

## Creating a Concur Profile – Step by step guide:

 **Welcome to Concur!**  
Registering for your account is quick and easy. Please fill in the information requested below to continue.

Please fill out all fields. Typically, your Cliqbook Log-in should be the same as the first part of your email address (before the "@"-).

**Account Information**

Concur Login \*  @dbo.ca.gov

**Contact Information**

**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.

First Name \*   
Middle Name   
Last Name \*   
Work Email Address \*  @dbo.ca.gov  
Work Phone \*   
Home Phone

**Home Address**

no p.o. boxes please

Street Address 1:   
Street Address 2:   
City   
Country **United States of America** ▼  
State/Province/Region **None Selected** ▼  
Postal Code

**Configuration Settings**

Time Zone \* **(UTC-08:00) Pacific Time (US & Canada)** ▼  
Date Format \* **M/D/Y** ▼

\* marked fields are mandatory

Please remember to review and update your travel profile before attempting to arrange travel. This can be done by clicking on **My Travel Profile** from the Travel Home page.

If you have any difficulties registering, please contact your Travel Administrator for assistance.

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You will receive a link from your department's travel coordinator that will bring you to the Concur log registration page. Fill out the required fields and submit the registration request.

## Welcome

If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below.



## Login

User Name

Password

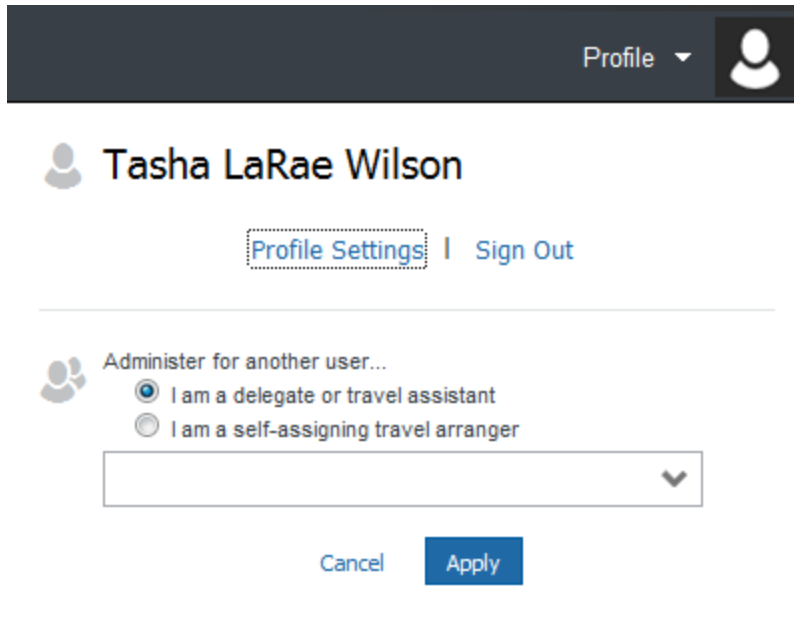
Remember user name on this computer

[Forgot your user name?](#)

[Forgot your password?](#)

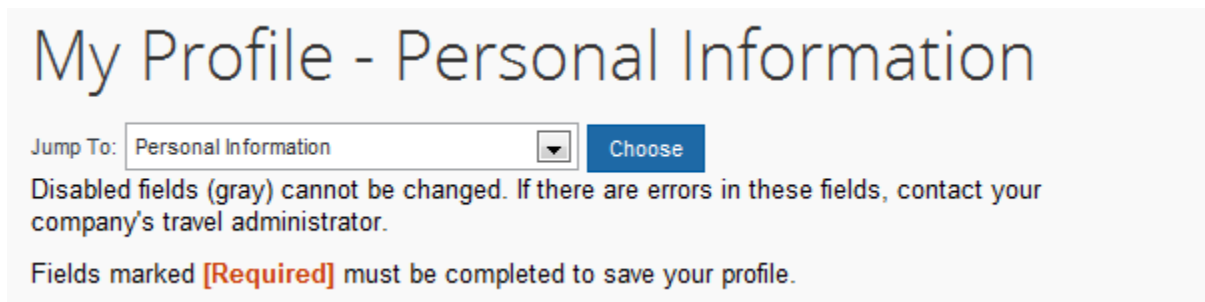
Passwords are case sensitive.

Once completed you will receive two emails from Concur, one will contain a link to your Concur profile. When you click the link you will be taken directly into your profile where you need to change your password. All future logins will be done by going to [www.caltravelstore.com](http://www.caltravelstore.com) and clicking on the concur link for access to the log in screen



When you log in you will be brought to the home page. In the upper right hand corner click on the down arrow next to “profile” and select “Profile Settings”.

You will then be brought to the profile page. There are only a few required fields, but you may make your profile as thorough or as limited as you would like.



When you enter your name, it is important that you enter it EXACTLY how it shows on your photo identification, such as your driver’s license. The name you enter here is how your name will be printed on your ticket.

If after you’ve saved your profile you realized that you had a typo in the spelling of your name, or any other greyed out area, you will need to contact the Cal Travel Store at 1-877-454-TRVL (8785) in order for it to be changed.

## ! 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	Middle Name	Nickname	Last Name	Suffix
<input type="text"/>	<input type="text" value="Tasha"/>	<input type="text" value="LaRae"/>	<input type="text"/>	<input type="text" value="Wilson"/>	<input type="text"/>

The next section is your company information. This is not a required field, but allows you to enter in some of your department information.

### Company Information

Employee ID

Manager

Employee  
Position/Title

Org. Unit/Division

Save

While there is an option to save after every section, when you are first creating your profile, you will not be able to use it because there are required fields not filled in yet. However, if at any time you wish to make changes to your profile, you can jump to the section that needs to be changed, make the changes, and save immediately without scrolling down to the bottom of the page.

### Work Address

[Go to top](#)

Company Name

Assigned Location

Street

Address same as assigned location

City

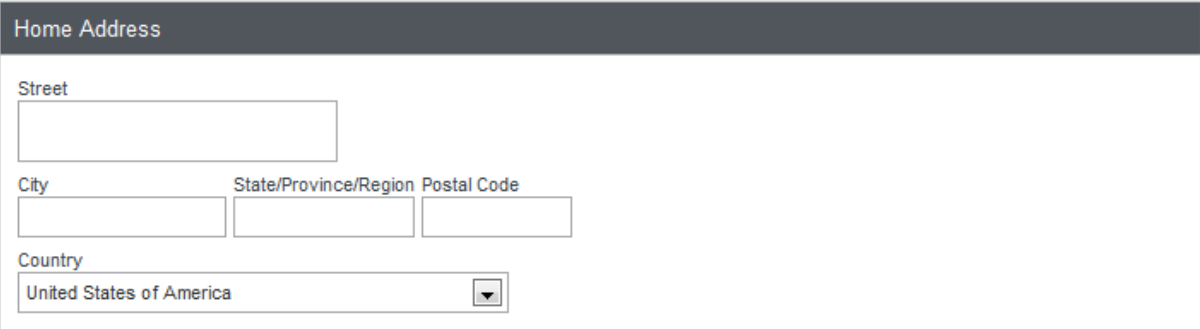
State/Province/Region

Postal Code

Country

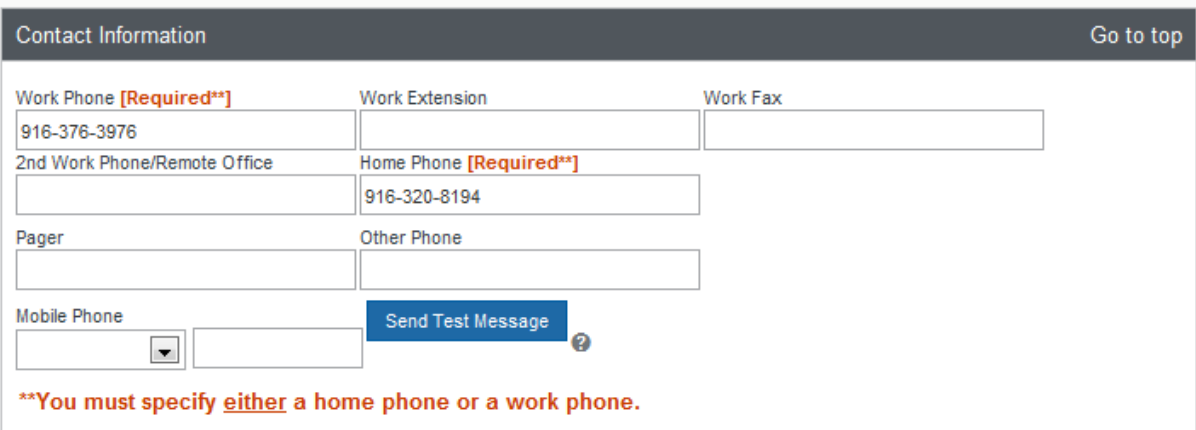
Save

The next section is your work address. This is the physical address of the department where you work. If you work in a satellite office it is your office's address, not the department headquarters.



The screenshot shows a form titled "Home Address" with a dark header. Below the header are several input fields: a large text box for "Street", three smaller text boxes for "City", "State/Province/Region", and "Postal Code", and a dropdown menu for "Country" currently set to "United States of America". A blue "Save" button is located at the bottom right of the form area.

Your home address is not a required field.



The screenshot shows a form titled "Contact Information" with a dark header and a "Go to top" link in the top right corner. The form contains several input fields: "Work Phone [Required\*\*]" with the value "916-376-3976", "Work Extension", "Work Fax", "2nd Work Phone/Remote Office", "Home Phone [Required\*\*]" with the value "916-320-8194", "Pager", "Other Phone", and "Mobile Phone" with a dropdown menu. A blue "Send Test Message" button with a question mark icon is positioned next to the Mobile Phone field. A red error message at the bottom states: "\*\*You must specify either a home phone or a work phone." A blue "Save" button is at the bottom right.

When entering your contact information it is necessary to enter AT LEAST your work phone number or your home phone number. You may enter both, or you may substitute your cell phone number for your home number.

Email Addresses
Go to top

Please add at least one email address.

[▶ How do I add an email address?](#)

[\[+\] Add an email address](#)

Email 1	Contact?
tasha.wilson@dgs.ca.gov	Yes

Your work email address (the one used as your log in) will automatically populate in the email address field. You have the option of being able to add more addresses. You can have your itinerary be sent to your manager, your personal email address, or even your spouse. If you are booking travel for someone else, they will automatically receive a copy.

Emergency Contact
Go to top

Name  Relationship

Street   Address same as employee

City  State/Province/Region  Postal Code

Country  Phone  Alternate Phone

[Save](#)

The emergency contact information is not a required field, but is preferred. On the offside chance there is an emergency, we would like to know who to contact on your behalf.

Travel Preferences
Go to top

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

AAA/CAA  Government  Military  Senior/AARP

Please select any discount programs you may belong to. But be prepared to show the proper identification/membership cards. If you choose a fare with an AARP discount, you will need to show your AARP membership card at the counter. The government discount refers to Federal Government rates, Concur automatically searches for the State rates.

### Air Travel Preferences

Seat	Special Meals	Ticket Delivery
Don't Care	Baby Meal	E-ticket when possible
Preferred Departure Airport	Other Air Travel Preferences	
SMF		
Medical Alerts		

Travel preference sections will allow the traveler to filter their searches by desired amenities as well as transmit any travel needs/requests to the vendor. Entering your preferred departure airport into your profile ensures it will automatically populate when searching for tickets. You will also be able to alter this in the search screen without returning to your profile. This section also gives you a chance to notify the airline of any medical restrictions you may have.

### Hotel Preferences

Room Type	Smoking Preference	Message to Vendor			
Don't Care	Non-smoking	<input type="checkbox"/> Foam pillows	<input type="checkbox"/> Rollaway bed	<input type="checkbox"/> Crib	
<b>I prefer hotel that has:</b>					
<input type="checkbox"/> a gym	<input type="checkbox"/> a pool	<input type="checkbox"/> a restaurant	<input type="checkbox"/> room service	<input type="checkbox"/> Early Check-in	
<b>Accessibility Needs</b>					
<input type="checkbox"/> Wheelchair access	<input type="checkbox"/> Blind accessible				

Your hotel preferences will make sure to highlight in the search results hotels that have amenities that match your needs.

### Car Rental Preferences




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

Car Type	Smoking Preference	Car Transmission	Message to Vendor		
Intermediate Car	Non-smoking	Don't Care	<input type="checkbox"/> In-car GPS system	<input type="checkbox"/> Ski rack	

As will your car rental preferences. Note that the state does not reimburse a traveler who rents a GPS system.


## Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs [+] Add a Program







 Hilton (All) (EH) Hilton HHonors	12345678	 
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The state follows Federal Guidelines allowing travelers to retain frequent traveler benefits for personal use. You may add any rewards programs you belong to. To add, click on the red “Add a program” button.

## Add Travel Programs

 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".




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.).

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

You can add up to 5 programs at a time in the popup box that produces. After adding your programs, click save at the bottom of the popup. If you have more than 5 rewards program numbers, you may click the “Add a program” link again to add any additional.

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs [+] Add a Program

 Hilton (All) (EH) Hilton HHonors	12345678	 
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To change or delete the program number(s) please click on the pencil (edit) or the red “X” (delete) next to the rewards card.

#### Southwest Ticket Credits

+ Add ticket credit

If you have any pending southwest ticket credits from before you created your Concur profile, you can enter them by clicking on “Add ticket credit”

**? Add ticket credit**

Southwest Record Locator:   
(Required)

Valid Until:

Ticket Amount:   
US-Dollar (\$)

Any credits accrued for trips booked and cancelled through Concur will be automatically tracked by the system.

### TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender **[Required]**  Male  Female

Date of Birth (mm/dd/yyyy) **[Required]**

DHS Redress No.

TSA Pre✓ Known Traveler Number

Your birthdate and gender are required information for the TSA, and if you have a TSA Pre Check Known Traveler Number, you are welcome to enter it. If you should chose to participate in the Pre Check program, please note it is a non-reimbursable expense.

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.

### Passports

I do not have a passport

### International Visas

[\[+\] Add a Visa](#)

[Save](#)

If you have a passport or visa, you are welcome to add the information.

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.

Refuse Self Assigning Assistants [?](#)

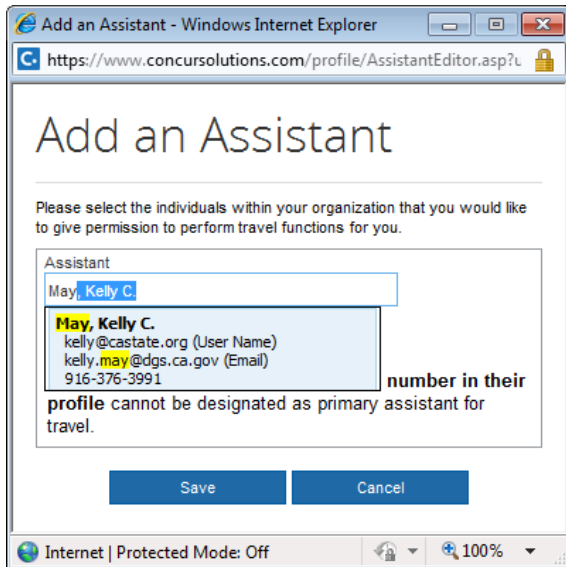
### Your Assistants and Travel Arrangers

[\[+\] Add an Assistant](#)

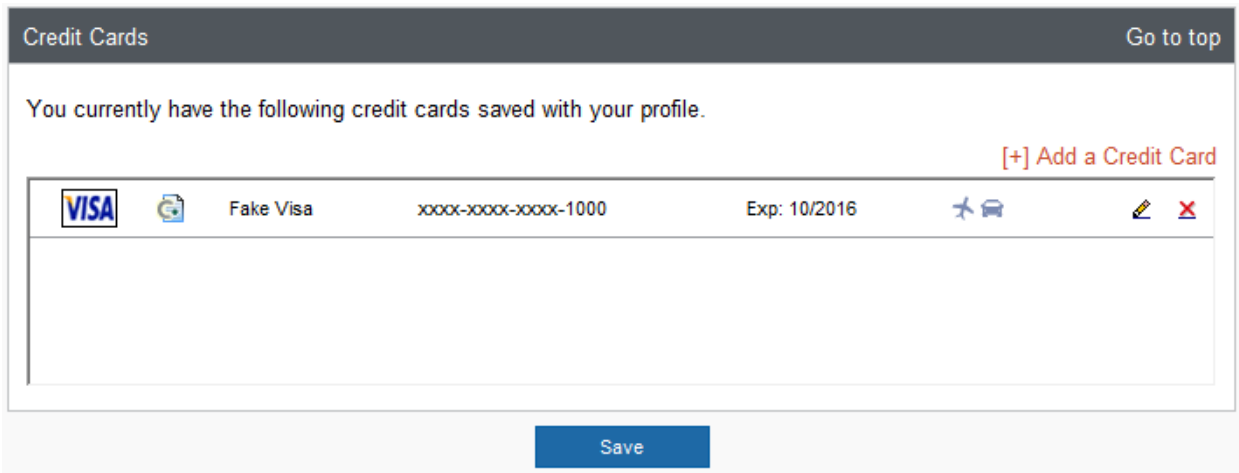
Francis, Melody A. (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	<a href="#">✎</a> <a href="#">✖</a>
May, Kelly C.	Can book travel? <input checked="" type="checkbox"/>	<a href="#">✎</a> <a href="#">✖</a>
Wilson, Tasha L.	Can book travel? <input checked="" type="checkbox"/>	
LaMarca, Anthony G.	Can book travel? <input checked="" type="checkbox"/>	<a href="#">✎</a> <a href="#">✖</a>

[Save](#)


You can have as many travel assistants as you want, but only one can be your primary assistant. Assistants are authorized to book travel on your behalf. You can add an assistant by clicking the “Add an Assistant” link.




The add an assistant popup window operates the similarly to Microsoft Outlook. You type in the person's name and it brings up their information. Whomever you choose to be your travel assistant MUST have a Concur profile before you can search for and choose them.




The final section to enter is your credit card information. The flight and rental car are billed to your department, but your credit card is needed to hold any hotel rooms. Your credit card information will be encrypted. Once it is entered even you don't have access to it.

Profile ▾ 

 **Tasha LaRae Wilson**

[Profile Settings](#) | [Sign Out](#)

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 Administer for another user...

I am a delegate or travel assistant

I am a self-assigning travel arranger

[Cancel](#) [Apply](#)

Once your profile is complete, if you want to make any changes you would need to click on the down arrow next to “profile” in the upper right corner of the home page, and select “Profile Settings”.