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How to Change a User's Name in Concur

Statewide Travel Program



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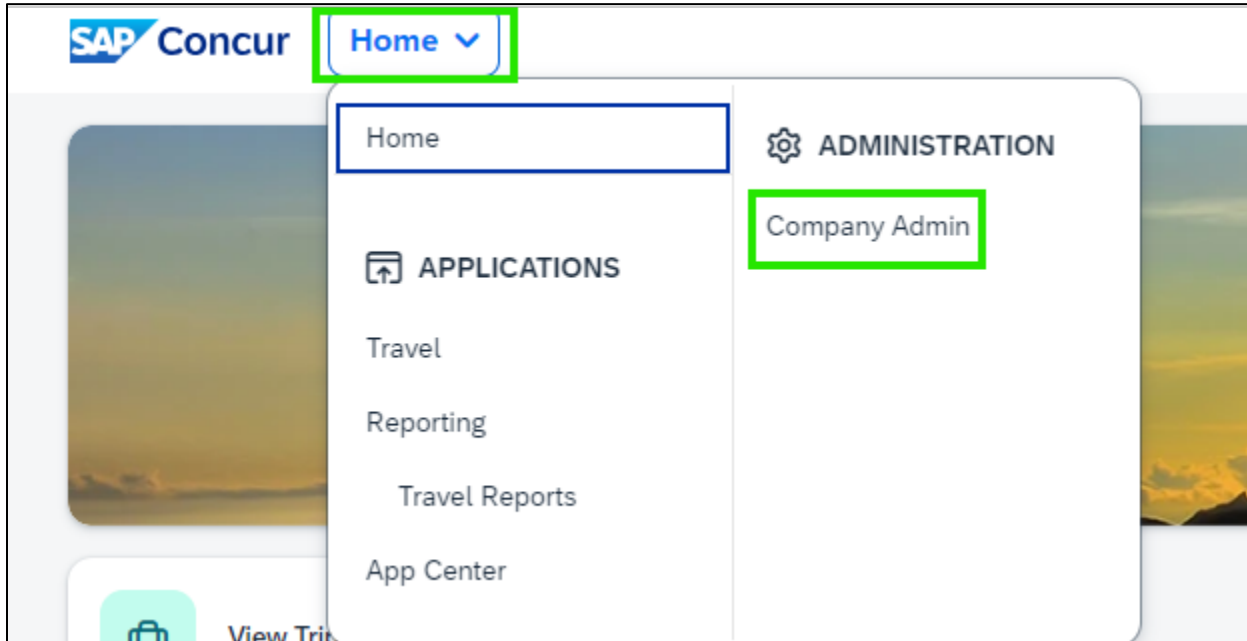
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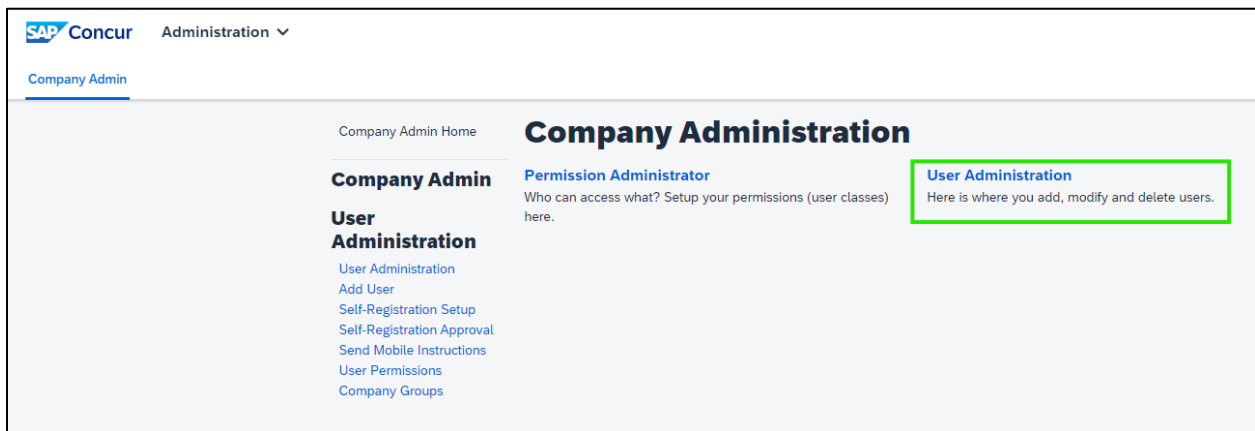
1. How to Change a User's Name in Concur

Only accounts that are part of the 'Travel Administrators' group in Concur can edit a user's name. Travel Coordinators should be listed as 'Travel Administrators' for their agency.

Log into your Concur account. Click 'Home.' Click 'Company Admin.'



Click 'User Administration.'



HOW TO CHANGE A USER'S NAME IN CONCUR

Type the user's name in the search bar. Click 'Search' to pull up all options in your agency.

The screenshot shows the 'User Administration' interface. At the top, there is a link to 'Add New User' and a checked 'Show Filters' option. Below this are filter sections for 'Manager' (set to 'All Managers'), 'Org. Unit' (set to 'All'), and 'Location' (set to 'All Locations'). There is also a section for 'User Status' (set to 'Active') and 'Max Results' (set to '25'). A search bar labeled 'Search Text' is highlighted with a green box, and a dropdown menu for 'Search What' is set to 'Name, Email, Log-in'. Below the search bar, there is a 'Columns To Display' section with checkboxes for 'Login ID', 'Manager', 'Org. Unit', and 'Job Title', all of which are checked. At the bottom right, there are 'Search' and 'Reset' buttons, with the 'Search' button highlighted by a green box.

Once you have found the correct user, click on their name. This will pull up their profile.

The screenshot shows the 'User Administration' interface after a search. The search bar now contains the text 'willie'. Below the search bar, there is a 'Users' section with a table of results. The table has columns for 'Last / First', 'Job Title', 'Org. Unit', 'Login ID', 'Manager', and 'PROFILE'. The first row shows a user with the last name 'willie', login ID 'williamvertest@dps.ca.gov', and manager 'None'. There are 3 records found. At the bottom right, there are 'Search' and 'Reset' buttons.

Last / First	Job Title	Org. Unit	Login ID	Manager	PROFILE
willie			williamvertest@dps.ca.gov	None	PROFILE

HOW TO CHANGE A USER'S NAME IN CONCUR

Now you can change the user's name. Be sure to spell it correctly. Travelers may be turned away at the gate if the name on their photo identification does not match their ticket.

- To change their first name, highlight the current name, delete it, and type the name into the box labeled First Name.
- To change or add their middle name, type the name into the box labeled Middle Name. If the user does not have a middle name, click the check box for no middle name.
- To change their last name, highlight the current name, delete it, and type the name into the box labeled Last Name.

The screenshot shows the 'User Details' form. At the top, there are three buttons: 'Save', 'Save and New', and 'Cancel'. Below this is the 'MFA Reset' section with a 'Reset' button and a note: 'This resets the user's MFA details, and they must now re-register their MFA methods upon their next sign-in.' The 'General Settings' section contains several fields: 'CTE Login Name*' (williamnevertest@dgs.ca.gov), 'Password*' (masked with asterisks), and 'Verify Password*'. The name fields are highlighted with a green border: 'Title' (dropdown menu), 'First Name*' (William), 'Middle Name', 'Preferred Name', 'Last Name*' (Nieber), and 'Suffix' (dropdown menu). Below the name fields are 'Account Activation Date' (10/08/2024), 'Employee ID', 'Account Termination Date', and 'Email Address'.

- Click 'Save.'

This screenshot is identical to the previous one, but the 'Save' button at the top of the form is highlighted with a green border.

2. Additional Resources

[How to Change a User's Name in Concur \(Video\)](#)

[Statewide Travel Program Training Resources Page](#)

[CI Azumano Webpage](#)

[Concur Login Page](#)