

OCT
2024

How Does a Travel Coordinator Add a User to Concur?

Statewide Travel Program



Content

1. General Information 3

2. Self-Registration..... 4

 2.1 Setting up Self-Registration 4

 2.2 Approving Self-Registration 7

3. Manual Registration..... 8

4. Additional Resources.....10

1. General Information

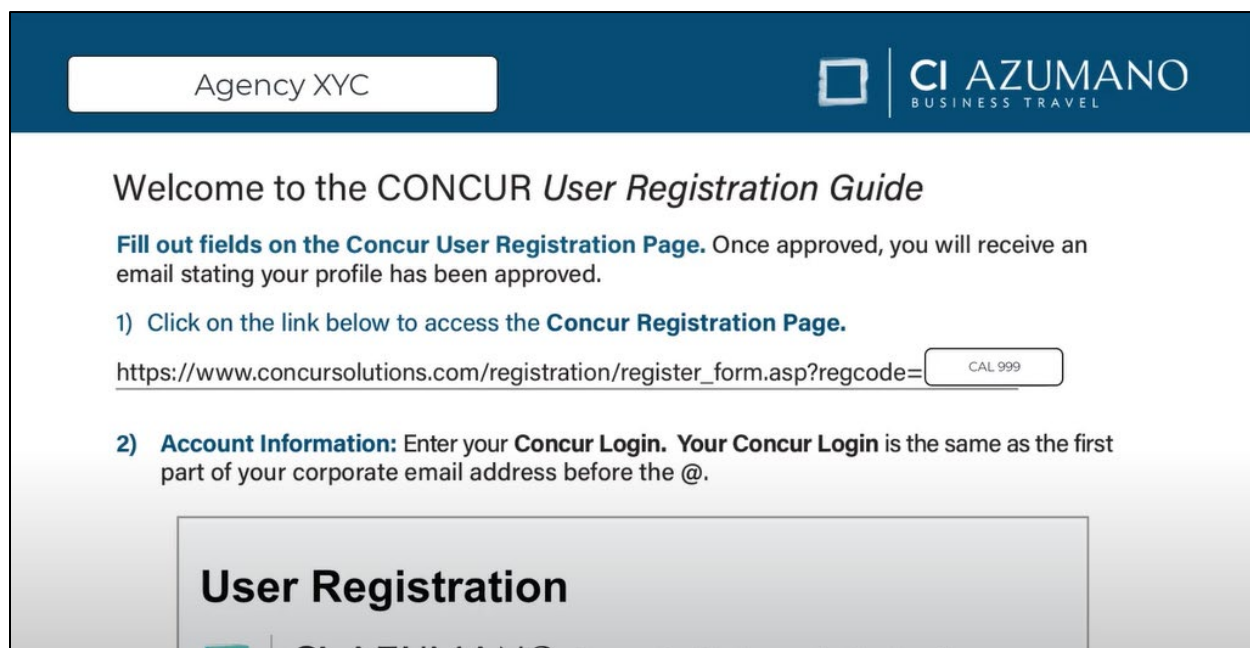
There are two ways a Travel Coordinator can create a profile on Concur: self-registration or manual registration.

2. Self-Registration

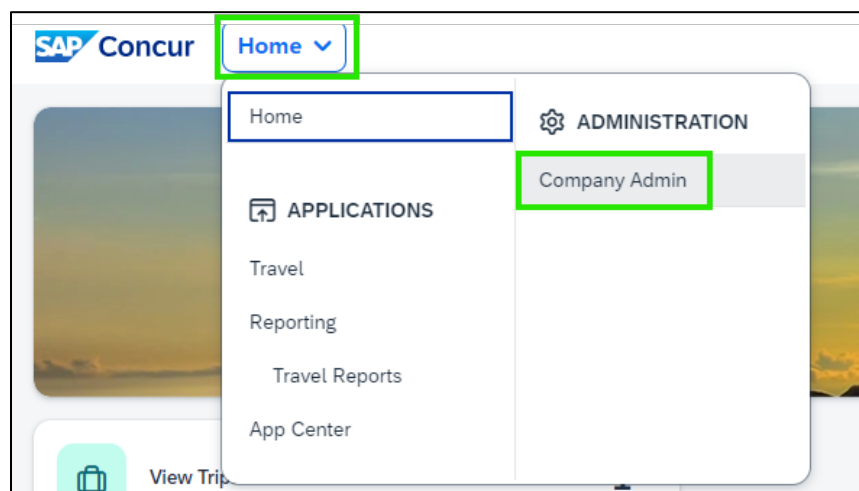
To create the self-registration set-up, you must have an administrative account in Concur. Please note: Not all agencies have self-registration set up.

2.1 Setting up Self-Registration

Once your agency has requested access to self-registration, the Travel Coordinator will receive a document from CI Azumano that will show you how to register. The document will look like this.

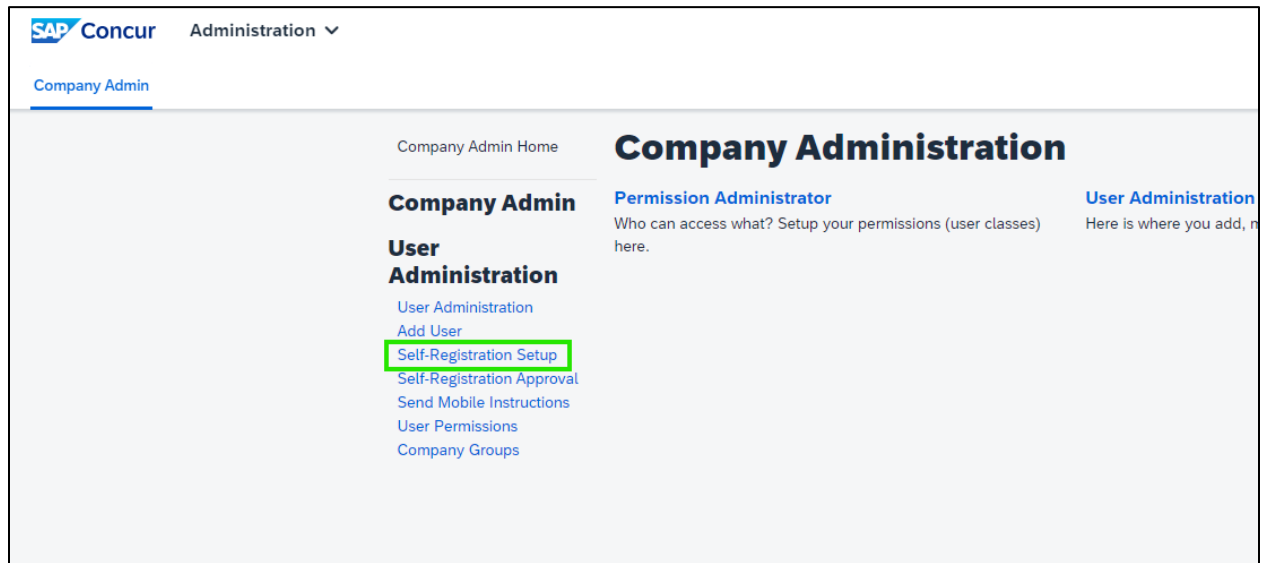


Once you have logged into Concur, click the 'Home' drop-down menu and choose 'Company Admin.'



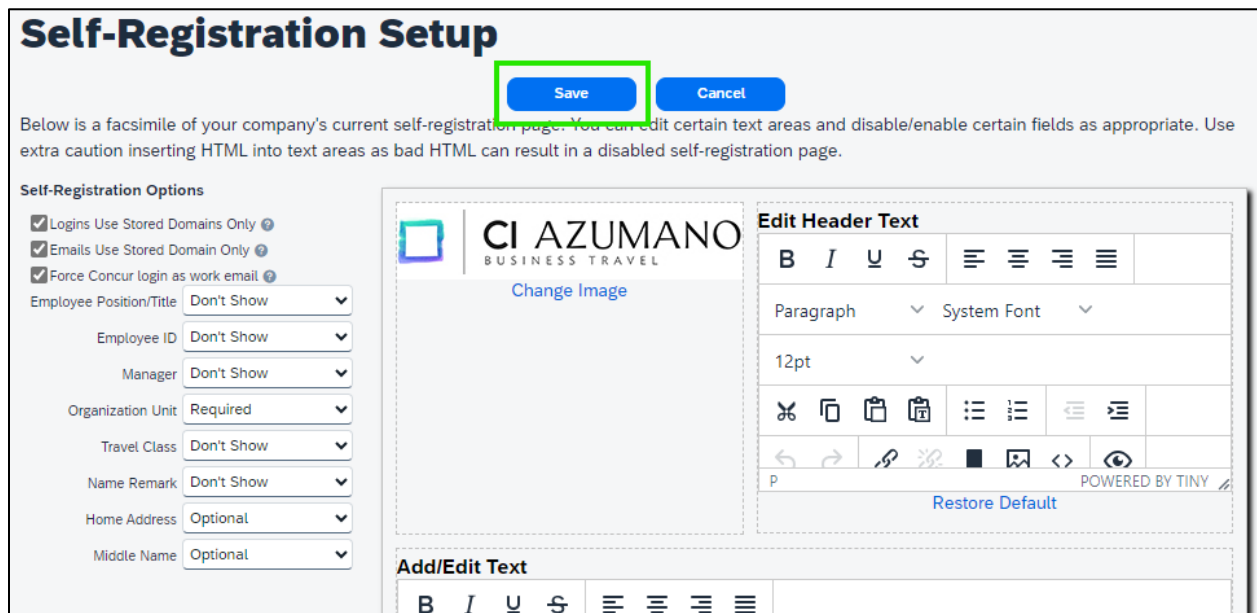
HOW DOES A TRAVEL COORDINATOR ADD A USER TO CONCUR?

Click 'Self-Registration Setup.'



The screenshot shows the SAP Concur Administration interface. The top navigation bar includes the SAP Concur logo and a dropdown menu for 'Administration'. Below this, the 'Company Admin' section is visible. The main content area is titled 'Company Administration' and contains three sub-sections: 'Company Admin', 'Permission Administrator', and 'User Administration'. Under 'User Administration', the 'Self-Registration Setup' link is highlighted with a green box. Other links in this section include 'User Administration', 'Add User', 'Self-Registration Approval', 'Send Mobile Instructions', 'User Permissions', and 'Company Groups'.

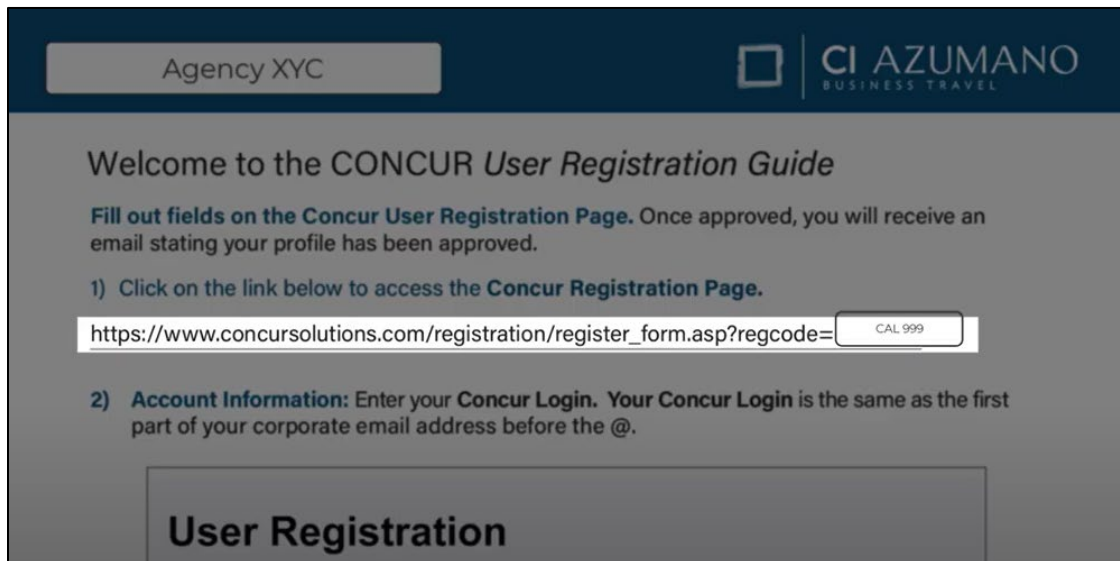
Update all relevant information. Once information is accurate, click the blue 'save' button.



The screenshot displays the 'Self-Registration Setup' page. At the top, there are two buttons: 'Save' (highlighted in green) and 'Cancel'. Below the buttons, a paragraph of text explains that the page is a facsimile of the company's current self-registration page and that users can edit certain text areas and fields. The page is divided into several sections: 'Self-Registration Options' on the left, which includes checkboxes for 'Logins Use Stored Domains Only', 'Emails Use Stored Domain Only', and 'Force Concur login as work email', along with dropdown menus for 'Employee Position/Title', 'Employee ID', 'Manager', 'Organization Unit', 'Travel Class', 'Name Remark', 'Home Address', and 'Middle Name'. The main content area features a header image for 'CI AZUMANO BUSINESS TRAVEL' with a 'Change Image' link. To the right of the header image is a rich text editor titled 'Edit Header Text' with various formatting options like bold, italic, underline, and text color. Below the header image is another rich text editor titled 'Add/Edit Text'.

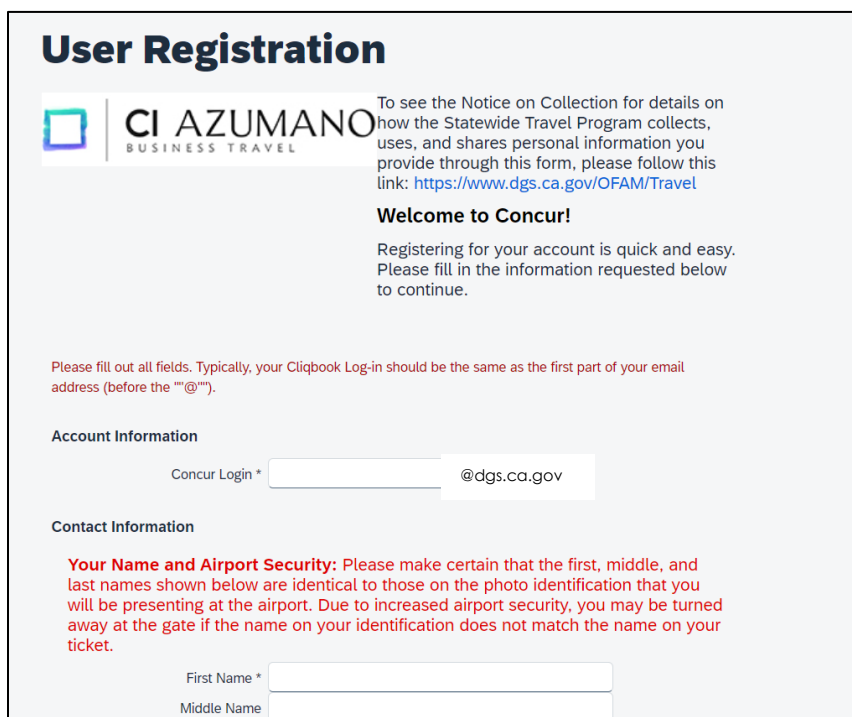
HOW DOES A TRAVEL COORDINATOR ADD A USER TO CONCUR?

Your self-registration is now set up; so, you can share the link given to you by CI Azumano to have your employees register under your agency.



The screenshot shows the top of a web page for "Agency XYZ" with the CI AZUMANO BUSINESS TRAVEL logo. The main heading is "Welcome to the CONCUR User Registration Guide". Below this, it instructs users to fill out fields on the registration page and provides a link: [https://www.concursolutions.com/registration/register_form.asp?regcode=](https://www.concursolutions.com/registration/register_form.asp?regcode=CAL 999) followed by a text box containing "CAL 999". The second instruction is "2) Account Information: Enter your Concur Login. Your Concur Login is the same as the first part of your corporate email address before the @." At the bottom, there is a large button labeled "User Registration".

When you send the link to the new user, they will see your agency specific version of this webpage. You will know it is the correct website because the domain will be related to your agency. For example, @dgs.ca.gov.

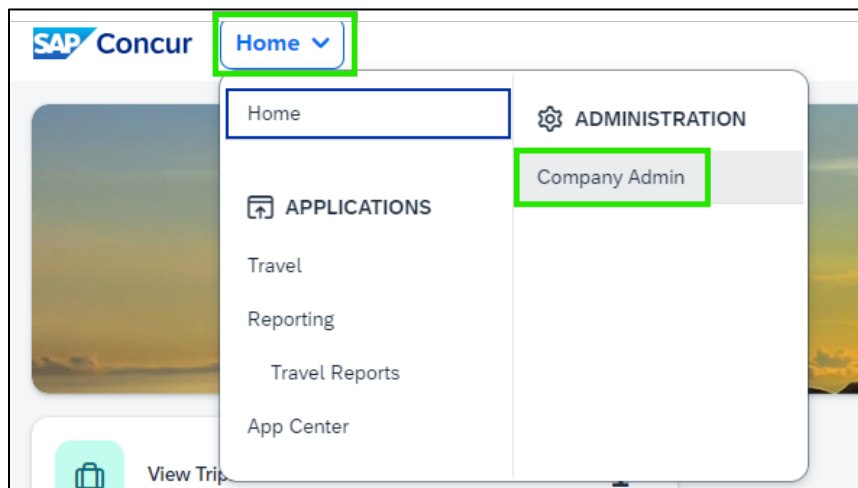


The form is titled "User Registration" and features the CI AZUMANO BUSINESS TRAVEL logo. It includes a notice about the Statewide Travel Program and a link to <https://www.dgs.ca.gov/OFAM/Travel>. The form is divided into sections: "Account Information" with a "Concur Login *" field and "@dgs.ca.gov" domain, and "Contact Information" with "First Name *" and "Middle Name" fields. A red warning message states: "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."

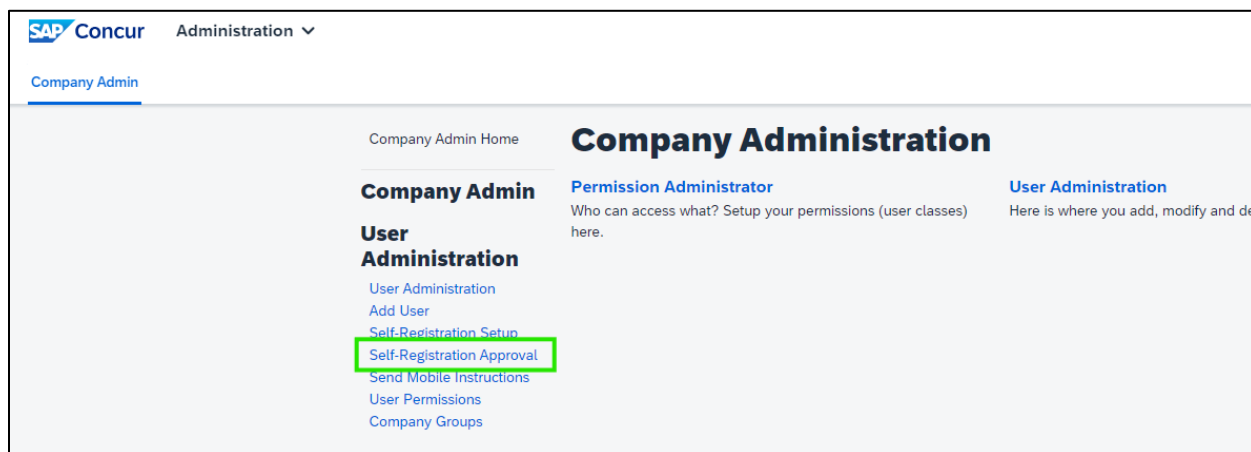
Please note: Travel Coordinators need to approve each self-registration.

2.2 Approving Self-Registration

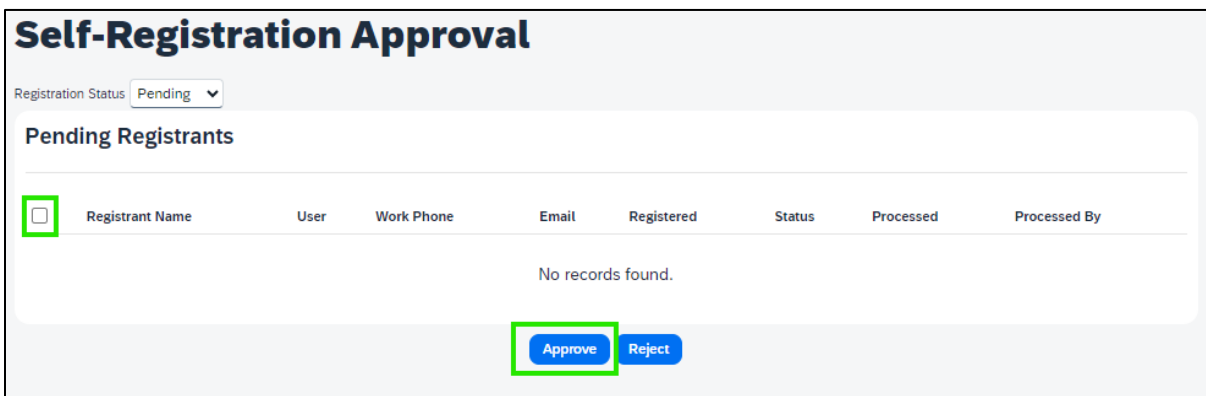
To approve traveler self-registrations: Click the 'Home' drop-down menu and choose 'Company Admin.'



On the left side of the 'Company Admin' page, click 'Self-Registration Approval.'

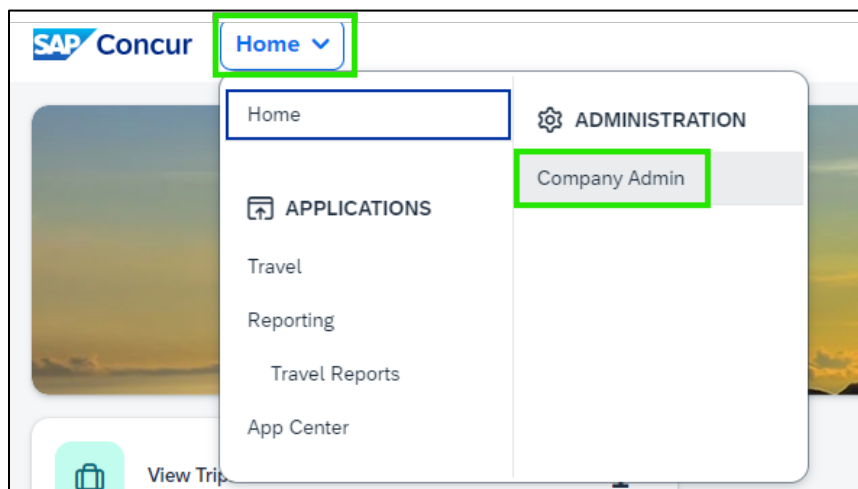


All Pending Registrants will be displayed and are approved by checking the box and clicking the blue 'Approve' button.

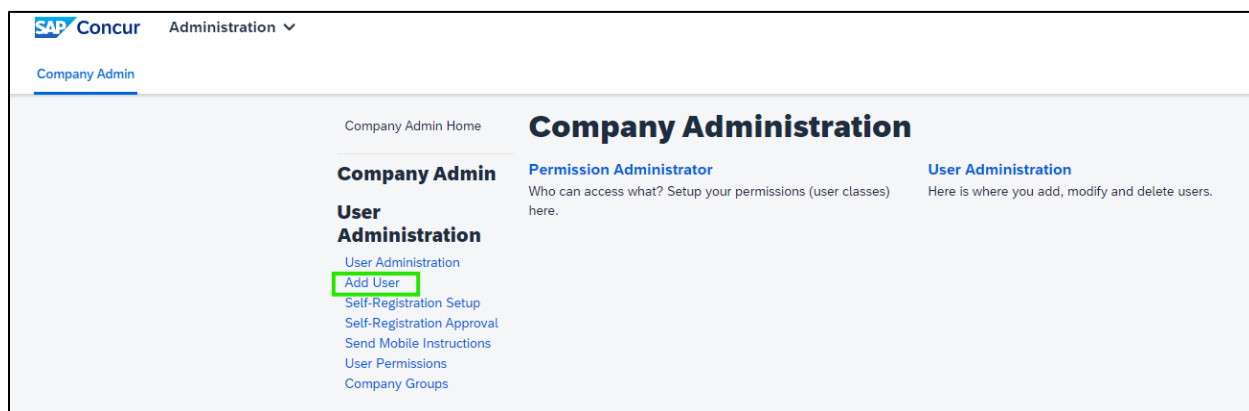


3. Manual

To manually register users for Concur, you must have an admin account in Concur. Once you have logged into Concur, click the 'Home' drop-down menu and choose 'Company Admin.'



Click 'Add User' and fill in the required information.



The CTE login name should have a domain that is related to your agency – for example, @dgs.ca.gov. Make sure the name input matches the photo identification the traveler will provide when traveling. An email is also required here. The email entered must be your official business email address.

A screenshot of the 'General Settings' form for adding a user. The form includes the following fields:

- CTE Login Name* (must be suffixed with a valid domain): A text input field containing 'dgs.ca.gov', highlighted with a green box.
- Password*: A text input field with masked characters.
- Verify Password*: A text input field.
- Title: A dropdown menu.
- First Name*: A text input field.
- Middle Name: A text input field.
- Preferred Name: A text input field.
- Last Name*: A text input field.
- Suffix: A dropdown menu.
- Account Activation Date: A date picker set to 10/30/2024.
- Account Termination Date: A date picker.
- Employee ID: A text input field.
- Email Address: A text input field.

HOW DOES A TRAVEL COORDINATOR ADD A USER TO CONCUR?

If the traveler is also an agency travel coordinator, click 'Travel Administrators.' This will give the user permissions to add/modify users, book for guests, and more. This is not to be checked for people who are Travel Assistants/Arrangers.

Do not click the other permissions/checkboxes, as they are not applicable to anyone outside of the Statewide Travel Program.

Travel Settings

User Group Membership (Group Id)

Authorized Support Contact (50156296)

STP Staff (328511199)

Travel Administrators (26650155)

Complete any other information known about the user, including position, manager, phone number, and address. The employee will also be able to complete this information once they have logged in.

Employee Position/Title Manager Name [Edit](#) [None](#)

Org. Unit/Division PAR/Level 2 STAR XML Profile Sync ID

Phone Number

Work Phone Work Extension Work Fax

2nd Work Phone/Remote Office

Home Address

Street

City State/Province/Region Postal Code

Country/Region

United States of America

Home Phone Email 2

Be sure to change any information needed in the default email so it is accurate. Click 'Save and Notify New User' to send the traveler an email with their log in information.

* Required Fields

[Save](#) [Save and Notify New User](#) [Save and New](#) [Cancel](#)

Email Parameters

If you click **Save and Notify New User**, the information below is what Concur will use in the email sent to the user. Change any of the default information as needed before you click **Save and Notify New User**.

From DoNotReply@concur.com Subject Concur Account Information

Message Text

Dear [FIRSTNAME] [LASTNAME],

Welcome to Concur! Your Login ID is [LOGIN]. You can access the site and change your password using the following link:

[LOGINURL]

After you change your password the link will immediately expire. (It will also expire after one week).

Login ID = [LOGIN]
First Name = [FIRSTNAME]
Last Name = [LASTNAME]
Login URL = [LOGINURL]

4. Additional Resources

[Travel Coordinator 101](#)

[Statewide Travel Program Training Resources Page](#)

[CI Azumano Webpage](#)

[Concur Login Page](#)