Concur Travel QuickStart Guide

Concur Technologies

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Document Revision History

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08/22/2014	Concur Travel QuickStart Guide	1.0	Concur
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10/2/2015	Added UI Images	1.2	Concur

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- Expense
- Travel
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- Risk Messaging
- Concur for Mobile

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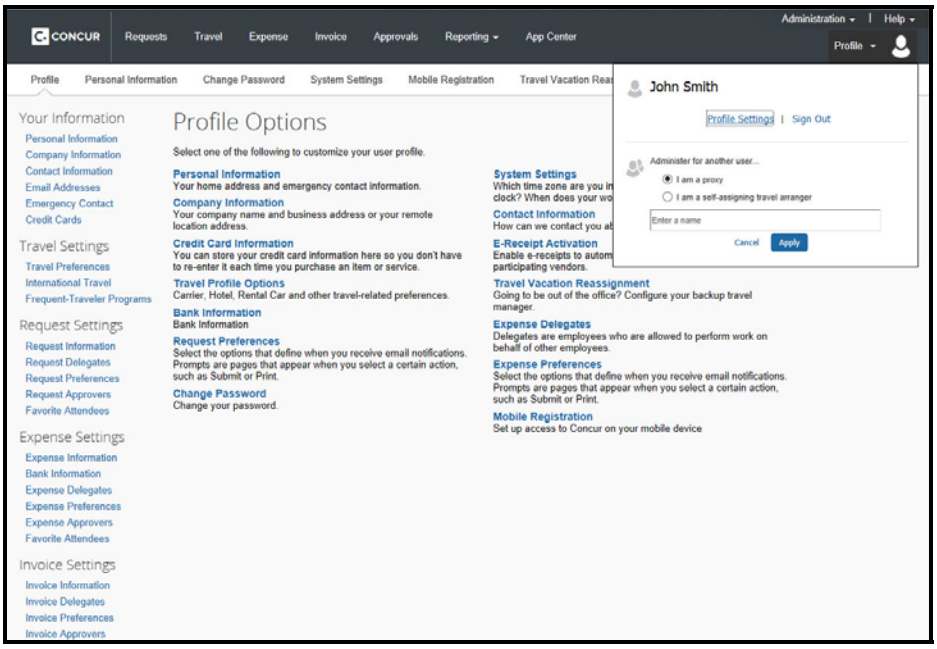
Updating Your Travel Profile

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.



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)

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

Travel Arranger

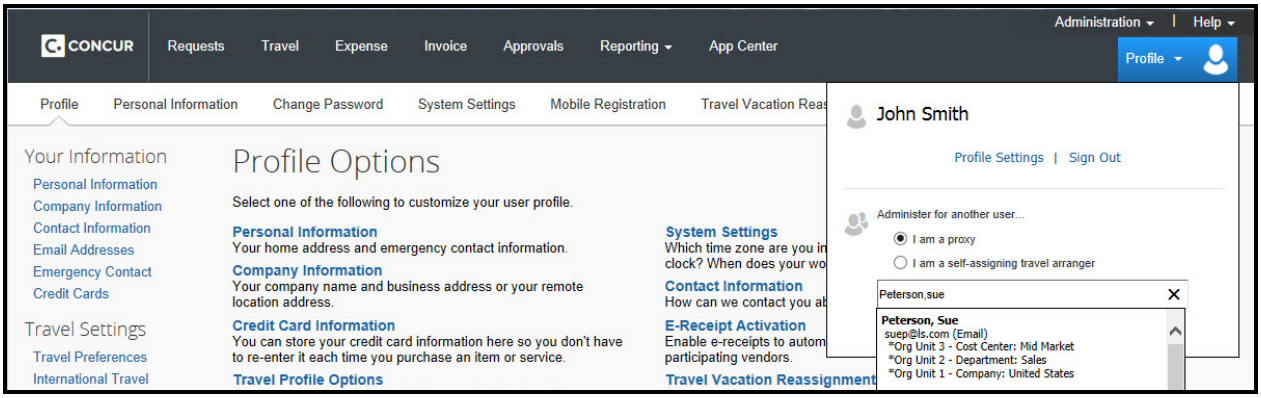
If you are a travel arranger and you want to change the profile of one of your users:

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.



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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**.

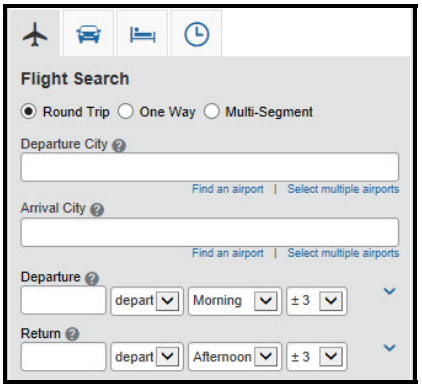
Access

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.

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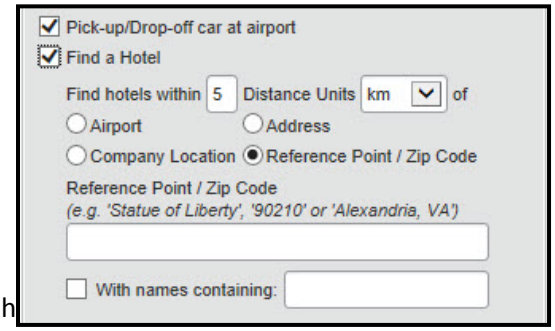
NOTES:

- 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.

- 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

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.

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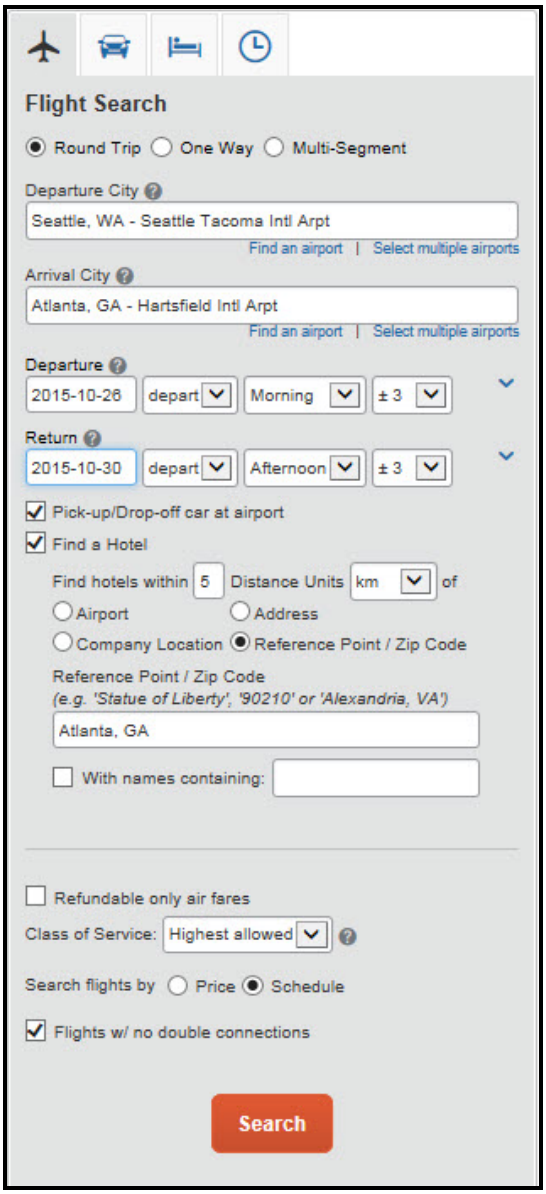
NOTE: If a companion is selected, the payment screen provides the option to use the credit card from the companion's profile.

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.



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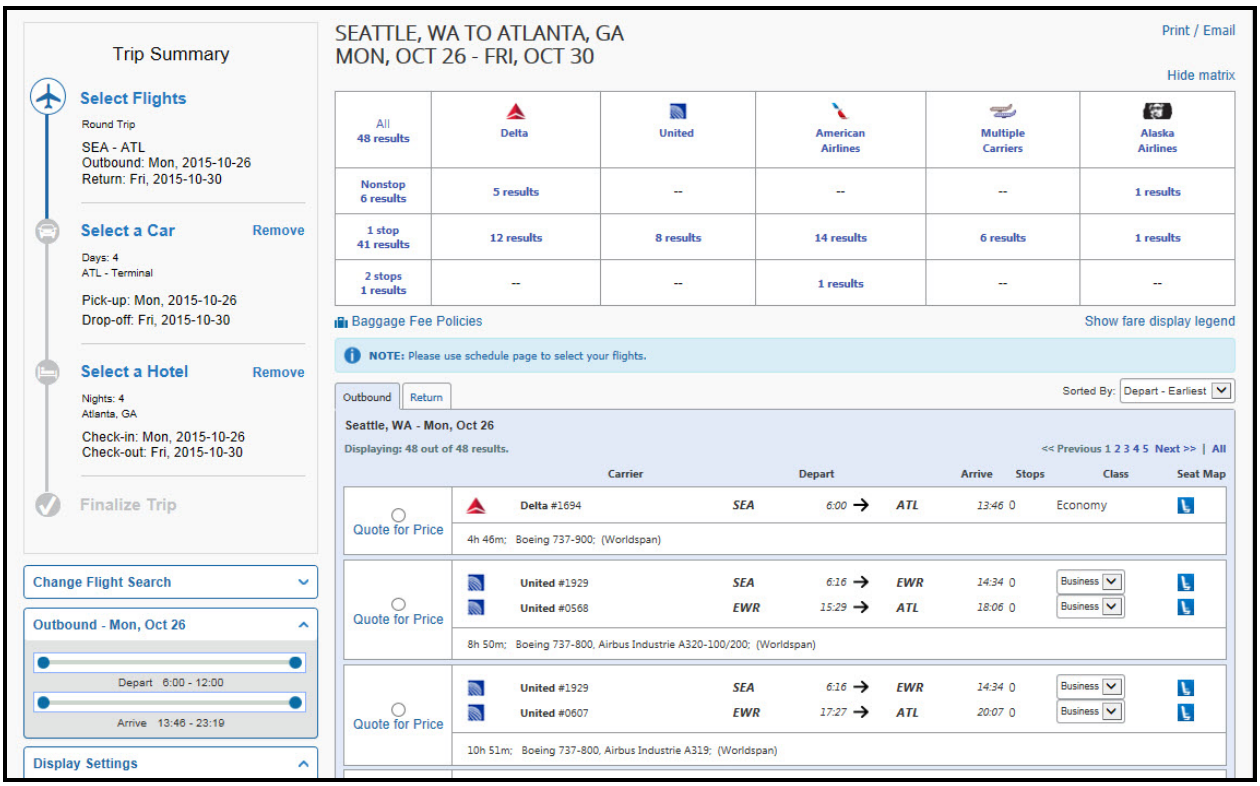
Step 2: Select a flight

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).



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.

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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 difference 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.

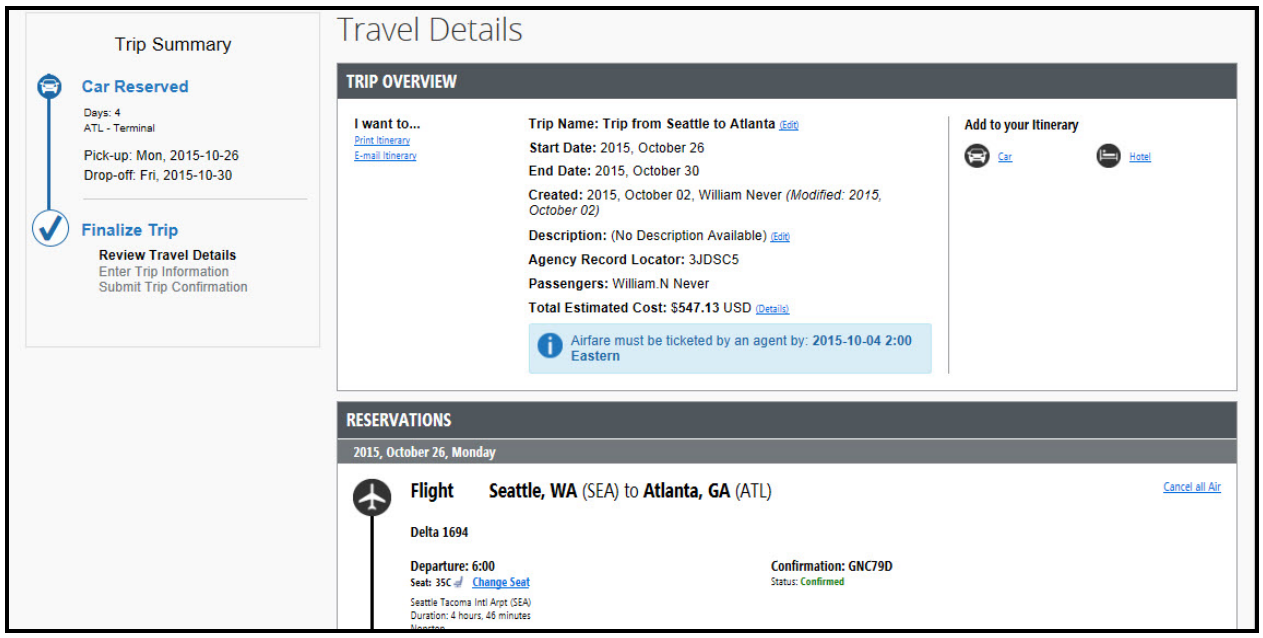
   d. Click **Cancel all Air**, if necessary.

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.



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.

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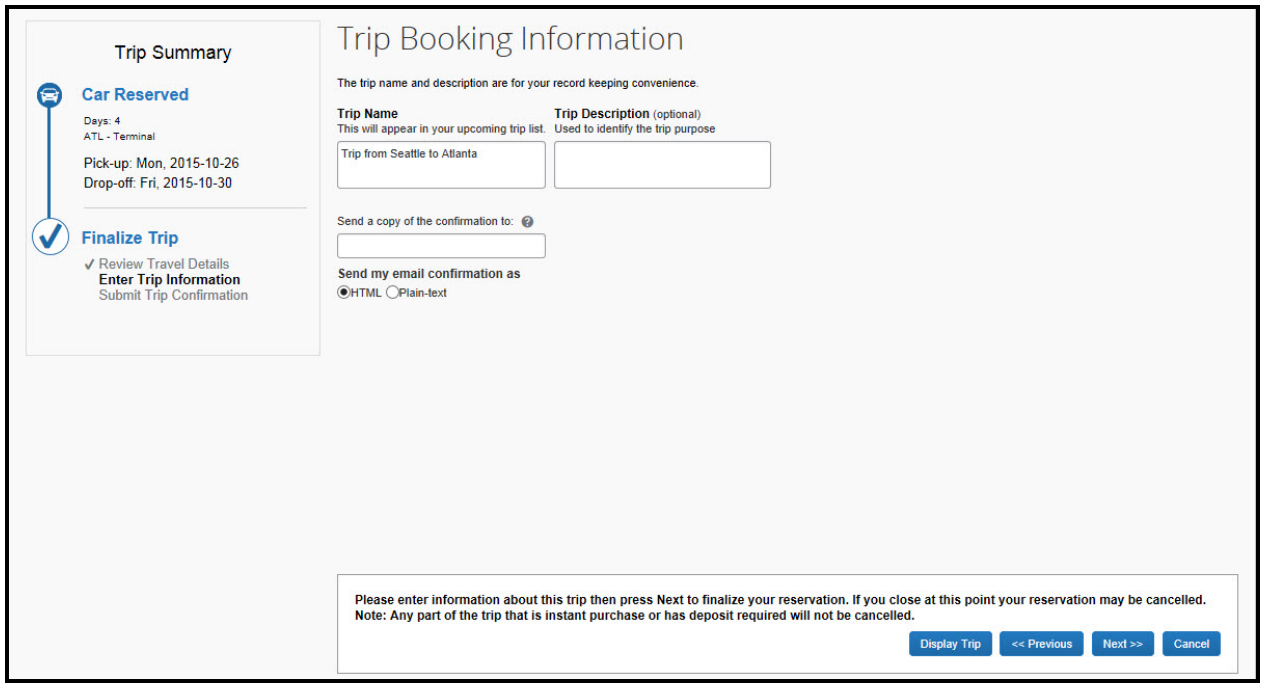
4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed. Separated by commas.
   - If you book the trip, you will automatically receive the email.
   - If you book as an arranger, you will also receive the email.
5. Choose your preferred 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.



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**.

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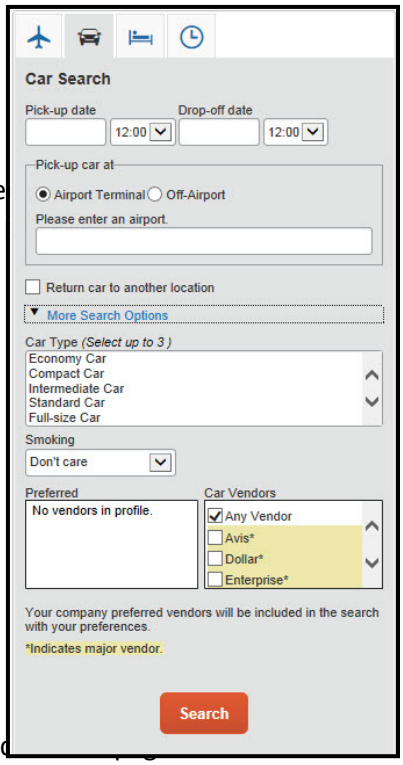
Booking a Car

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 (depe configuration, you may be able to have a car delivered to or 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 **Cr 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.

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 si

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

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policy.

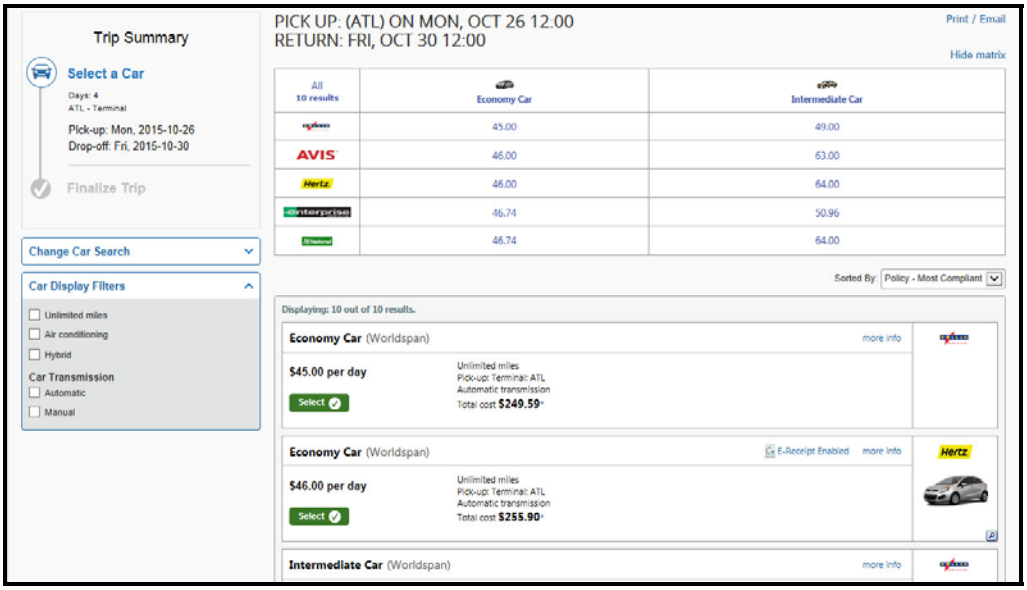
- To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
- To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
- To see cars of a particular size *and* a particular vendor,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



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.

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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.

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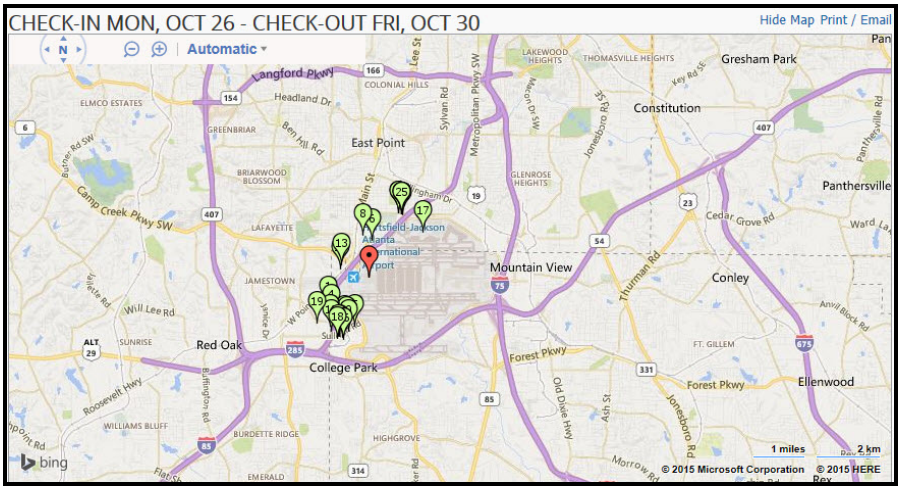
Step 3: Review the hotel map (if desired)

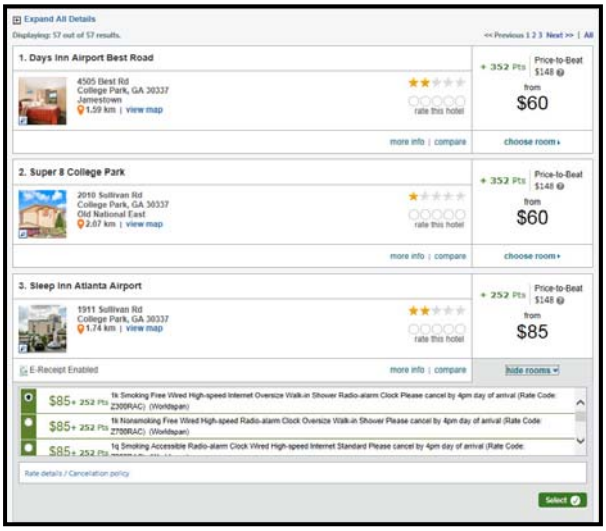
Review the hotel map. Click any green "balloon" to see specific hotel information. Click, zoom, and move the map as desired.



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.

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- 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).

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