Creating a Concur Profile – Step by step guide:

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.

C. CONCUR

Login

User Name [   ]

Password [   ]

☐ Remember user name on this computer

[Login]

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 and clicking on the concur link for access to the log in screen
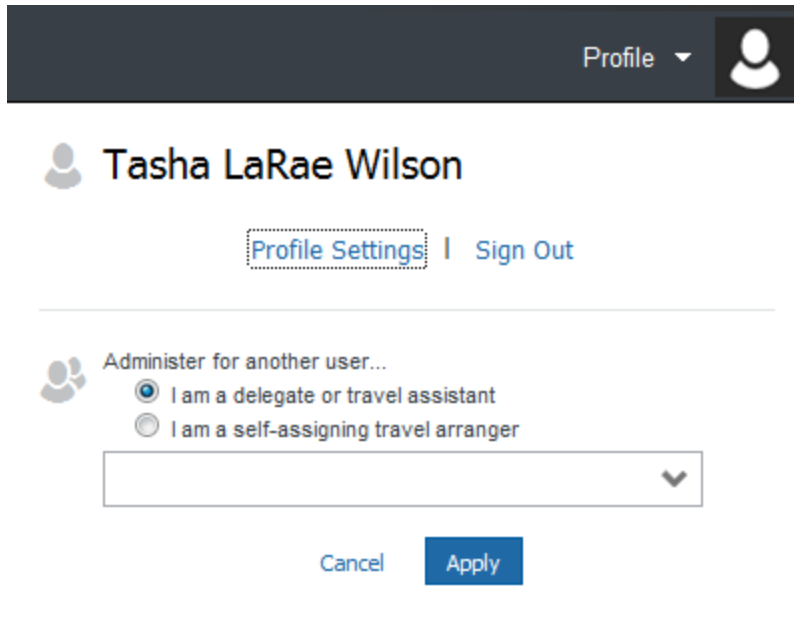
When you log in you will be brought to the home page. In the upper right hand corner click on the down arrow next to "profile" and select "Profile Settings".

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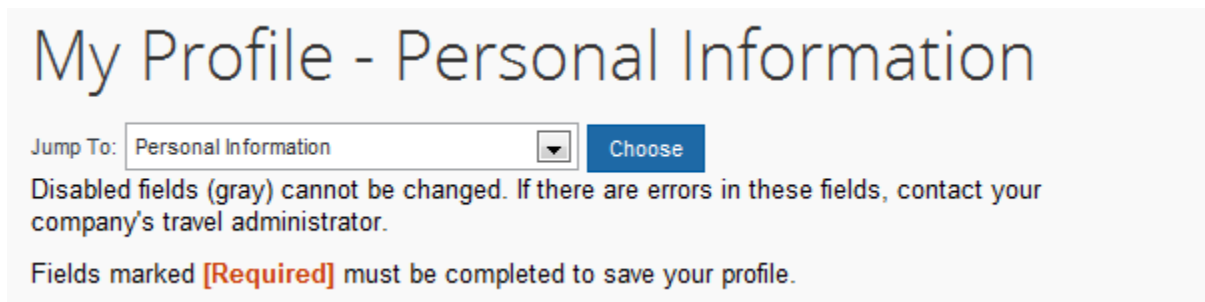
When you enter your name, it is important that you enter it EXACTLY how it shows on your photo identification, such as your driver's license. The name you enter here is how your name will be printed on your ticket.

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
	Tasha	LaRae		Wilson	

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
TravelStore - State of California | Please choose a company location.

Street

☐ Address same as assigned location

City | State/Province/Region | Postal Code

Country
United States of America
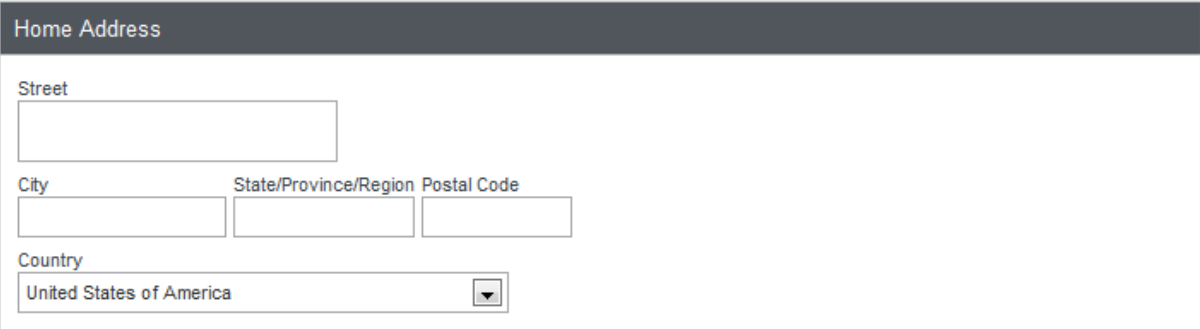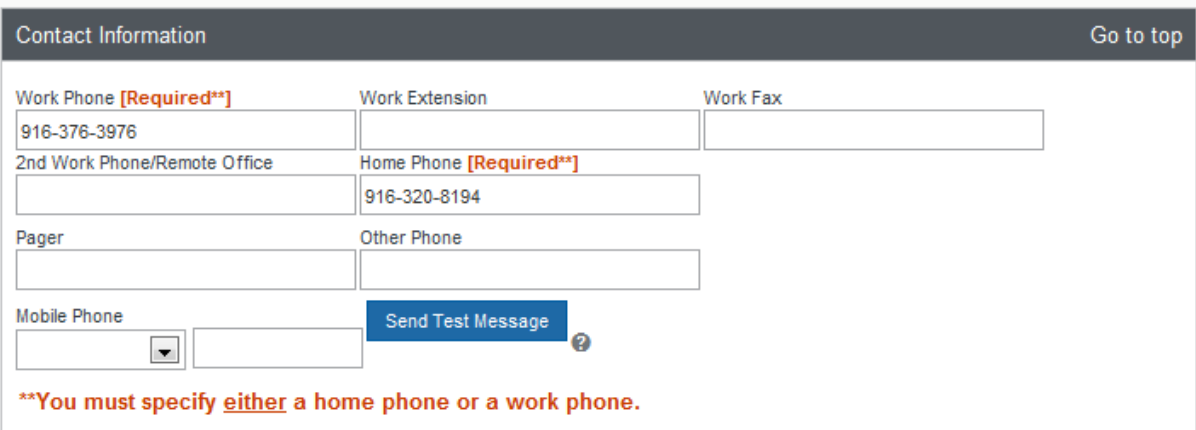
Save

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.

Home Address

Street

City   State/Province/Region Postal Code

Country

United States of America

Save

Your home address is not a required field.

Contact Information   Go to top

Work Phone **[Required**]**   Work Extension   Work Fax

916-376-3976

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

                                 916-320-8194

Pager   Other Phone

Mobile Phone   Send Test Message

****You must specify _either_ a home phone or a work phone.**

Save

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.

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.

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.

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 ❓

SMF

Other Air Travel Preferences

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	☐ 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

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		
Intermediate Car	Non-smoking	Don't Care	☐ In-car GPS system	☐ Ski rack

Message to Vendor ❓

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

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

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.

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 ($)

Add ticket credit   Cancel

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.

Gender [Required]   Date of Birth (mm/dd/yyyy) **[Required]**   DHS Redress No. ❓   TSA Pre✓ Known Traveler Number ❓
○ Male ◉ Female   01/19/1969

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? ☑	✎ ✗
May, Kelly C.	Can book travel? ☑	✎ ✗
Wilson, Tasha L.	Can book travel? ☑	
LaMarca, Anthony G.	Can book travel? ☑	✎ ✗

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.
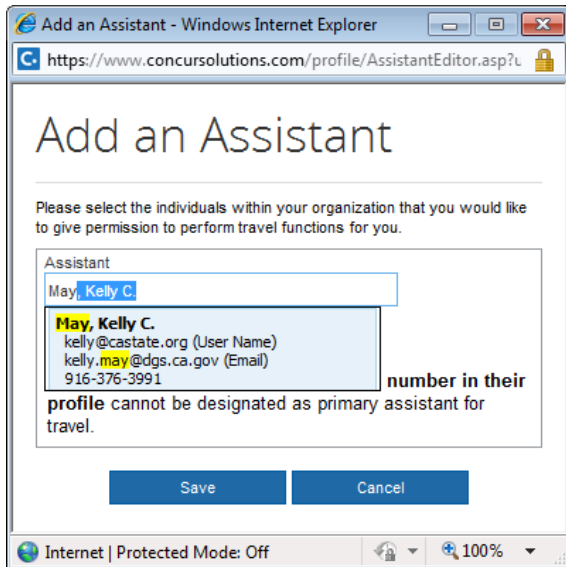
The add an assistant popup window operates the similarly to Microsoft Outlook. You type in the person's name and it brings up their information. Whomever you choose to be your travel assistant MUST have a Concur profile before you can search for and choose them.
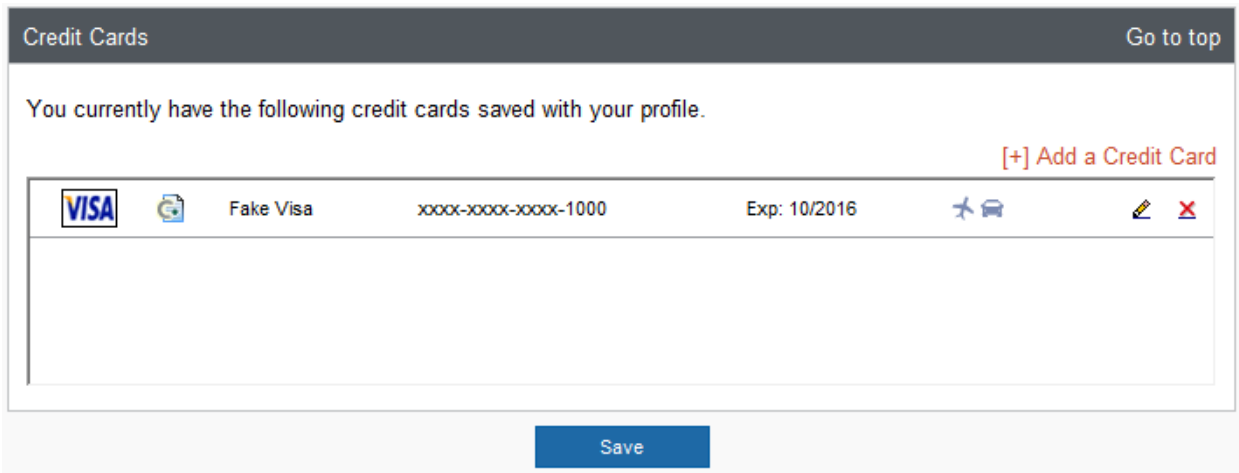
The final section to enter is your credit card information. The flight and rental car are billed to your department, but your credit card is needed to hold any hotel rooms. Your credit card information will be encrypted. Once it is entered even you don't have access to it.

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".