

Creating a Concur Profile: A Step-by-Step Guide

To begin, you will need a link from your department's travel coordinator that will bring you to the Concur login registration page. Fill out the required fields and submit the registration request.

**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)** ▼

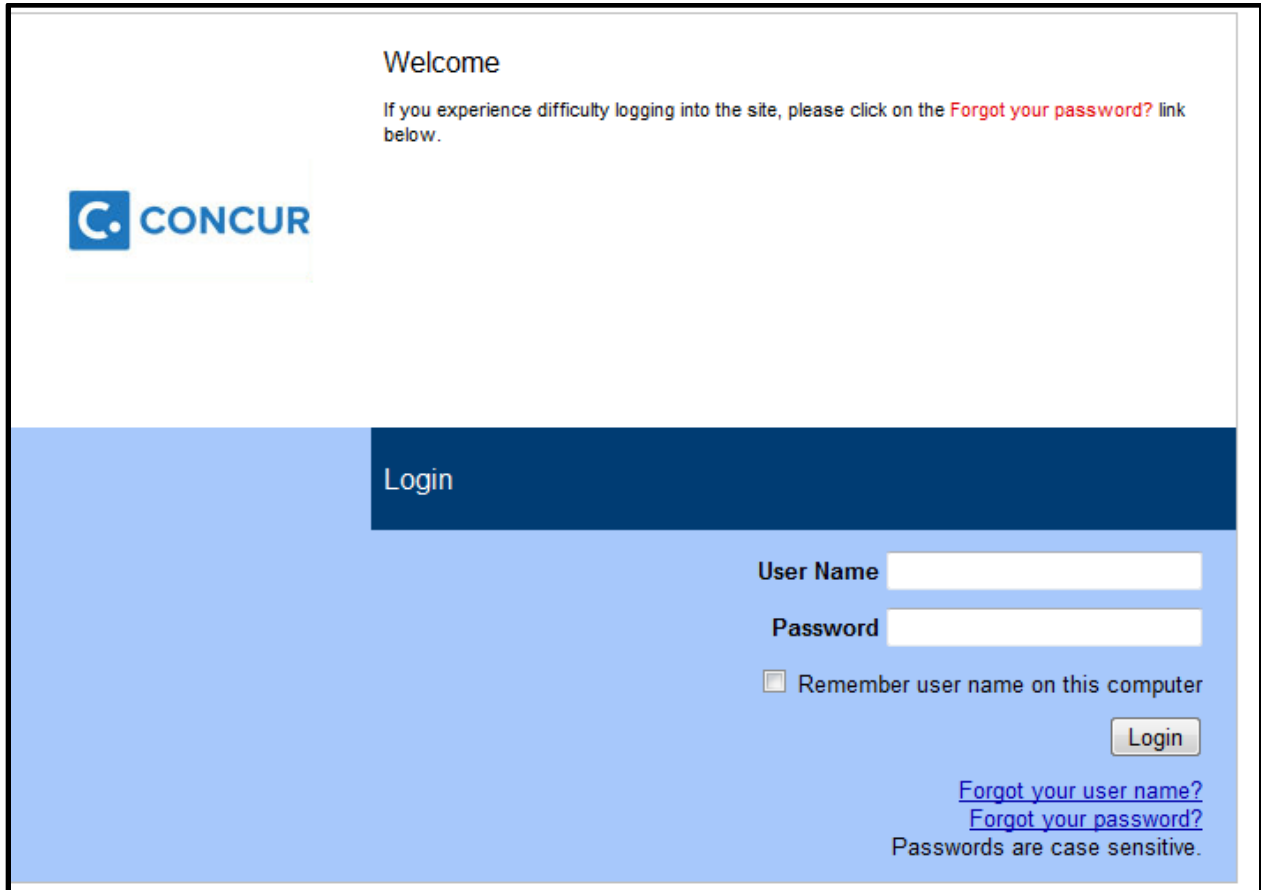
Date Format * **M/D/Y** ▼

* 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.

Once completed, you will receive two emails from Concur: one will be a “Welcome” email, and the second email 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 login screen.



Welcome

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



Login

User Name

Password

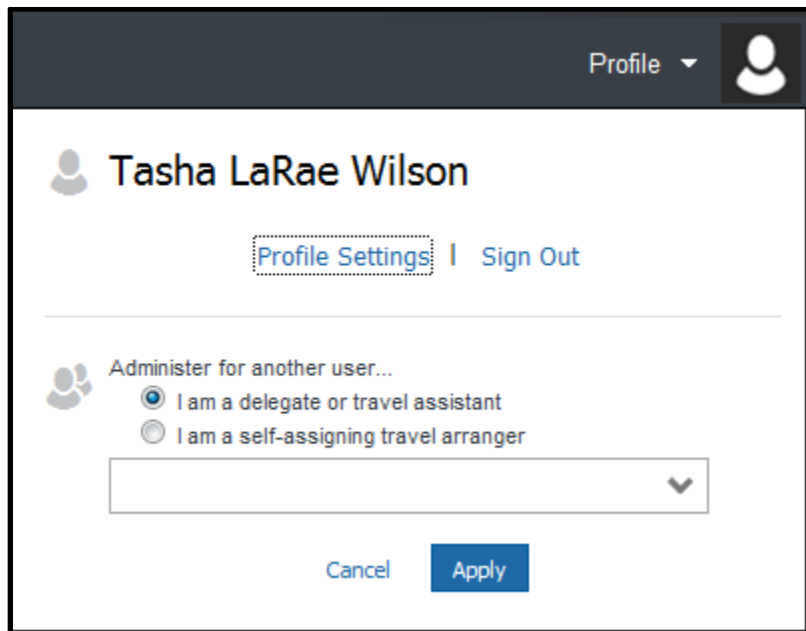
Remember user name on this computer

Login

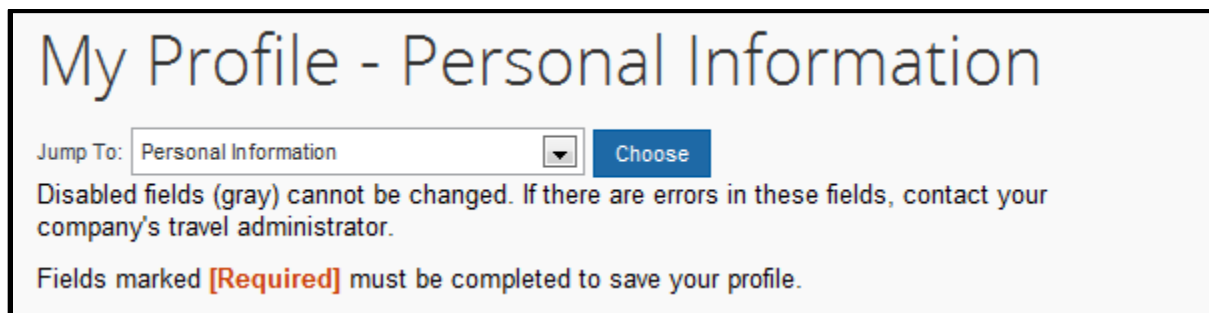
[Forgot your user name?](#)
[Forgot your password?](#)

Passwords are case sensitive.

When you login, 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 license. The name you enter here is how your name will be printed on your ticket.

If after you have saved your profile, you realized that you had a typo in the spelling of your name or in any other grayed-out area, you will need to contact the CalTravelStore 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
	<i>Tasha</i>	<i>LaRae</i>		<i>Wilson</i>	

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

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, after your profile is complete, you can go to any section that needs to be changed, make the change, and save immediately without scrolling down to the bottom of the page.

Company Information

Employee ID

Manager	Employee Position/Title	Org. Unit/Division

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, enter your office's address, not the department headquarters.

The screenshot shows a form titled "Work Address" with a "Go to top" link in the top right corner. The form contains the following fields:

- Company Name:** A text input field containing "TravelStore - State of California".
- Assigned Location:** A dropdown menu with the text "Please choose a company location." and a downward arrow.
- Street:** A text input field.
- Address same as assigned location:** A checkbox that is currently unchecked.
- City:** A text input field.
- State/Province/Region:** A text input field.
- Postal Code:** A text input field.
- Country:** A dropdown menu with "United States of America" selected and a downward arrow.

At the bottom center of the form is a blue "Save" button.

Your home address is not a required field.

The screenshot shows a form titled "Home Address". The form contains the following fields:

- Street:** A text input field.
- City:** A text input field.
- State/Province/Region:** A text input field.
- Postal Code:** A text input field.
- Country:** A dropdown menu with "United States of America" selected and a downward arrow.

At the bottom center of the form is a blue "Save" button.

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.

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](#)


Your work email address (the one used as your login) 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.

Email Addresses Go to top

Please add at least one email address.

[▶ How do I add an email address?](#)

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

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

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

The screenshot shows a form titled "Emergency Contact" with a "Go to top" link in the top right corner. The form contains several input fields: "Name" (text box), "Relationship" (dropdown menu), "Street" (text box with a dashed border), "City" (text box), "State/Province/Region" (text box), "Postal Code" (text box), "Country" (dropdown menu with "United States of America" selected), "Phone" (text box), and "Alternate Phone" (text box). A checkbox labeled "Address same as employee" is checked. A blue "Save" button is located at the bottom center of the form.

Please select any discount programs you may belong to, but be prepared to show the proper identification/membership cards. If you choose a rate 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.

The screenshot shows a form titled "Travel Preferences" with a "Go to top" link in the top right corner. Below the title is a section titled "Eligible for the following discount travel rates/fare classes" with a light gray background. This section contains four checkboxes: "AAA/CAA", "Government", "Military", and "Senior/AARP".

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.

The screenshot shows the 'Air Travel Preferences' section. It includes three dropdown menus: 'Seat' (set to 'Don't Care'), 'Special Meals' (set to 'Baby Meal'), and 'Ticket Delivery' (set to 'E-ticket when possible'). Below these are two text input fields: 'Preferred Departure Airport' (containing 'SMF') and 'Other Air Travel Preferences'. At the bottom is a 'Medical Alerts' text input field.

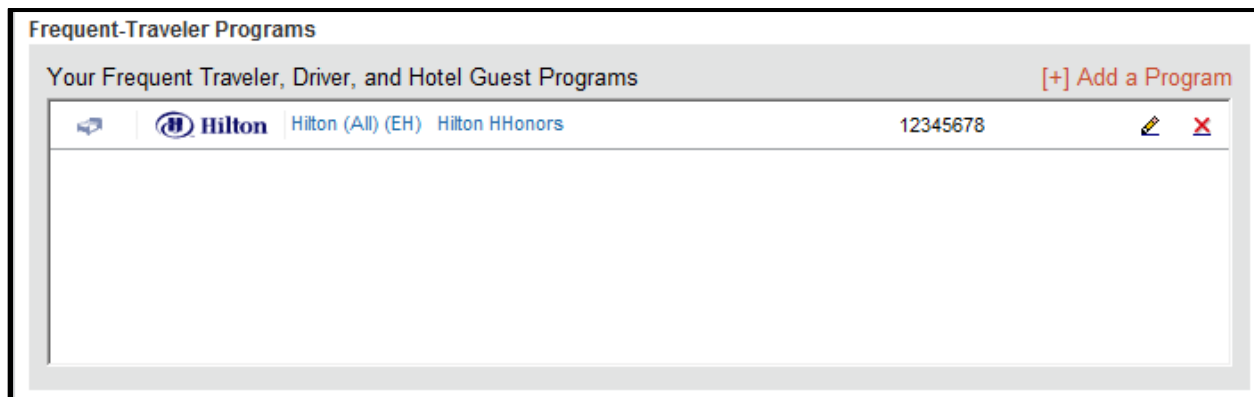
Your hotel preferences will make sure to highlight hotels that have amenities that match your needs in the “search results” section.

The screenshot shows the 'Hotel Preferences' section. It features a 'Room Type' dropdown (set to 'Don't Care') and a 'Smoking Preference' dropdown (set to 'Non-smoking'). There are three checkboxes: 'Foam pillows', 'Rollaway bed', and 'Crib'. A 'Message to Vendor' text input field is also present. Below this is a section titled 'I prefer hotel that has:' with checkboxes for 'a gym', 'a pool', 'a restaurant', 'room service', and 'Early Check-in'. At the bottom is an 'Accessibility Needs' section with a wheelchair icon and checkboxes for 'Wheelchair access' and 'Blind accessible'.

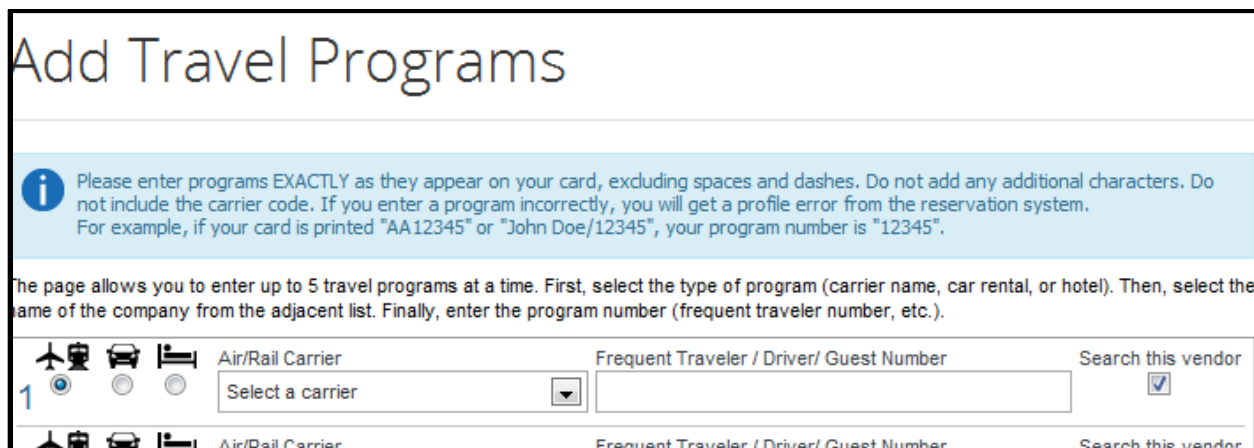
Your car preferences will also be reflected in the “search results” section. Note that the state does not reimburse a traveler who rents a GPS system.

The screenshot shows the 'Car Rental Preferences' section. It starts with a note: 'State of California does not reimburse for Navigational systems (GPS)'. Below this are three dropdown menus: 'Car Type' (set to 'Intermediate Car'), 'Smoking Preference' (set to 'Non-smoking'), and 'Car Transmission' (set to 'Don't Care'). There are two checkboxes: 'In-car GPS system' and 'Ski rack'. At the bottom is a 'Message to Vendor' text input field.

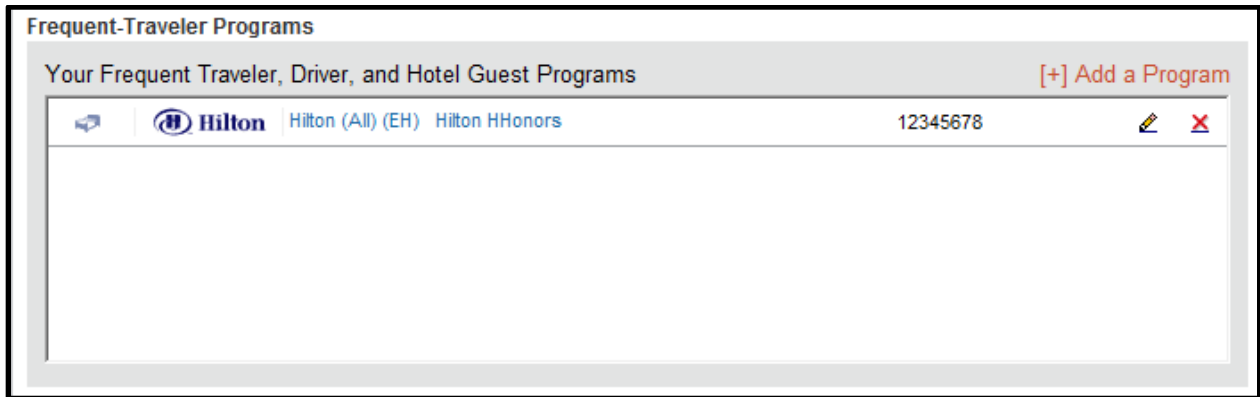
The state follows federal guidelines allowing travelers to retain frequent traveler benefits for personal use. You may add any of your rewards programs. To add, click on the red “Add a Program” button.



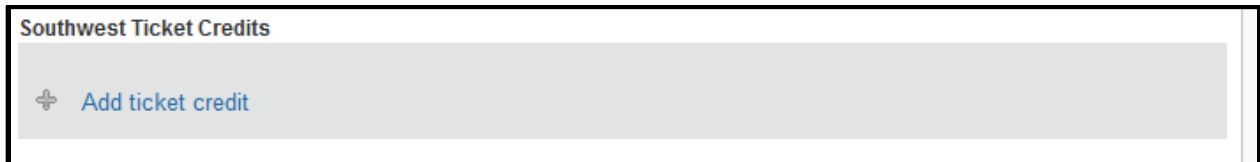
You can add up to five (5) programs at a time in the popup box. After adding your programs, click “save” at the bottom of the popup. If you have more than five (5) rewards program numbers, you may click the “Add a Program” link again to add any additional numbers.



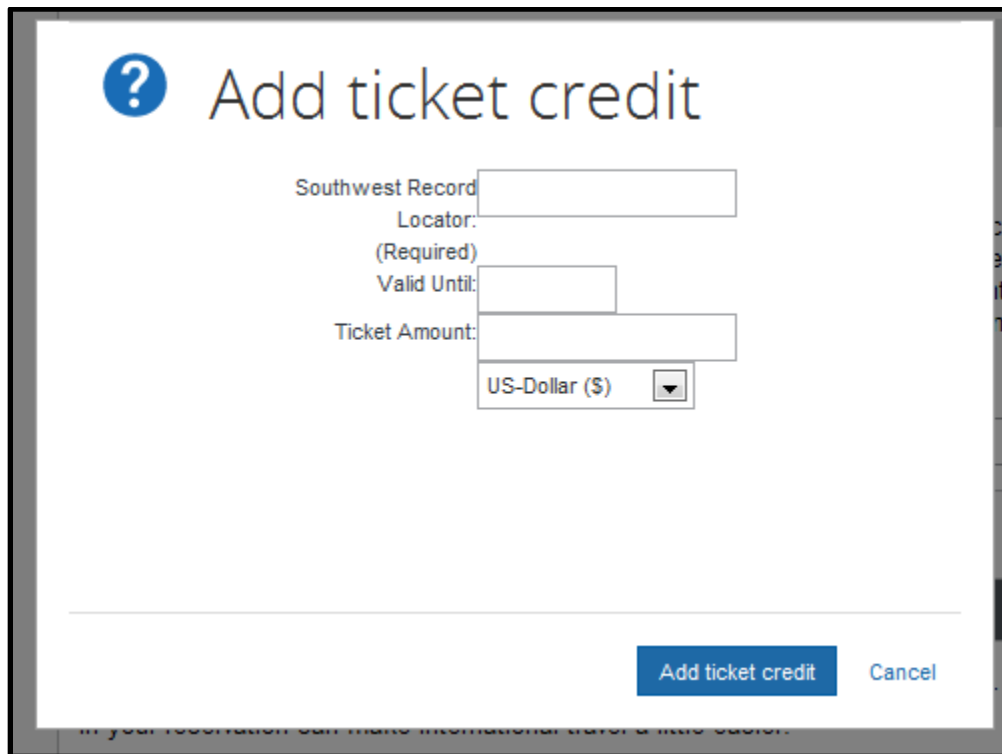
To change or delete the program number(s), please click on the pencil (edit) or the red “X” (delete) next to the rewards card.



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.”



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

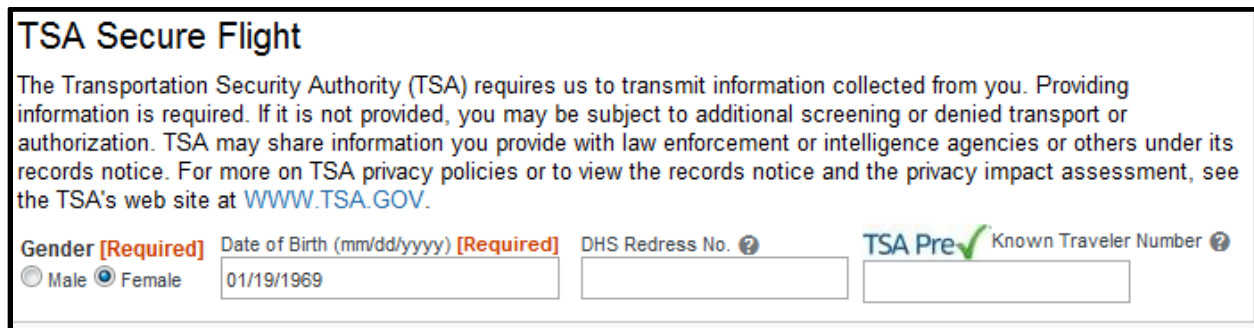


The screenshot shows a web form titled "Add ticket credit" with a blue question mark icon. The form contains the following fields:

- Southwest Record Locator: (Required) [Text input]
- Valid Until: [Text input]
- Ticket Amount: [Text input]
- Currency: US-Dollar (\$) [Dropdown menu]

At the bottom right of the form are two buttons: "Add ticket credit" (blue) and "Cancel" (grey).

Your gender and date of birth are required information for the TSA, and if you have a TSA PreCheck Known Traveler Number, you are welcome to enter it. If you should choose to participate in the PreCheck program, please note it is a non-reimbursable expense.



The screenshot shows the "TSA Secure Flight" section of a form. It includes a disclaimer and several input fields:

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] Male Female

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

DHS Redress No. ?

TSA Pre✓ Known Traveler Number ?

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

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](#)

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.

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 [?](#)

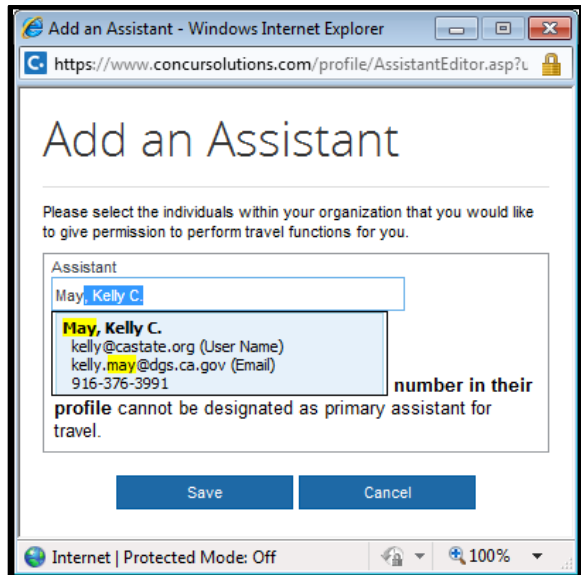
Your Assistants and Travel Arrangers

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

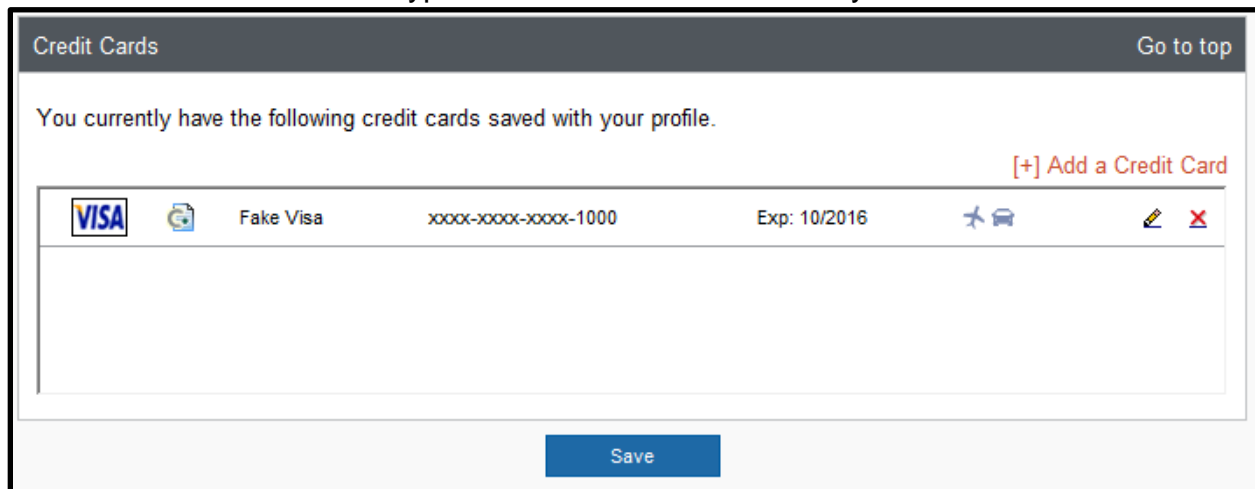
Francis, Melody A. (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	✎ ✖
May, Kelly C.	Can book travel? <input checked="" type="checkbox"/>	✎ ✖
Wilson, Tasha L.	Can book travel? <input checked="" type="checkbox"/>	
LaMarca, Anthony G.	Can book travel? <input checked="" type="checkbox"/>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

[Save](#)

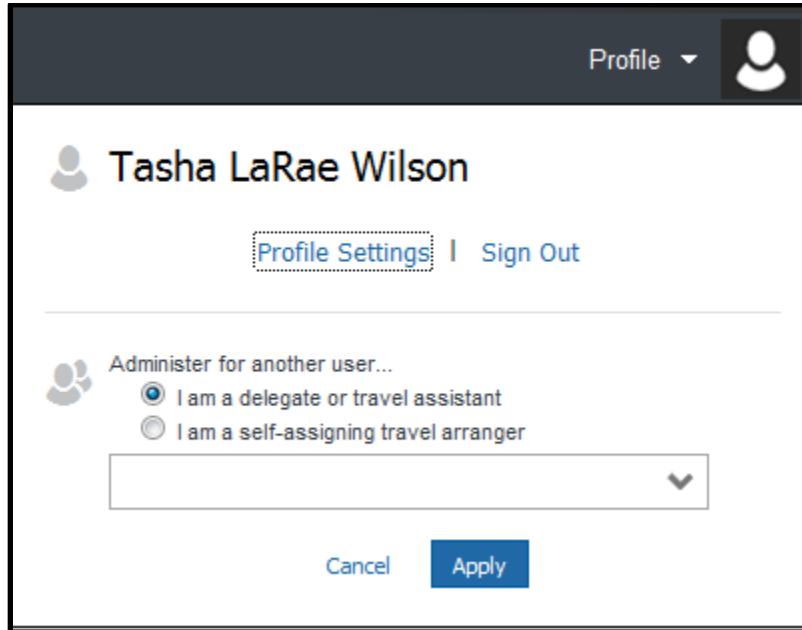
The “Add an Assistant” popup window operates similarly to Microsoft Outlook. Type the person’s name and it brings up their information. Whomever you choose to be your travel assistant **MUST** have a Concur Profile before you can search for and choose them.




The final section 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 will need to click on the down arrow next to “Profile” in the upper right corner of the home page, and select “Profile Settings.”




The screenshot shows a user profile page for Tasha LaRae Wilson. At the top right, there is a 'Profile' dropdown menu and a user icon. Below the name, there are two links: 'Profile Settings' (which is highlighted with a dashed red box) and 'Sign Out'. A horizontal line separates this header from the main content area. Under the heading 'Administer for another user...', there are two radio button options: 'I am a delegate or travel assistant' (which is selected) and 'I am a self-assigning travel arranger'. Below these options is a text input field with a downward arrow on the right side. At the bottom of the form, there are two buttons: 'Cancel' and 'Apply'.

Profile ▾ 

 **Tasha LaRae Wilson**

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

 Administer for another user...

I am a delegate or travel assistant

I am a self-assigning travel arranger

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