QuickStart Guide Concur® Travel	
	C-ncur*

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Welcome to Concur Travel

Welcome to Travel, Concur's powerful employee travel management solution that enables you to create travel bookings online.

Concur's Travel feature enables you to:

- Search the same vendor inventory that your travel agency uses.
- Find, coordinate, and reserve your airline, rental car, hotel, rail, limo, or dining reservations for your business travel.
- Comply with your company's travel policy when booking your travel.

Section 1: Log on to Concur

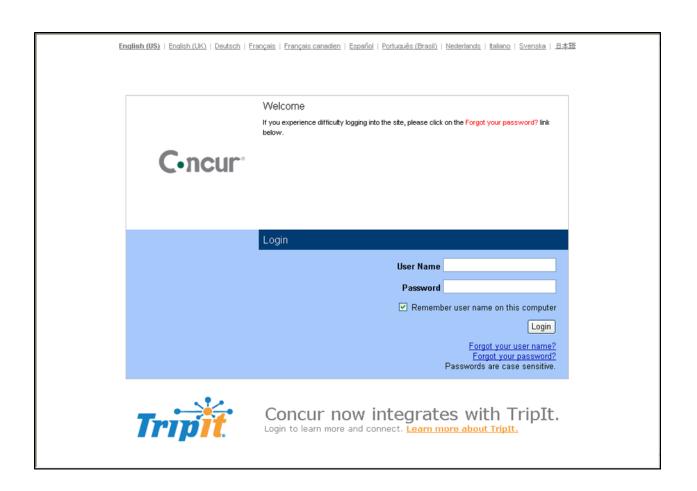
How to...

1. Log on to Concur following your company's logon instructions.

Additional Information

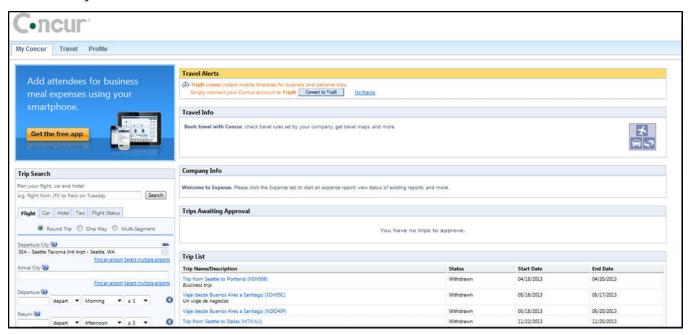
Your password is case sensitive.

If you are not sure how to log on, check with your company's administrator.



Section 2: Explore the My Concur Page

The **My Concur** page includes several sections that make it easy for you to navigate and find the information you need.



How to...

Use the Trip Search section.

Explore the **Trip List** section.

Explore the Trips Awaiting Approval section.

Explore the **Travel Info** section.

Additional Information

This section provides the tools you need to book a trip with any or all of these: flight, car, hotel, limo, and dining.

This section appears on My Concur only if your company uses Travel.

This section lists your outstanding trips.

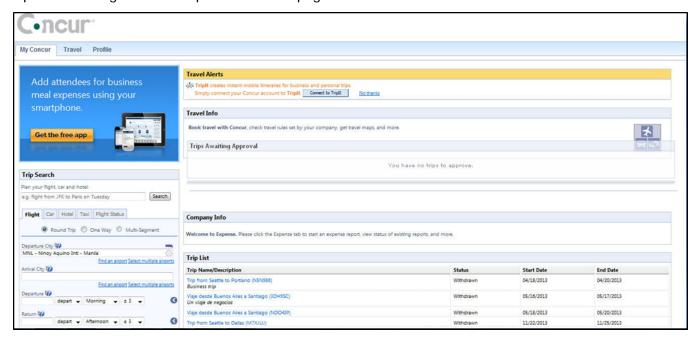
This section lists the trips awaiting your approval.

This section appears on My Concur only if you are a travel approver.

This section provides contact information for help with booking travel and general travel information.

Customize My Concur

You can move the panes around the **My Concur** page to better meet your needs. Click the top bar of a pane and drag it to a new position on the page.



Section 3: Update Your Travel Profile

Before you use Travel for the first time, update your profile. You must save your profile before you first attempt to book a trip in Travel.

If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the Profile page).

Step 1: Change Your Password

Your company decides if you can change your password. If allowed, you will change your password on the Profile tab.

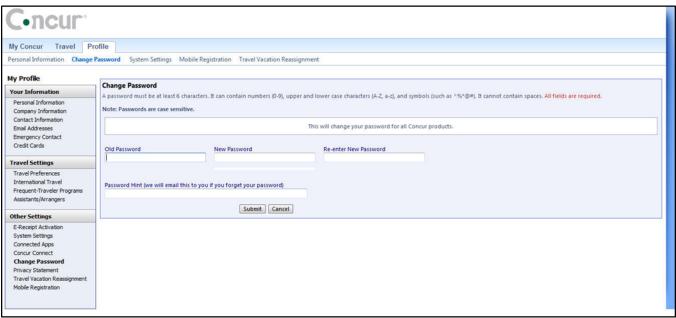
How to...

- 1. On the **My Concur** page, select **Profile** from the menu at the top of the page.
- On the Profile submenu, click Change Password.
- 3. In the **Old Password** field, enter your current (temporary) password.
- In the **New Password** field, enter your new password.
- 5. Verify your new password by re-entering it in the **Re-enter Password** field.
- 6. Enter a word or phrase in the **Password Hint** field to act as a reminder if you forget your password, and then click **Save**.

Additional Information

If your company uses Single Sign On, you access Travel via your company's intranet. If that is the case, you will not see this option on the Profile menu nor will you be able to change your password.

To change your password, you need to know your old or temporary password.



Section 3: Update Your Travel Profile (Continued)

Step 2: Change your Time Zone, Date Format, or Language

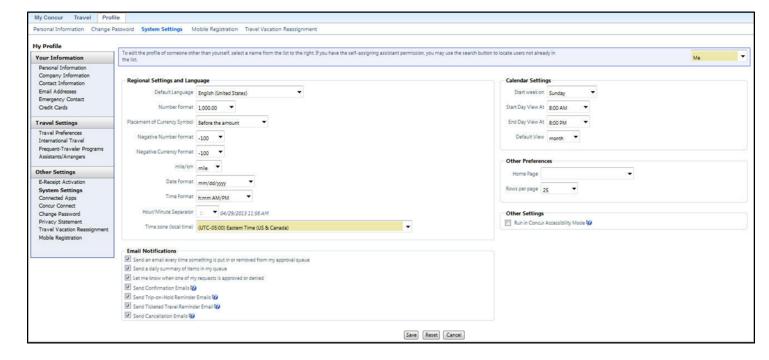
How to...

- 1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
- 2. On the **Profile** submenu, click **System Settings**.
- On the System Settings page, update the appropriate information, and then click Save.

Additional Information

You can change the system and regional settings (number, currently, date, and time format).

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.



Section 3: Update Your Travel Profile (Continued)

Step 3: Update Your Personal Information

How to...

- On the My Concur page, click Profile on the menu at the top of the page.
- 2. On the **Profile** submenu, click **Personal Information**.
- 3. On the **My Profile** page, update the appropriate information, and then click **Save**.

Additional Information

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

Complete these sections of your travel profile:

- Name & Airport Security
- Home Address
- Work Address
- Contact Information
- Emergency contact
- Travel Preferences
- Credit Cards

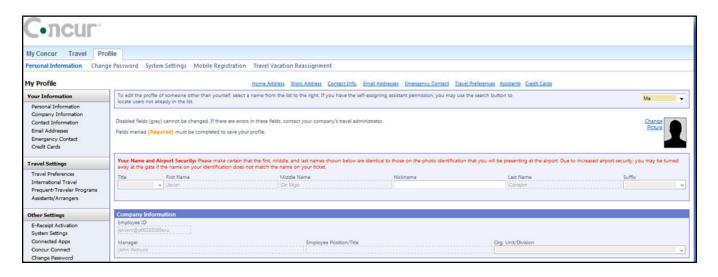
You must complete all fields marked **Required** (in orange) to save your profile.

Verify that the first and last name fields match the ID used at the airport.

If you cannot edit these fields, contact your travel agency or travel manager to make changes.

The country you select in the work address fields will determine the default map that appears on the **Concur Travel Map** tab.

There are several **Save** buttons on the profile page. You only need to save once as every **Save** button saves the entire profile.



Section 3: Update Your Travel Profile (Continued)

Step 4: Set Up a Travel Arranger or Assistant

How to...

- 1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
- On the Profile dropdown menu, select Personal Information.
- 3. Click **Assistants** at the top of the page.
- Click Add an Assistant to search for your assistant's last name.
- 5. In the **Search Criteria** field, enter the assistant's name.
- 6. Click Search.
- 7. Click the **Assistant** dropdown arrow.
- 8. Select the appropriate name from the dropdown list
- 9. Select Can book travel for me.
- 10. Select Is my primary assistant for travel.
- 11. Click Save.

Additional Information

Use **Assistants & Travel Arrangers** to give other Travel users the ability to view and modify your profile or book travel and trips for you.

The primary assistant's name and work phone number become part of the traveler's GDS profile, if configured.

Important: Your assistant must have an existing Travel account before you can add him or her to your profile.

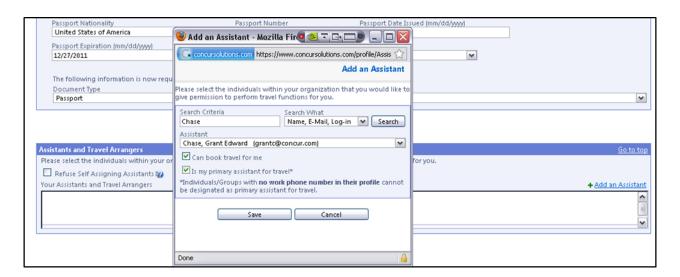
Hint: When searching, use the following format:

LastName, FirstName (no spaces).

For example: Smith, June

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to have this assistant included on any agency-generated emails about your trips. This will only occur if your Travel Management Company has configured your site to send information to your GDS profile.



Section 4: Make a Travel Reservation

Step 1: Make a Flight Reservation

How to...

- 1. On the **My Concur** page, click the **Flight** tab at the left side of the page.
- 2. Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi-Segment



Additional Information

If you have a car, hotel, limo, or rail to book without airfare, use the corresponding tabs.

- 3. In the **Departure City** and **Arrival City** fields, enter the cities for your travel.
- Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.
- If you need a car, select the Pick-up/Drop-off car at Airport checkbox.

When you type in a city, airport name, or code, Travel will automatically search for a match.

You can also select the appropriate **Departure** and **Return** times and time range. Travel searches before and after the time you select.

Depending on your company's configuration, you can automatically reserve a car, allowing you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.

If you need an off-airport car or have other special requests, you can make these requests on the **Car Results** page or you can skip this step and add a car from the **Itinerary** page.

Step 1: Make a Flight Reservation (Continued)

How to...

If you need a hotel, select the Find a Hotel checkbox.

- To search only fully refundable fares, select the REFUNDABLE only checkbox.
- 8. Select Search flights by Price or Schedule.
- 9. Click Search.

Additional Information

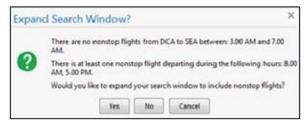
You can choose to search for the hotel by:

- Airport
- Address
- Company Location
- 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 a hotel from the **Itinerary** page.

The forward tab that you see on the search results screen will depend on which you select.

Depending on your company's configuration, you might be notified that there are non-stop flights, but they don't exactly fit the times you have entered. If you want, you can change your search criteria to include non-stop flights.



To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the right. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

You can also click the **more like this** link, and then select either **Outbound flight** or **Return flight** to view more options for the selected flight.

Step 1: Make a Flight Reservation (Continued)

How to...

10. Review the search results on the **Shop By** Fares tab, and then click **Show Details**.

11. Select any green (unoccupied) seat and position the mouse pointer over a seat to see the seat number.

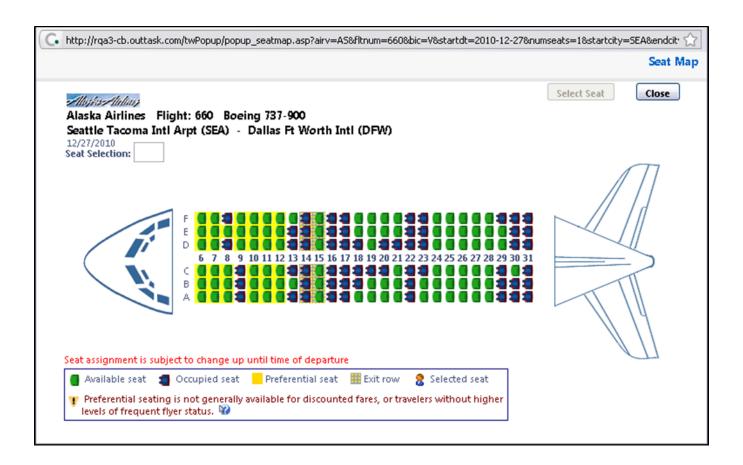
Additional Information

Click **show details** to expand flight information, to view fare rules and, if needed, to add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.

To select a seat, click the **View Seatmap** icon next to the flight. A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential.

Select preferential seats (highlighted in yellow) if you have preferred status on the selected airline. Your frequent flyer number must be in your Travel profile. If you select a preferential seat and this information is not in Travel, your seat request might not be honored.

Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.



Step 1: Make a Flight Reservation (Continued)

How to...

- 12. Click the appropriate seat to select it, and then click **Select Seat**.
- 13. Once you have made your seat selection, click **Close**. Repeat for all flights.
- 14. From the **Shop By Fares** tab, click **Reserve** to select your airfare.

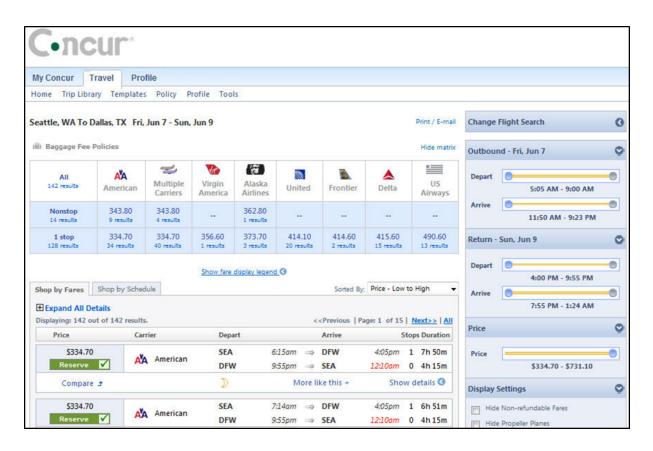
Additional Information

To change your seat, click the seat you prefer. Point to a seat to view the seat number.

After you select your seat for a flight, you can either click **Change Seat** or select the next flight in your reservation. Travel will prompt you to save your new seat selection.

Policy information appears next to the **Reserve** button. The **Reserve** buttons are color coded as:

- A *green* **Reserve** button indicates the fare is within policy.
- A yellow Reserve indicates the fare is outside of policy. If you select this fare, you must enter additional information. Yellow buttons will not appear if your company uses Concur Standard.
- A red Reserve button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager.



Section 4: Make a Travel Reservation (Continued)

Step 2: Select a Car

How to...

- If you selected Pick Up/Drop off Car at airport on the Flight tab, you will see the results for the car search.
- Select the appropriate rental car, and then click Reserve.

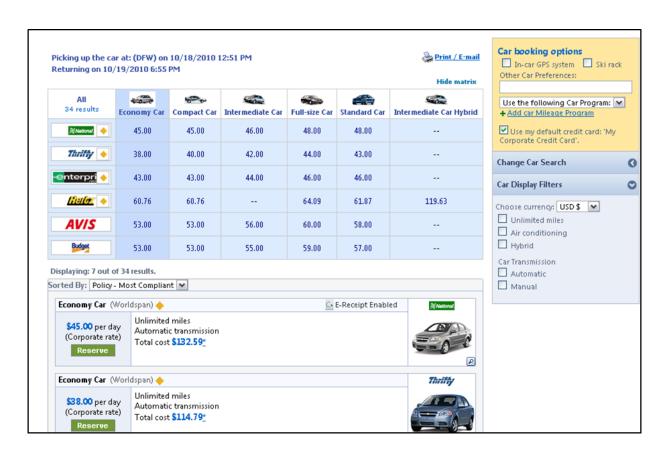
Additional Information

If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

You can sort the car results to help find your selection.

Yellow diamonds indicate preferred vendors and your preferred car type will be selected automatically.

Depending on your company's configuration, you might be able to select **In-car GPS system** or **Ski rack** under **Car booking options** on the right. Other preferences or car program ID numbers can also be added.



Section 4: Make a Travel Reservation (Continued)

Step 3: Select a Hotel

How to...

- If you selected the Find a Hotel option on the Flight tab, the hotel results appear after you choose your rental car.
- 2. To filter by hotel chain, , enter the chain name in the **With names containing** box next to the **Sorted by** box
- 3. Use the filter options to narrow your search by **Amenity** or **Chain**.
- 4. To filter by neighborhood, select the desired neighborhoods in the **Neighborhood** box on the right.
- 5. Click the **more info** link for a specific hotel to find more detailed information for the hotel.
- Click choose room to view room rates.
- 7. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Reserve**.

Additional Information

You can sort the list of hotels by **Preference**, **Price**, **Rating**, **Distance** and **Policy**.

Depending on your company's configuration, you might be prompted to provide the hotel information if you are booking a roundtrip overnight stay without a hotel.

To filter by multiple chains, in the **Hotel chain** box on right, click **hide all** and then select only the chains you want displayed.

A map of hotels appears at the top of the page. Your company's preferred hotels are indicated with pink dots.

The **Reserve** buttons are color coded as follows:

- A green Reserve button indicates the hotel rate is within policy.
- A yellow Reserve button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information. Yellow buttons will not appear if your company uses Concur Standard.
- A red Reserve button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved.

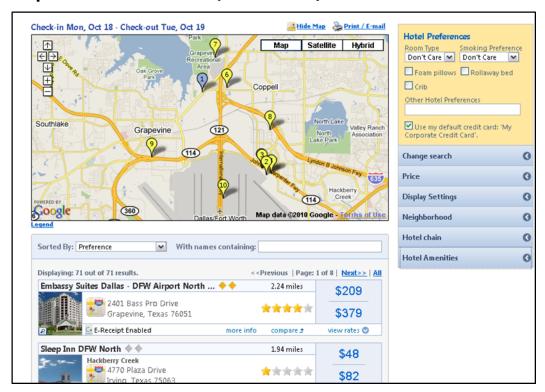
You will see a notification if a hotel is outside of policy. You can view the type of rate and room, as well as other information that is available from the agency system.

A *grey* or *yellow* diamond indicates that the hotel property is company preferred.

After clicking the **Reserve** button, the hotel confirmation page appears.

8. Review the information on the **Rate**details/Cancellation policy pop-up window,
click to agree, and then click **Continue**.

Step 3: Select a Hotel (Continued)



Step 4: Complete the Reservation

How to...

- Review the details of the reservation, and then click Next.
- On the Trip Booking Information page, enter your trip information in the Trip Name and Trip Description fields.
- 3. Click Next.
- 4. Click **Purchase Ticket** to finalize your trip.

Additional Information

From here, you can add or make changes to the car, hotel as well as change the dates of the flight. . Depending on your company's configuration you may be able to add Parking, Taxi or dining at this time.

The trip name and description data are for your record keeping. If you have any special requests for the travel agent, please enter them into the agent comments section. Some request may result in higher fees.

You will see the name and itinerary, along with the quoted airfare amount.

Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

How to...

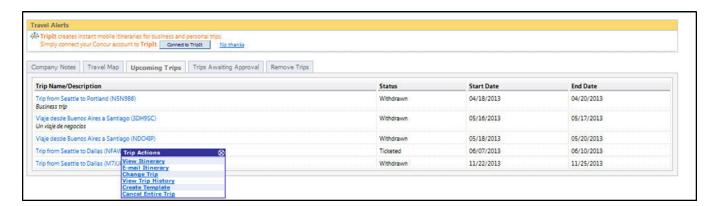
- At the top of the My Concur page, click Travel.
- 2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

Additional Information

Flight changes are available for e-tickets that include a single carrier.

If the trip is already ticketed but has not occurred, you can change the time and/or date of the flight. Your change options will be with the same airline and routing.

Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.



- 3. From the **Trip Actions** menu, click **Change Trip**.
- 4. On the **Itinerary** page, select the portion of the trip you want to change.

From the **Itinerary** page, you can:

- Email your itinerary
- Change seat
- Change the flight day or time for travel (you cannot change the airline)
- Add, change, or cancel parking
- Add, change, or cancel a taxi
- Add, change, or cancel car rental
- Add, change, or cancel hotel
- Add, change, or cancel dining

When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips.

- 5. To cancel your entire trip, click the **Upcoming Trips** tab.
- 6. From the **Trip Actions** menu, click **Cancel Trip**, and then click **OK**.

Section 6: Action Buttons and Icons

Button/Icon Description	
4	Airfare: Click to view your airfare booking information.
(2)	Car Rental: Click to view booking information for your car rental.
	Lodging: Click to view your lodging booking information.
×	Multiply: Reverses the exchange rate when working with foreign out of pocket transactions.
(2)	Rail: Click to view your rail booking information.
Reserve	Reserve: Reserves the selected trip details.
F	Seat map: Click to view the flight seat map.
•	Yellow Diamond: Indicates a company preferred vendor.