If you do not have a passport, check "I do not have a passport."

**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**

I do not have a passport

**Add a Passport**

Passport Nationality  Passport Number  Passport Date Issued (mm/dd/yyyy)  Passport Expiration (mm/dd/yyyy)  Passport Place Issued (City, State)  Passport Place Issued (Country/Region)

Important: Communicate with your agency Travel Coordinator(s) if you must travel internationally and do not have a passport.

### 2.10.3 Enter Visa information

To enter Visa information if applicable, click “Add a Visa.”

**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**

I do not have a passport

**Add a Passport**

Passport Nationality  Passport Number  Passport Date Issued (mm/dd/yyyy)  Passport Expiration (mm/dd/yyyy)  Passport Place Issued (City, State)  Passport Place Issued (Country/Region)

**International Visas** Add a Visa

In the section that appears, use the drop-down menu to select the Visa nationality and Visa type.

**International Visas**

Add a Visa

Visa Nationality  Visa Type  Visa Number  Visa Expiration

Visa Nationality  Visa Type  Visa Number  Visa Expiration (mm/dd/yyyy)

Enter the Visa number.

**International Visas**

Add a Visa

Visa Nationality  Visa Type  Visa Number  Visa Expiration

Visa Nationality  Visa Type  Visa Number  Visa Expiration (mm/dd/yyyy)

Either type the date or use the calendar to choose the “Visa Expiration” date.

**International Visas**

Add a Visa

Visa Nationality  Visa Type  Visa Number  Visa Expiration

Visa Nationality  Visa Type  Visa Number  Visa Expiration (mm/dd/yyyy)

Click the save icon to add the Visa to your account.

**International Visas**

Add a Visa

Visa Nationality  Visa Type  Visa Number  Visa Expiration

Visa Nationality  Visa Type  Visa Number  Visa Expiration (mm/dd/yyyy)

Save X

Ensure the Visa information is accurate. Inaccurate information may result in being turned away upon check-in.

### 2.10.4 Assistants and Travel Arrangers

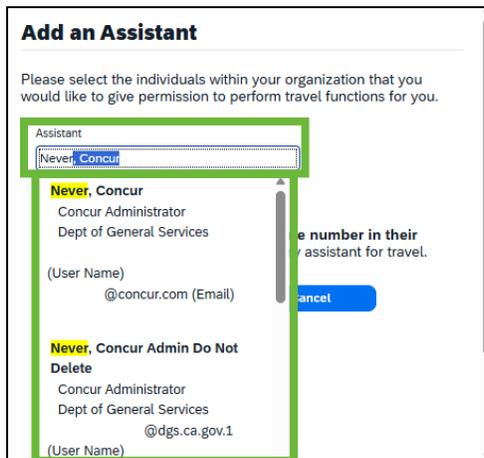
A Travel Arranger/Assistant has permission to book travel on your behalf. You can add as many Travel Arrangers/Assistants as you would like, but **only one** can be the Primary Assistant. The Primary Assistant has the added benefit of always receiving emails with your trip itineraries, travel changes, and cancellations.

### 2.10.5 Add a Travel Arranger/Assistant

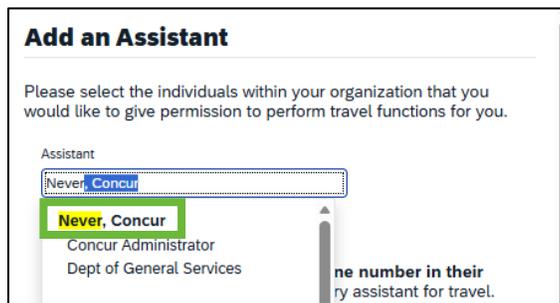
You can add an assistant by clicking on the "Add an Assistant" Link.



A pop-up window will appear. In the "Assistant" field, start typing the person's name. A drop-down menu will appear showing people from your agency with profiles in Concur matching your entry.



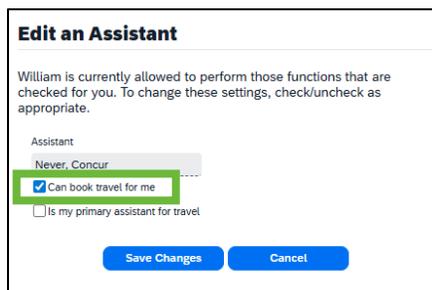
To choose someone from the list, simply click their name.



Important: Whomever you choose to be your Travel Arranger/Assistant **must** have a Concur profile before you can search for and choose them. If they do not have a Concur profile, they will not appear as an option.

## HOW TO SET UP A PROFILE IN CONCUR

Once you have selected the correct person, check “Can book travel for me” to allow them to book travel on your behalf.



**Edit an Assistant**

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

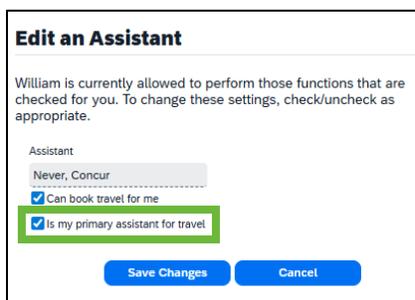
Assistant  
Never, Concur

Can book travel for me

Is my primary assistant for travel

[Save Changes](#) [Cancel](#)

If you would like the person to be your Primary Assistant, check “Is my primary assistant for travel.” Only one Primary Assistant is allowed per profile. The Primary Assistant will always receive emails with your trip itineraries, travel changes, and cancellations.



**Edit an Assistant**

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

Assistant  
Never, Concur

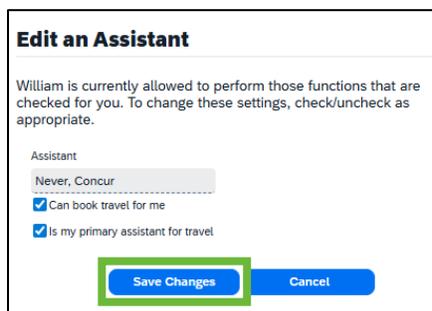
Can book travel for me

Is my primary assistant for travel

[Save Changes](#) [Cancel](#)

Important: If the person you have selected has not entered a work number in their profile, they cannot be designated as the Primary Assistant.

Click “Save Changes” when you have chosen your Travel Arranger/Assistant.



**Edit an Assistant**

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

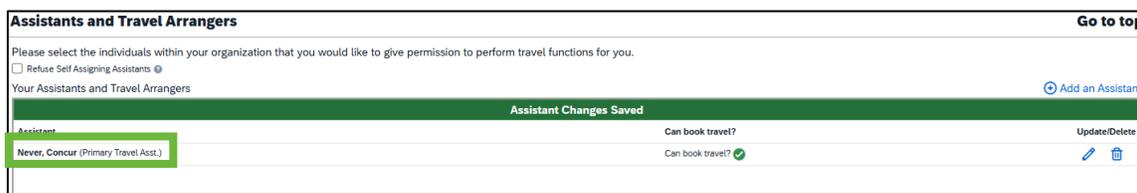
Assistant  
Never, Concur

Can book travel for me

Is my primary assistant for travel

[Save Changes](#) [Cancel](#)

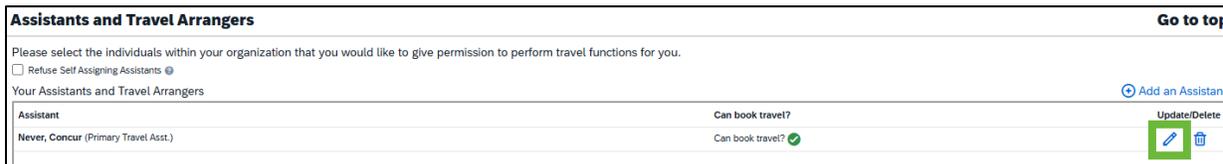
When the page refreshes, the new Travel Arranger/Assistant will appear in your profile.



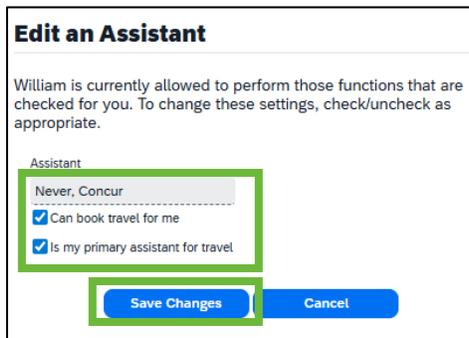
Assistants and Travel Arrangers		Go to top
Please select the individuals within your organization that you would like to give permission to perform travel functions for you.		
<input type="checkbox"/> Refuse Self Assigning Assistants		
Your Assistants and Travel Arrangers <a href="#">Add an Assistant</a>		
Assistant Changes Saved		
Assistant	Can book travel?	Update/Delete
Never, Concur (Primary Travel Asst.)	Can book travel?	<a href="#">Update</a> <a href="#">Delete</a>

## 2.10.6 Edit a Travel Arranger/Assistant

To edit an Assistant, click the pencil icon to the right of that Arranger's/Assistant's name.



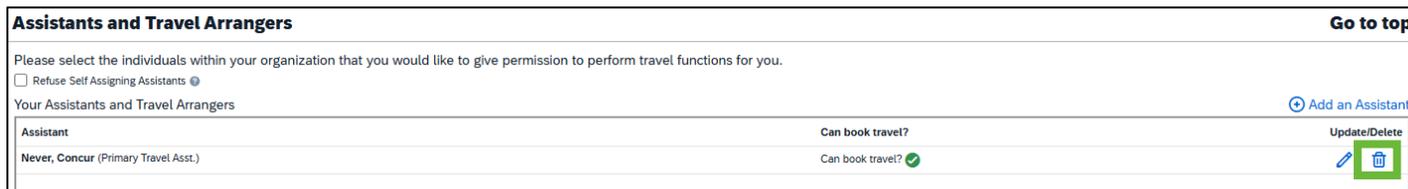
Complete any edits needed in the pop-up box. Click "Save Changes" when finished.



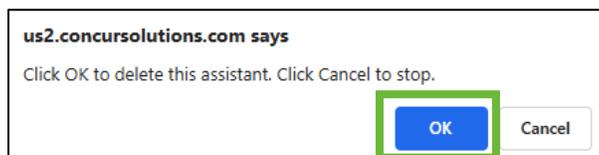
You cannot edit the person's name.

## 2.10.7 Remove a Travel Arranger/Assistant

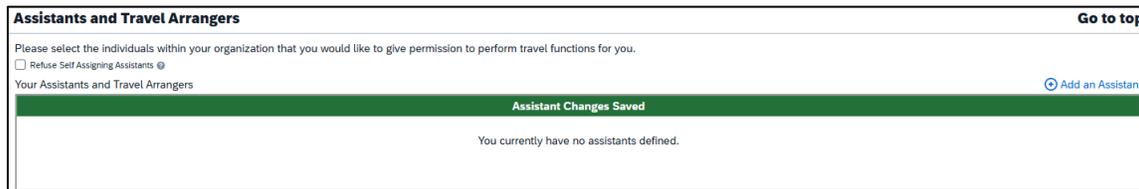
To delete a Travel Arranger/Assistant, click the trash can icon to the right of that person's name.



A pop-up will appear, asking you to confirm you would like to remove the Arranger/Assistant. Click "OK."



When the page reloads, the Arranger/Assistant will no longer appear in your profile.



## 2.11 Credit Cards

### 2.11.1 When is a credit card required?

Airfare, rail tickets, and rental cars are billed directly to your agency, and do **not** require or allow use of a personal credit card in your Concur profile.

If your agency participates in the Virtual Card Program for lodging, a personal credit card is **not** required in your Concur profile.

If your agency does *not* participate in the Virtual Card Program, a personal credit card **is** required to hold any hotel rooms/reservations. Your credit card information will be encrypted; this means that once it is entered, even **you** don't have access to the card number.

### 2.11.2 Add a Credit Card

To add a credit card, click "Add a Credit Card."

A pop-up will appear. Enter the card information by typing the Display Name, Card Number and cardholder name, and use the drop-down menus for Card Type and Expiration Date.

Since airfare, rail tickets, and car rentals are directly billed to your agency, you only need to check "Hotel Reservations" under the "Use this card as the default for" section.

## HOW TO SET UP A PROFILE IN CONCUR

Enter the billing address for the credit card.

### Add a Credit Card \* Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) \*  Your name as it appears on this card \*

Card Type \*  Credit Card Number \*  Expiration Date \*

Use this card as the default card for:  
 Plane Tickets  Rail Tickets  Car Rentals  Hotel Reservations

#### Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate.  
Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street \*  Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City \*  State \*  Zip/Postal Code \*

Country/Region \*

Once the credit card's information is added, click "Save."

### Add a Credit Card \* Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) \*  Your name as it appears on this card \*

Card Type \*  Credit Card Number \*  Expiration Date \*

Use this card as the default card for:  
 Plane Tickets  Rail Tickets  Car Rentals  Hotel Reservations

#### Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate.  
Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street \*  Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City \*  State \*  Zip/Postal Code \*

Country/Region \*

Important: The system will not save invalid card information.

**us2.concursolutions.com says**

This card number is not valid.

### 2.11.3 Edit a Credit Card

To edit a credit card in your profile, locate the card and click the pencil icon.



A pop-up will appear. As noted along the top of the pop-up, you will not have access to the full card number for security purposes. Edit the necessary information. See section 2.11.2 of this document for details about entering information. Once you've edited the credit card, click "Save."

The 'Edit Credit Card' form includes a security warning at the top: 'For security, your credit card number is not displayed. If you think your credit card number is wrong, delete this credit card record and insert a new one with the correct information.' Below this, there are fields for 'Display Name' (set to 'Card'), 'Your name as it appears on this card', 'Card Type' (VISA), and 'Expiration Date'. There are also checkboxes for 'Use this card as the default card for:' with 'Hotel Reservations' selected. A 'Billing Address' section follows, with fields for Street, City (Sacramento), State (California), Zip/Postal Code, and Country/Region (United States of America). At the bottom, there are 'Cancel', 'Reset', and 'Save' buttons, with the 'Save' button highlighted in green.

### 2.11.4 Remove a Credit Card

To remove a credit card that has already been added to your profile, click the trash can icon.



A pop-up will appear asking for confirmation to delete the card. Click "OK."

The confirmation dialog box has a title 'us2.concursolutions.com says' and the text 'Click OK to delete this credit card. Click Cancel to stop.' At the bottom, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted in green.

When the page refreshes, the card will no longer appear in your profile.

**Credit Cards** Go to top

You currently have the following credit cards saved with your profile.

[Add a Credit Card](#)

You currently have no credit cards saved.

## 2.12 Save Your Profile

The “Save” button appears under each section within your profile. Clicking “Save” in any section saves the entire profile, so you only need to click “Save” once after completing all edits.

Once your profile is complete, click any of the “Save” buttons throughout the page.

**Company Information** Go to top

Employee ID

Manager Org. Unit/Division Employee Position/Title

Fiscal Reporting Structure **[Required]**

**Save**

**Work Address** Go to top

Company Name Assigned Location

Street

City State/Province

Postal Code Country/Region

**Save**

After clicking “Save,” the “Profile Options” page will reload with a “Profile Saved” note in the top right corner.

**SAP Concur** Profile Saved

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Sponsored Guest Users

**Profile Options**

Select one of the following to customize your user profile.

**Personal Information**  
Your home address and emergency contact information.

**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?

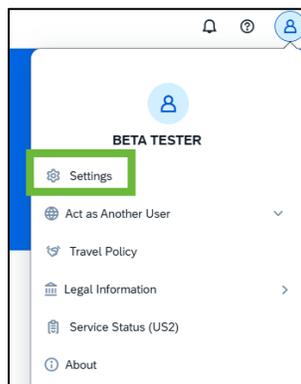
### 3. Making Changes

If you want to make any changes to your profile, log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

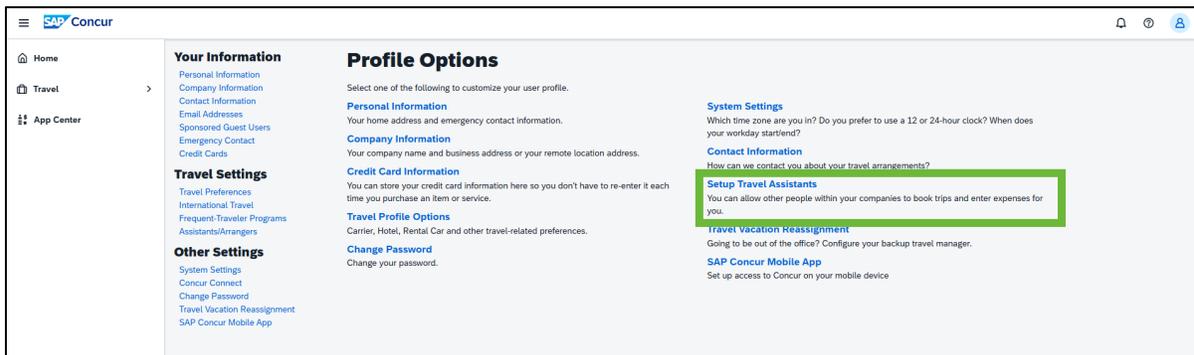
After logging in, click the profile icon in the top right corner.



Click "Settings" to make changes to your profile.



You can choose any section of the profile that you need to edit. For example, adding another travel assistant.



You can add information or make changes to any section except your name or manager. Please see Section 2 of this document for detailed instructions on how to add, edit or remove information to your profile.

To change your name or manager in Concur, you must reach out to your agency Travel Coordinator(s).

## 4. Additional Resources

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

### 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](#):

- Concur Pre-Trip Approval Guide
- How to Book Air
- How to Book Lodging
- How to Book a Rental Car
- How to Book Train
- How to Log into Concur
- What to Do if Your Travel Has Been Rejected or Approved