

Concur Travel QuickStart Guide



Concur Technologies

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4/23/2015	Updated UI Content	1.1	Concur
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- Travel & Expense
- Invoice
- Expense
- Travel
- Request
- Risk Messaging
- Concur for Mobile





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Updating Your Travel Profile

Before you use Concur's travel application for the first time, update your Travel profile. Even if you make no changes, you must **save** your profile before you can book a trip in Travel.

The screenshot displays the Concur application interface. The top navigation bar includes links for Requests, Travel, Expense, Invoice, Approvals, Reporting, and App Center. The user's name, John Smith, is shown in the top right corner. The main content area is titled 'Profile Options' and provides a comprehensive list of settings categories. A modal window is open on the right, allowing the user to administer for another user, with options for proxy or self-assigning travel arranger roles.

NOTES:

- Some companies have custom fields on this page. Check with your agency or Travel administrator if you need information on custom profile fields.
- Depending on your company's configuration, some of these options may not be available to you. Check with your Concur administrator.
- Depending on your company's configuration, this area in Profile may appear even if your company does not use Concur Travel.

Use the Travel profile options to set or change your personal Travel preferences and settings. They include:

- Assistant or travel arranger
- Credit card
- Email options
- E-Receipts
- Language
- Password
- Personal preferences (name, address, emergency contact, credit card)
- Regional preferences (number format, date format, language)
- Register for Concur for Mobile
- Travel preferences (air, hotel, car rental, rail preferences)

- Travel vacation reassignment and
- Other preferences and settings (default home page, calendar, emails, accessibility mode)

Travel Arranger

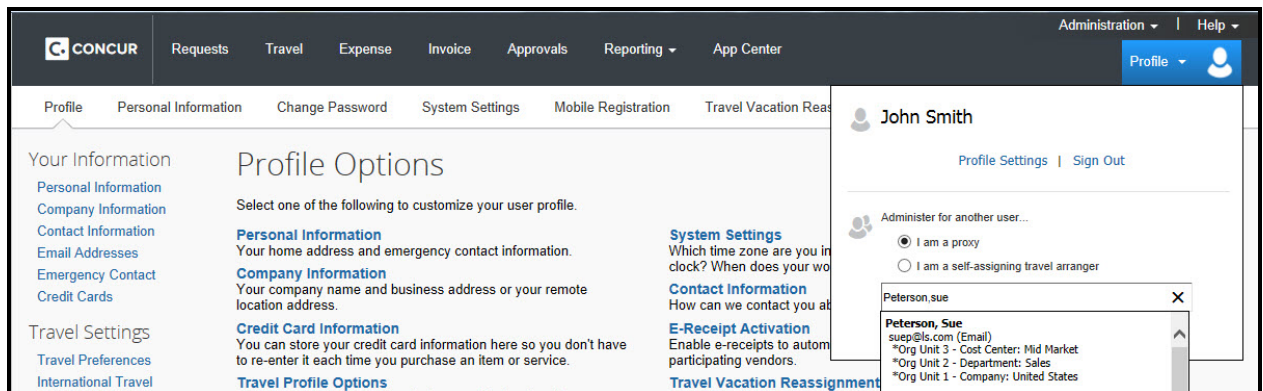
If you are a travel arranger and you want to change the profile of one of your users:

1. Click **Profile**.
2. In the **Administer for another user** field, type the first few letters of the user's name.
3. Select the desired user from the search results.
4. Click **Apply**.




Access



To access the profile information:

1. Click **Profile > Profile Settings**. The **Profile Options** page appears.
2. Select the desired option on the left side of the page.



Booking a Flight

Use the Flight  tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations **without** a flight, use the **Hotel**  and **Car**  **Search** tabs.

NOTE: If your company is configured to use rail, then the **Flight**  tab may show **Air / Rail** .

Access

You can access the Flight  (or Air / Rail ) tab in these ways:

- On the **Concur Home** page: On the menu, click **Travel**.
- On the **Concur Home** page: On the menu, click **Home** or the **Concur logo** (whichever applies).


The **Flight**  (or **Air/Rail** ) tab is on the left side of the page.

Step 1: Use the Flight (or Air / Rail) tab

To start the search:

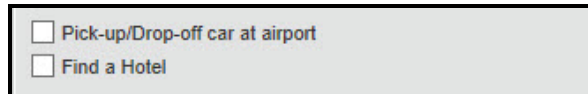
1. Depending on your company's configuration, you may be able to select a rule class. If so, select the appropriate rule class.
2. Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi-Segment (if available)
3. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. When you enter a city, airport name, or airport code, Concur will automatically search for a match.

NOTE: Use the **Find an airport** and **Select multiple airports** links as needed.

4. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the desired time range.
5. Click the  arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary, to see/reserve nonstop flights.

NOTES:

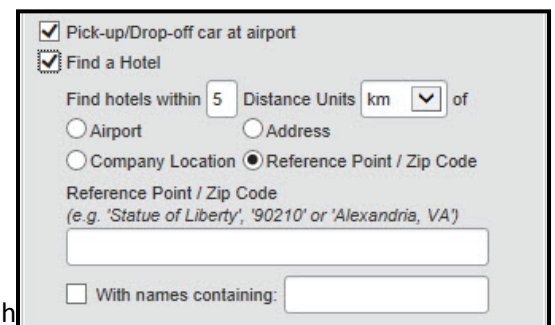
- The graphical display is based on flight schedule data. It will not show any rail options, nor can it take refundability or class of service preferences into account.
 - Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all of the flights available for that time slot.
 - If you change locations or dates, click **refresh graph** for more data.
6. If you need a car, click the **Pick-up / Drop-off car at airport** check box.



☐ Pick-up/Drop-off car at airport
☐ Find a Hotel

- Depending on your company's configuration, you might be able to automatically reserve a car, allowing you to bypass viewing the car search results. When you select this option, additional fields appear. Select a vendor and car type; the car is automatically added to your reservation.
 - If you need an off-airport car or have other special requests, you can skip this step and add a car later from your itinerary.
7. If you need a hotel, click the **Find a Hotel** check box. Additional fields appear.

- Choose to search near an airport, near an address, near a company location, or near a reference point / zip code (a city or neighborhood).
- If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add



☒ Pick-up/Drop-off car at airport
☒ Find a Hotel
Find hotels within Distance Units of
☐ Airport ☐ Address
☐ Company Location ☒ Reference Point / Zip Code
Reference Point / Zip Code
(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

☐ With names containing:

NOTE: Before booking, canceling, or changing your h
cancellation policy. Hotel cancellation policies have recently become much more strict.
Fees will likely apply.

8. Depending on your company's configuration, you might be able to specify an airline. If so, the **Specify airline** check box appears.

NOTE: You can only search one vendor at a time, and this will override the preferred airline searches normally done for all of the frequent flyer number carriers.

If you click the **Specify airline** check box, a list of carriers appears that are color coded:

- The first (yellow) will be their frequent flyer carriers.
 - The second (gray/khaki) are the most requested airlines.
 - The remaining airlines are in alphabetical order.
9. To search only for refundable flights, click the **Refundable only air fares** check box.
10. Depending on your company's configuration, you might be able to book for a companion. If so, select from the **Number of adults** list.

NOTE: If a companion is selected, the payment screen provides the option to use the credit card from the companion's profile.

11. Depending on your company's configuration, you might be able to select the desired class of service.
12. For **Search flights by**, select either **Price** or **Schedule**. (Depending on your company's configuration, you may not have these options or you may have an additional option: **Multi-Fare**.)
13. If necessary, uncheck the **Flight w/ no double connections** check box.
14. Click **Search**. The flight search results appear.

The screenshot shows a 'Flight Search' form with the following elements:

- Icons:** Four icons at the top: an airplane, a car, a bed, and a clock.
- Flight Search Header:** The title 'Flight Search' is followed by three radio buttons: 'Round Trip' (selected), 'One Way', and 'Multi-Segment'.
- Departure City:** A text box containing 'Seattle, WA - Seattle Tacoma Intl Arpt'. Below it are links for 'Find an airport' and 'Select multiple airports'.
- Arrival City:** A text box containing 'Atlanta, GA - Hartsfield Intl Arpt'. Below it are links for 'Find an airport' and 'Select multiple airports'.
- Departure:** A date field with '2015-10-26', a 'depart' dropdown, a time dropdown with 'Morning', and a time zone dropdown with '± 3'. A blue chevron icon is to the right.
- Return:** A date field with '2015-10-30', a 'depart' dropdown, a time dropdown with 'Afternoon', and a time zone dropdown with '± 3'. A blue chevron icon is to the right.
- Checkboxes:** Two checked checkboxes: 'Pick-up/Drop-off car at airport' and 'Find a Hotel'.
- Hotel Search:** A section for finding hotels within 5 distance units (km) of a location. It includes radio buttons for 'Airport', 'Address', 'Company Location', and 'Reference Point / Zip Code' (selected). Below is a text box for the reference point containing 'Atlanta, GA'.
- Other Options:** A checkbox for 'With names containing:' followed by an empty text box. A checkbox for 'Refundable only air fares' is unchecked.
- Class of Service:** A dropdown menu set to 'Highest allowed' with a help icon.
- Search flights by:** Two radio buttons: 'Price' and 'Schedule' (selected).
- Flights w/ no double connections:** A checked checkbox.
- Search Button:** A large orange button labeled 'Search' at the bottom.

Step 2: Select a flight

On the Flight Search results page:

- If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
- If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active.

(Click either Shop by Fares or Shop by Schedule - whichever applies - for the appropriate help information).

Trip Summary

Select Flights
Round Trip
SEA - ATL
Outbound: Mon, 2015-10-26
Return: Fri, 2015-10-30

Select a Car Remove
Days: 4
ATL - Terminal
Pick-up: Mon, 2015-10-26
Drop-off: Fri, 2015-10-30

Select a Hotel Remove
Nights: 4
Atlanta, GA
Check-in: Mon, 2015-10-26
Check-out: Fri, 2015-10-30

Finalize Trip

Change Flight Search

Outbound - Mon, Oct 26

Depart: 6:00 - 12:00
Arrive: 13:46 - 23:19

Display Settings

SEATTLE, WA TO ATLANTA, GA
MON, OCT 26 - FRI, OCT 30

Print / Email
Hide matrix

All 48 results	Delta	United	American Airlines	Multiple Carriers	Alaska Airlines
Nonstop 6 results	5 results	--	--	--	1 results
1 stop 41 results	12 results	8 results	14 results	6 results	1 results
2 stops 1 results	--	--	1 results	--	--

Baggage Fee Policies Show fare display legend

NOTE: Please use schedule page to select your flights.

Outbound Return Sorted By: Depart - Earliest

Seattle, WA - Mon, Oct 26
Displaying: 48 out of 48 results.

	Carrier	Depart	Arrive	Stops	Class	Seat Map
Quote for Price	Delta #1694	SEA 6:00	ATL 13:46	0	Economy	
4h 46m; Boeing 737-900; (Worldspan)						
Quote for Price	United #1929	SEA 6:16	EWR 14:34	0	Business	
Quote for Price	United #0568	EWR 15:29	ATL 18:06	0	Business	
8h 50m; Boeing 737-800, Airbus Industrie A320-100/200; (Worldspan)						
Quote for Price	United #1929	SEA 6:16	EWR 14:34	0	Business	
Quote for Price	United #0607	EWR 17:27	ATL 20:07	0	Business	
10h 51m; Boeing 737-800, Airbus Industrie A319; (Worldspan)						

Step 3: Select a rental car

If you requested a car on the **Flight** (or **Air/Rail**) **Search** tab, the rental car search results appear. For information about booking a rental car, see **Booking a Car** in this document.

Step 4: Select a hotel

If you requested a hotel on the **Flight** (or **air/Rail**) **Search** tab, the hotel search results appear. For information about booking a hotel, see **Booking a Hotel** in this document.

Step 5: Review the Travel Details page (itinerary)

Review and change your itinerary, if necessary.

1. In the **Trip Overview** section:
 - a. Review the information for accuracy.
 - b. In the **I want to** section, print or email as appropriate.

- c. In the **Add to your Itinerary** section, add a car, hotel, etc., as necessary.
2. In the **Flight** section:
 - a. Verify the information for accuracy.
 - b. Click **Change Seat** to select a different seat (depending on the airline).
 - c. Your company might allow you to change your flight from the itinerary page. If so, click **Change**, and then follow the prompts to change your outbound or return flight

Travelers given the option to change a flight will be able to select a different date or time for the trip, but must stay on the same airline.

Note: Changing a flight can result in fare changes. If this option is available to you, please make sure to check with your travel agency on fare differences.
 - d. Click **Cancel all Air**, if necessary.
3. Review the remaining sections as necessary, and make the appropriate changes.
4. Review the **Total Estimated Cost** section.
5. Click **Next**.

The **Trip Booking Information** page appears.

The screenshot displays the 'Trip Booking Information' page. On the left is a 'Trip Summary' sidebar with a progress indicator showing 'Car Reserved' and 'Finalize Trip'. The main area is titled 'Travel Details' and contains a 'TRIP OVERVIEW' section with trip metadata and an 'Add to your Itinerary' button. Below this is a 'RESERVATIONS' section for a flight from Seattle to Atlanta on October 26, 2015, with details on departure, seat, and confirmation status.

Trip Summary	
	Car Reserved Days: 4 ATL - Terminal Pick-up: Mon, 2015-10-26 Drop-off: Fri, 2015-10-30
	Finalize Trip Review Travel Details Enter Trip Information Submit Trip Confirmation

Travel Details	
TRIP OVERVIEW	
I want to... Print Itinerary E-mail Itinerary	Trip Name: Trip from Seattle to Atlanta Edit Start Date: 2015, October 26 End Date: 2015, October 30 Created: 2015, October 02, William Never (Modified: 2015, October 02) Description: (No Description Available) Edit Agency Record Locator: 3JDSC5 Passengers: William.N Never Total Estimated Cost: \$547.13 USD Details
<div> Airfare must be ticketed by an agent by: 2015-10-04 2:00 Eastern </div>	
RESERVATIONS	
2015, October 26, Monday	
Flight Delta 1694 Departure: 6:00 Seat: 35C Change Seat Seattle Tacoma Intl Apt (SEA) Duration: 4 hours, 46 minutes Nonstop	Seattle, WA (SEA) to Atlanta, GA (ATL) Cancel all Air Confirmation: GNC79D Status: Confirmed

Step 6: Review the booking information

Use the **Trip Booking Information** page to enter additional information about your trip. Then:

1. Enter or modify your trip name. This is how the trip will appear on your itinerary and in the automated email from Concur.
2. Enter a trip description.
3. Enter any comments for the travel agent. Refer to your company policy for information regarding the use of the agent's comment field.

NOTE: Be aware that making an entry in this field will likely generate an agency fee.

4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed. Separated by commas.
 - If you book the trip, you will automatically receive the email.
 - If you book as an arranger, you will also receive the email.
5. Choose your preferred email format, either plain text or HTML. Some companies do not offer travelers this option and always send plain-text email.
6. Depending on your company's configuration, you might be able to choose whether you would like to receive directions or maps to the hotel. This information will be part of the initial email from Concur.
7. Depending on your company's configuration, your company may require billing information. If so, make sure to complete this information if requested.

NOTE: Your company might offer its travelers the option to Hold a trip. Travel will always display the length of time this trip can be held on this page. **Pay close attention to the date and time displayed; if the trip is not submitted, approved, and ticketed by the date and time displayed, in most cases it will be automatically cancelled.**

8. Click **Next**. Concur displays your itinerary on the **Trip Confirmation** page. This itinerary will include any messages about ticketing policies.

Trip Summary

Car Reserved

Days: 4
ATL - Terminal

Pick-up: Mon, 2015-10-26
Drop-off: Fri, 2015-10-30

Finalize Trip

✓ Review Travel Details
Enter Trip Information
Submit Trip Confirmation

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name
This will appear in your upcoming trip list.

Trip from Seattle to Atlanta

Trip Description (optional)
Used to identify the trip purpose

Send a copy of the confirmation to: []

Send my email confirmation as
☒ HTML ☐ Plain-text

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled.
Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip << Previous Next >> Cancel

Step 7: Purchase the ticket

1. Click **Confirm Booking** to send your request to the travel agents. The **Finished!** screen shows your confirmation number and information to contact the travel agent.
2. Click **Return to Travel Center**.

Booking a Car

Step 1: Use the Car 🚗 tab

If you require a car **but not airfare**, request the car using the Car 🚗 tab instead of the Flight ✈️ (or Air/Rail 🚂) tab. To do so:

1. Enter your pick-up and drop-off dates and times.
 - In the **Pick-up car at** section, select either:
 - **Airport Terminal** and then type the city or the Airport code
 - **Off-Airport** and then enter (or search for) the location (depending on configuration, you may be able to have a car delivered to or from company location)
2. Select **Return car to another location**, if desired. Additional fields appear. Choose the desired location.
3. To see additional search preferences, click **More Search Options**.
 - Select the **Car Type**.
NOTE: Hold the Ctrl key to select more than one type.
 - Select smoking or non-smoking.
 - Select the preferred vendors.
4. Click **Search**. The rental car search results appear.

The screenshot shows a 'Car Search' form with the following sections:

- Navigation:** Icons for Flight, Car, Hotel, and Clock.
- Car Search:**
 - Pick-up date:** A date field and a time dropdown set to 12:00.
 - Drop-off date:** A date field and a time dropdown set to 12:00.
 - Pick-up car at:** Radio buttons for 'Airport Terminal' (selected) and 'Off-Airport'. Below is a text field 'Please enter an airport.'
 - Return car to another location:** An unchecked checkbox.
 - More Search Options:** A link to expand search preferences.
 - Car Type (Select up to 3):** A list with checkboxes for Economy Car, Compact Car, Intermediate Car, Standard Car, and Full-size Car.
 - Smoking:** A dropdown menu currently set to 'Don't care'.
 - Preferred:** A section titled 'No vendors in profile.'
 - Car Vendors:** A list with checkboxes for 'Any Vendor' (checked), 'Avis*', 'Dollar*', and 'Enterprise*'. The 'Any Vendor' option is highlighted in yellow.
- Footer:** A note stating 'Your company preferred vendors will be included in the search with your preferences.' and a small text '*Indicates major vendor.'
- Search Button:** A red button labeled 'Search'.

Step 2: Filter the results (if desired)

There are two sets of filters: one at the top of the page and one at the left side of the page.

Left side of the page: Use the show ▼ and hide ▲ arrows as needed.

- In the **Car booking options** area, select other desired options.
 - Car program information:
 - Select a different program, if available.
 - To add a program, click the **Add car Mileage Program** link.
- If you set up a credit card as the default in your profile, the card appears. Change if desired.
- In the **Change Car Search** area:
 - Change your pick-up and drop-off dates and times; change your pick-up location; change your drop-off location.
 - Expand **More Search Options** to select car type, vendors, etc.
 - Click **Search**. Travel displays the new results.
- In the **Car Display Filters** area, select the desired options.

Matrix - Top right side of the page: Use the grid to filter the results.

- Your company may display only its preferred vendors in the left column.
- The shaded column, if any, displays the type of car defined in your company's travel

policy.

- To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
- To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
- To see cars of a particular size *and* a particular vendor, click the appropriate cell. The search results below will reflect that choice.

Step 3: Sort the results (if desired)

Below the matrix is the **Sorted By** list. Select the desired sort option.

Step 4: Review the results

Note that the color of the **Select** button reflects policy compliance.

Trip Summary

Select a Car

Days: 4
ATL - Terminal
Pick-up: Mon, 2015-10-26
Drop-off: Fri, 2015-10-30

Finalize Trip

Change Car Search

Car Display Filters

- ☐ Unlimited miles
- ☐ Air conditioning
- ☐ Hybrid
- Car Transmission**
 - ☐ Automatic
 - ☐ Manual

PICK UP: (ATL) ON MON, OCT 26 12:00
RETURN: FRI, OCT 30 12:00

Print / Email
Hide matrix

All 10 results	Economy Car	Intermediate Car
	45.00	49.00
	46.00	63.00
	46.00	64.00
	46.74	50.96
	46.74	64.00

Sorted By: Policy - Most Compliant

Displaying: 10 out of 10 results.

Economy Car (Worldspan) [more info](#)

\$45.00 per day **Select**

Unlimited miles
Pick-up: Terminal: ATL
Automatic transmission
Total cost **\$249.59**

Economy Car (Worldspan) [more info](#)

\$46.00 per day **Select**

Unlimited miles
Pick-up: Terminal: ATL
Automatic transmission
Total cost **\$255.90**



Intermediate Car (Worldspan) [more info](#)

Also:

- Review the price and options.
- Click the picture of the car (if available) to see a larger picture as well as passenger and luggage capacity.
- Click **more info** for more information about the available options.

Step 5: Select the rental car

1. Click **Select**. (The color of the **Select** button reflects policy compliance. A green button indicates the car is within company policy. A red button indicates the car is not within company policy.)
2. The **Review and Reserve Car** page appears:
 - Review the details for accuracy.
 - Select a program if desired.
 - Select a method of payment, if necessary.

3. Click **Reserve Car and Continue**.
4. Then:
 - If you requested the car using the Flight  (or Air/Rail ) tab and you elected to reserve a hotel room, Travel now displays those search result pages.
 - If not, your **Travel Details** page (itinerary) appears and you can complete the booking.



Booking a Hotel

Step 1: Use the Hotel tab

If you require a hotel **but not airfare**, use the Hotel  tab. To do so:

1. Enter the check-in and check-out dates (or click each field and use the calendar).
2. Enter the search radius and choose either miles or kilometers. Concur will always show *company preferred hotels* within a larger radius, usually 30 miles or kilometers.
3. Choose to search near an airport, near an address, near a company location, or near a reference point / zip code (a city or neighborhood).
4. If you will be using more than one hotel on your trip, select the **Add Another Hotel** check box. Additional fields appear. The **Check-in Date** field for the second hotel is automatically populated with the check-out date of the first hotel. Change as necessary.
5. Click **Search**. The hotel search results appear.

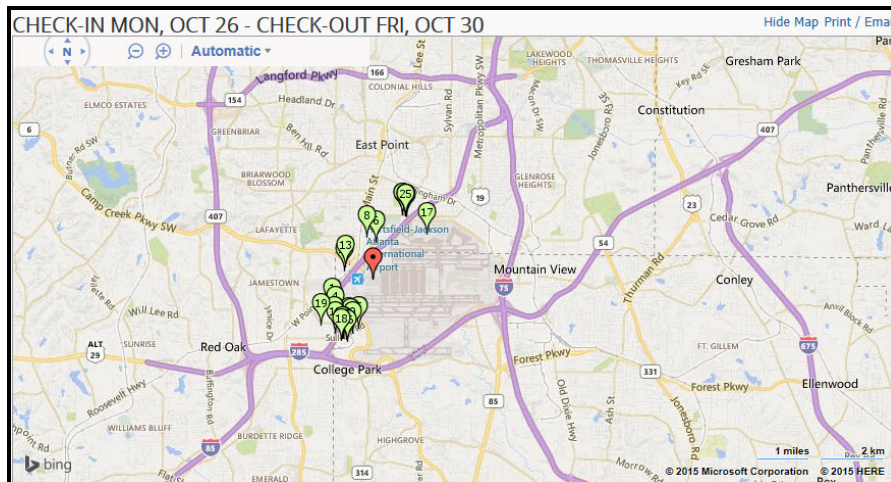
Step 2: Change and filter your search (if desired)

There is a filter set on the left side of the page. Use show  and hide  as needed.

- In the **Change search** area:
 - Change your check-in and check-out dates; change your hotel location.
 - Click **Search**. Travel displays the new results.
- Use the slider in the **Price** area to narrow your search.
- In the **Hotel chain** area, select the desired hotels.
- In the **Hotel Amenities** area, select the desired options.

Step 3: Review the hotel map (if desired)

Review the hotel map. Click any green "balloon" to see specific hotel information. Click, zoom, and move the map as desired.



Step 4: Sort the search results (if desired)

Below the map, select from the **Sorted By** list to sort the results. Enter hotel names, if desired.

Step 5: Review the results

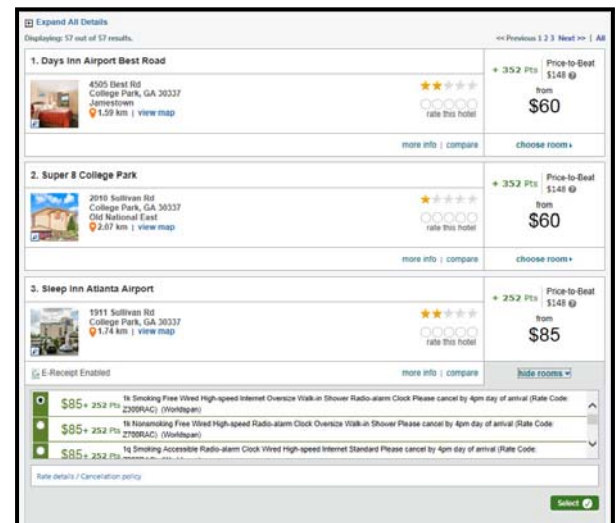
A picture as well as the name, address, rating stars, and price range appears.

Click the picture to see more images.

Click **more info** to see contact information, street address, cancellation policy, and information about the facility.

Click **choose room** to see:

- The available rates
- Other amenities per room/rate
- Rate details and cancellation policy



Step 6: Compare the results

To compare hotels, click **compare** for the desired hotels. The selected hotels "float" to the top of the list for easy comparison.

Click **remove** to move a hotel out of the comparison list.

Step 7: Select the hotel room

1. Click **Select**. (Note that the color of the **Select** button reflects policy compliance.)
2. The **Review and Reserve Hotel** page appears. Navigate through the page and:
 - Review or modify the room preferences.

- Verify or modify the guest and program information.
 - Review the price information.
 - Select a form of payment, if available, as defined by your company's configuration.
 - Review the rate and cancellation information.
3. Select the **I agree to the hotel's rate rules, restrictions, and cancellation policy** check box.
 4. Click **Reserve Hotel and Continue**. Your **Travel Details** page (itinerary) displays.

Creating an Expense Report Based on a Completed Trip

If you use Concur Expense, from the Upcoming Trips tab, you can create an expense report based on a trip.

To create an expense report based on a completed trip:

1. On the **Concur Home** page, on the Quick Task Bar, click the **New** task, and then click **Start a Report**.
OR
On the menu, click **Expense > Manage Expenses** (on the sub-menu). Under Active Reports, click the **Create New Report** tile.
2. Complete all required fields (indicated with a red bar) and the optional field as directed by your company. (The fields that appear on this page are defined by your company). Some products might go directly to the expense reporting page.
3. Click **Next**.
The expense report page appears. At this point you can add your out-of-pocket expenses and your company card transactions.

Note the following - The **Expense** link appears when the actual expense is incurred:

- For hotel and car segments, the expense is actually incurred at check-out or when the car is returned, so the **Expense** link will not appear until the trip is completed (the last date of the trip).
- For an air expense, when the **Expense** link appears depends on the company's configuration.
 - If the Expense configuration allows air to be expensed when it is paid for (generally well in advance of the actual trip), then the link appears once the air has been ticketed.
 - If the Expense configuration does not allow for pre-trip air reimbursement, then the link appears after the trip is completed (the last date of the trip).

Company Notes	Upcoming Trips	Trips Awaiting Approval	Remove Trips		
Trip Name/Description		Status	Start Date	End Date	Action
Trip from Seattle to Memphis (2XZSBA) (33AK)		Needs Expense Report Withdrawn	2015-04-09	2015-04-13	Expense
Car Reservation at MEMPHIS (MYD8LF)		Needs Expense Report Withdrawn	2015-04-09	2015-04-12	Expense
Hotel Reservation at MEMPHIS, TN, USA (2YHASK)		Needs Expense Report Withdrawn	2015-04-09	2015-04-11	Expense
Car Reservation at SEATTLE (NNQFSF)		Needs Expense Report Withdrawn	2015-05-25	2015-05-29	Expense
Car Reservation at SEATTLE (OBNGX9)		Needs Expense Report Withdrawn	2015-05-25	2015-05-29	Expense