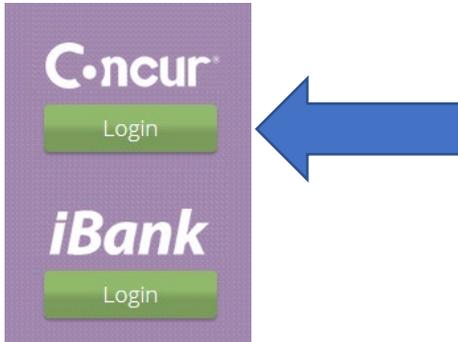


## Cal Travel Store Profile Set Up

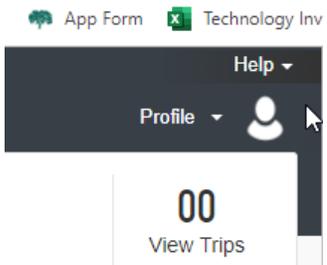
1. Go to the Concur Travel login site which is located at [www.caltravelstore.com](http://www.caltravelstore.com)
2. Click on the Concur login.



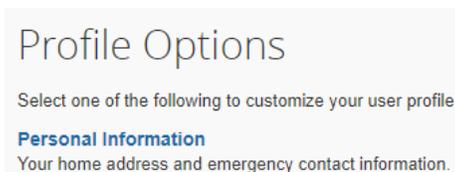
3. Sign in with your user name and password.

The screenshot shows the SAP Concur Sign In page. At the top left is the 'SAP Concur' logo. The main heading is 'Sign In'. Below it are two input fields: 'User Name' and 'Password', each with a small eye icon to toggle visibility. There is a checkbox labeled 'Remember user name on this computer'. A red 'Sign In' button is positioned to the right of the password field. At the bottom left, there are links for 'Forgot your user name?' and 'Forgot your password?'. The background features a light blue sky with clouds and a silhouette of a bird in flight.

4. Click on Profile in the upper-right hand corner.



5. Click on Profile Settings to continue.
6. Select profile options to customize your profile. Start with Personal Information.



7. Disabled fields in gray cannot be changed. If there are errors in these fields, please contact the DGS Statewide Travel Program at 916 376-3974.
8. Your first, middle and last name must be your legal name and be identical to the official photo identification that you will be presenting at the airport, such as a driver's license or passport. If you do not have a middle name on your identification or driver's license, check the "no middle name" button.
9. Proceed down the page, filling in the information. There are several Save buttons on the profile page; however, you only need to save once as every save button saves the entire profile. In the Company Information box, your work location is the only required field.

**Company Information**

Employee ID

Manager  Org. Unit/Division  Employee Position/Title

Work Location [Required]

**Save**

10. The next section is the Contact Information field. When entering your contact information, it is necessary to enter your work phone number **OR** your home phone number. You may substitute your cell phone number for your home number. 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 email addresses. If you have a primary travel arranger assigned in your profile, they will automatically receive a copy of your itinerary.

**Contact Information**

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

Home Phone [Required\*\*]

Pager  Other Phone

Mobile Phone Country/Region  Mobile Phone

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

**Save**

11. The next section is Travel Preferences. You may select any discount programs you belong to. But be prepared to show the proper membership cards. If you choose a rate with a AAA discount, you will need to show your AAA membership card at the counter. The government discount refers to federal government rates; Concur automatically searches for the state government rates. Next, you can select your seat preference, your seat section, your meal preference\* (if offered by the airline), and your preferred departure airport. Entering your preferred departure

airport into your profile ensures it will automatically populate when searching for tickets. This section also gives you a chance to notify the airline of any medical restrictions you may have. **\*We recommend that you do not set up your meal preferences at this time, as bugs in the system are still being worked out.**

- You can now select your hotel preferences- room type, amenities, and accessibility needs. Your hotel preferences will be highlighted in the hotel search results. Next are the car rental preferences. Please keep in mind that in the State of California travel policy compact and intermediate are still the preferred car rental classes, and the State Controller’s Office will not reimburse GPS systems.

**Hotel Preferences**

Room Type:  Smoking Preference:   Foam pillows  Rollaway bed  Crib  Message to Hotel Vendor [?](#)

I prefer hotel that has:  
 a gym  a pool  a restaurant  room service  Early Check-in

**Accessibility Needs**  
 Wheelchair access  Blind accessible

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**Car Rental Preferences**

Car Type:  Smoking Preference:  Car Transmission:   In-car GPS system  Ski rack

Message to Car Rental Vendor [?](#)

- The next section allows you to add your frequent traveler programs. The State of California follows federal guidelines allowing travelers to retain frequent traveler benefits for personal use. These programs will automatically attach your frequent air, car and hotel rewards to any reservations made. Please ensure your name on your rewards program matches the legal name you’ve stored in the Concur profile. Click on the Add a Program button on the right. Select the plane, car or hotel bed icons. Select the appropriate vendor from the drop-down menu, insert your reward number, and click Save. You can enter 5 traveler reward programs at a time. Click on the Add a Program link again to add additional reward numbers.

Add Travel Programs

**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".

The page allows you to enter up to 5 advantage programs at a time. Select the name of the company followed by the program number and the card expiration date.

1	Air/Rail Carrier <input type="text" value="Select a carrier"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>
2	Air/Rail Carrier <input type="text" value="Select a carrier"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>
3	Air/Rail Carrier <input type="text" value="Select a carrier"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>
4	Air/Rail Carrier <input type="text" value="Select a carrier"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>
5	Air/Rail Carrier <input type="text" value="Select a carrier"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>

14. The next section is for Southwest Ticket Credits. 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 stored in the system.
15. Next, your gender and date of birth are required information for the TSA, and if you have a TSA Pre Check known traveler number, you can enter it here. If you should choose to participate in this TSA Pre Check program, please note it is a non-reimbursable expense. If you do any international travel, there is an area for you to manage your passport and VISA. Adding your passport information to your profile will allow us to include it in your reservations.

### 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]    Date of Birth (mm/dd/yyyy) [Required]    DHS Redress No. ?    **TSA Pre** Known Traveler Number ?

Male     Female    
     
    

**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** + Add a Passport

I do not have a passport

**International Visas** + Add a Visa

16. The next section is the Assistants and Travel Arrangers section. If there is someone within your department that you want to give permission to book travel for you, click on the Add an Assistant button on the right. Your assistant must have an existing Concur account before you can add him or her to your profile. Once you click on the Add an Assistant button, a pop-up box will display. Input the travel assistant's last name or email address to search for them. Select the appropriate name from the drop-down list. Make sure you select at least one of the two options provided: "can book travel for me" and/or "is my primary assistant for travel". You can have as many assistants as you would like to be able to book travel for you; but you can only have one primary assistant. Then click the Save button.

**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.

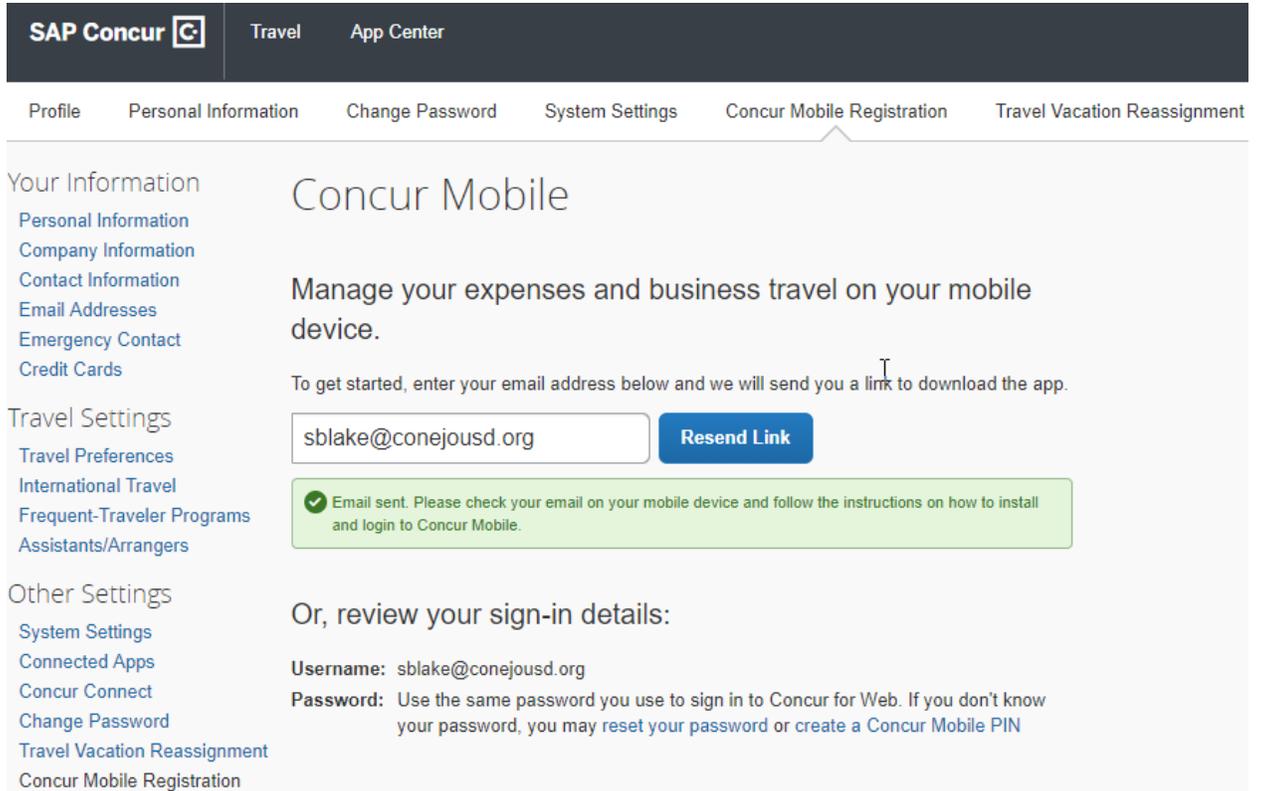
Refuse Self Assigning Assistants ?

**Your Assistants and Travel Arrangers** + Add an Assistant

Neverese, TravelStore (Do Not Delete)	Can book travel? <input checked="" type="checkbox"/>	<input type="text"/> <input type="text"/>
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17. If at any time you wish to make changes to your profile, login back into the profile, use the options on the left side of the screen to make the changes and save immediately without scrolling down to the bottom of the page.
18. If you have any issues booking your first travel arrangement, please call the Cal Travel Store. An authorized travel agent will be happy to assist you at **877-454-8785**. On your first call to an agent, it is a good idea to have them check to make sure that your profile was set up and saved correctly. If not, they will be able to tell you what information needs to be corrected.

19. You may also manage your travel on your mobile device. Click on the Concur Mobile Registration tab at the top of the page. Your email address should show in the box. Click on the Get Started button. You will get a message that shows an email has been sent to your mobile device and to follow the instructions.



The screenshot shows the SAP Concur user interface. At the top, there is a dark navigation bar with the SAP Concur logo and the text 'Travel App Center'. Below this is a horizontal menu with several options: 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Concur Mobile Registration' (which is highlighted with a white underline), and 'Travel Vacation Reassignment'. On the left side, there is a vertical sidebar with three main sections: 'Your Information' (containing links for Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, and Credit Cards), 'Travel Settings' (containing links for Travel Preferences, International Travel, Frequent-Traveler Programs, and Assistants/Arrangers), and 'Other Settings' (containing links for System Settings, Connected Apps, Concur Connect, Change Password, Travel Vacation Reassignment, and Concur Mobile Registration). The main content area is titled 'Concur Mobile' and contains the following text: 'Manage your expenses and business travel on your mobile device.' Below this, it says 'To get started, enter your email address below and we will send you a link to download the app.' There is a text input field containing 'sblake@conejousd.org' and a blue button labeled 'Resend Link'. A green notification box with a checkmark icon contains the text: 'Email sent. Please check your email on your mobile device and follow the instructions on how to install and login to Concur Mobile.' At the bottom of the main content area, it says 'Or, review your sign-in details:' followed by 'Username: sblake@conejousd.org' and 'Password: Use the same password you use to sign in to Concur for Web. If you don't know your password, you may reset your password or create a Concur Mobile PIN'.