Concur Travel QuickStart Guide

Updating Your Travel Profile

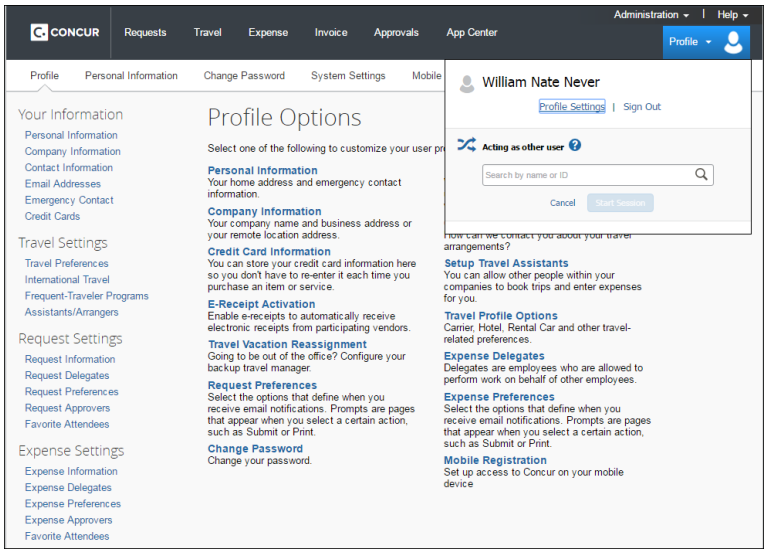
Before you use Concur's travel application for the first time, update your Travel profile. Even if you make no changes, you must ***save*** your profile before you can book a trip in Travel.

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

- Credit card
- Email options
- Password
- Personal preferences (name, address, emergency contact, credit card)
- Register for Concur for Mobile
- Travel preferences (air, hotel, car rental, rail preferences)
- Other preferences and settings (default home page, calendar, emails, accessibility mode)

To access the profile information:

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



Booking a Flight

From the **Concur Home** page, 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, respectively.

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

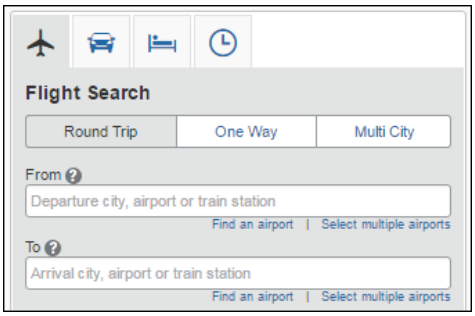
You can access the Flight tab (or Air / Rail) by doing the following:

- On the **Concur Home** page: On the menu, click **Travel**.
- On the **Concur Home** page: On the menu, click **Home**

  OR

  On the **Concur logo** (whichever applies).

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

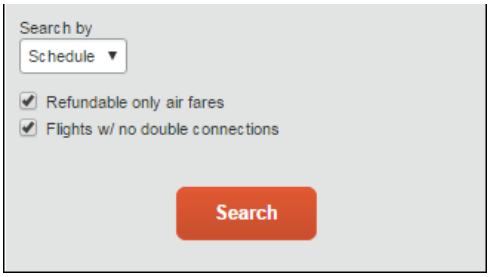


Step 1: Start the Search

1. Select one of the following types of flight options: Round Trip, One Way or Multi City
2. 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.
3. 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 appropriate time range.
4. 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:
   - 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.
5. If you need a car, click the **Pick-up / Drop-off car at airport** check box.

   - 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.
6. 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 a hotel later from your itinerary.

     NOTE: Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.
7. 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**.)

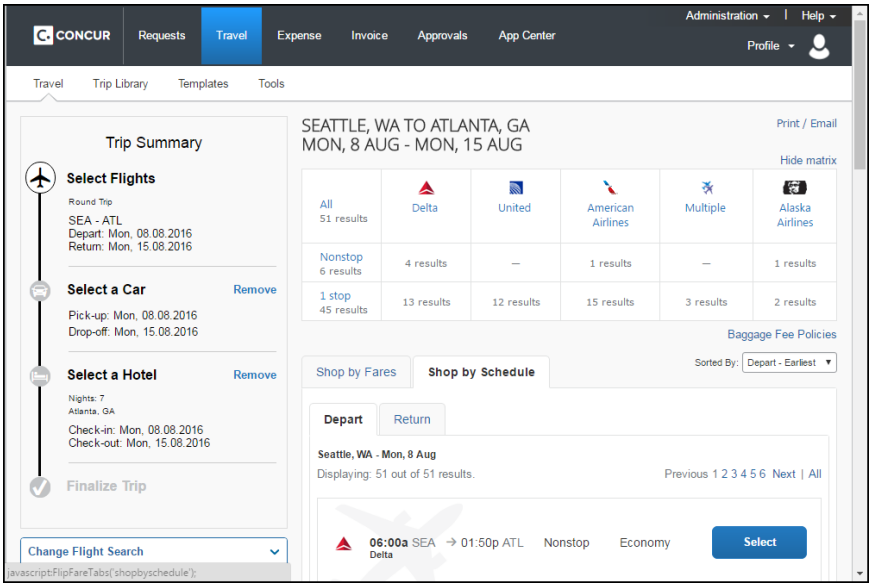
8. Click **Search**. The flight search results appear.

Step 2: Select a flight

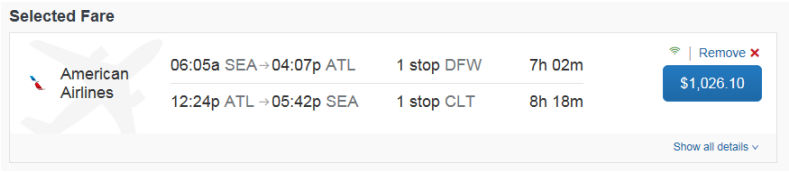
On the Flight Search results page:

- 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.

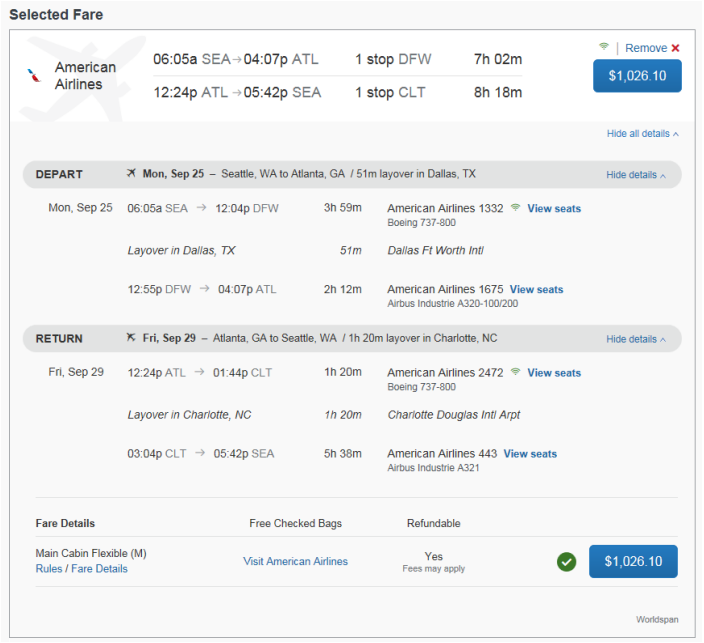
  NOTE: Use **Schedule** on the initial search to get the most results. **Price** will filter out options that due to airline or airfare rules, cannot be ticketed together. Once on the results page, you can click **Shop by Fares** tab to change the display mode. When clicking **Shop by Schedule** tab from original **Price** search, you will only change the display mode for the existing data, the filtered flight options will not appear, a new search is needed to retrieve the filtered flights.



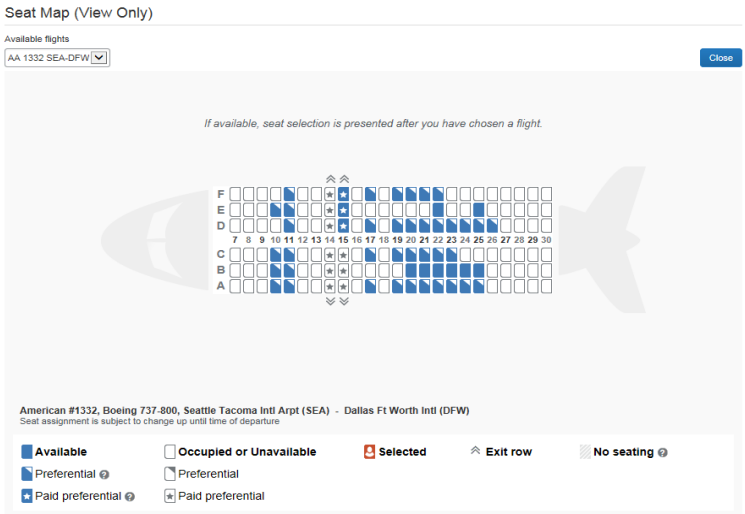
1. Click **Select** for the appropriate flight options.



2. Click the Show all details dropdown arrow, as needed to review the flight details.



NOTE: Depending on your airfare provider, you can click the **View seats** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**.



3. Click the fare amount button to select these flights.
4. On the **Review and Reserve Flight** page you can:
    - Review the flight details
    - Review information pulled in from travel profile or enter new information
    - Select frequent flyer programs
    - Review the price summary
    - Select your method of payment
5. Click **Reserve Flight and Continue**.

    Note: Once you click **Reserve Flight and Continue**, the booking process starts. The flights are put on hold in the Blue Ribbon Travel system and electronic messages are transmitted between Concur, Blue Ribbon and the airline – verifying selected airfare, membership numbers, seat requests (if applicable), etc. If you stop here, the flights will hold in the system for a few hours. You will need to finalize trip before a ticket is issued. If you do not complete the Finalize trip process, the booking will auto-cancel.

Step 3: Select a rental car

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

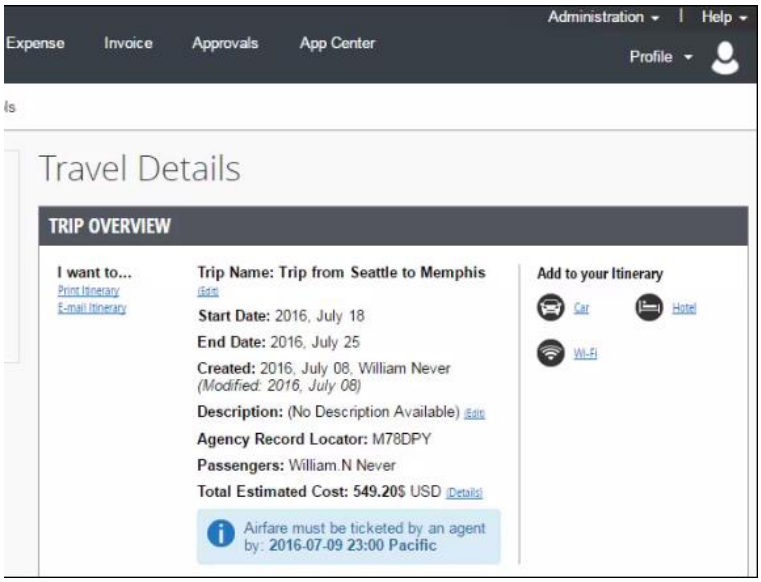
Step 4: Select a hotel

If you requested a hotel on the **Flight** tab (or **Air / Rail**) **Search**, 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.

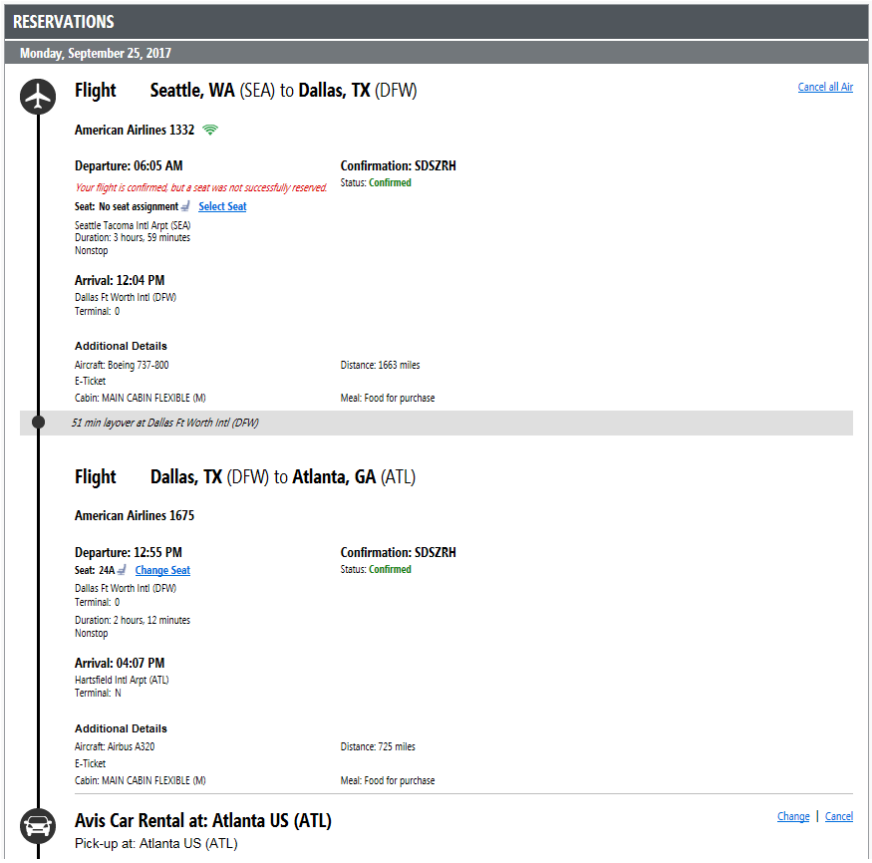
1. In the **Trip Overview** section:
    a. Review the information for accuracy.
    b. In the **I want to** section, print or email as appropriate.
    c. In the **Add to your Itinerary** section, add a car, hotel, Wi-Fi, etc., as needed.



2. In the **Flight** section:
    a. Verify the information for accuracy.
    b. Click **Select Seat** or **Change Seat** to select or change your seat option (depending on the airline).

    Note: Be aware not all airlines and airfare types allow pre-selection of seat assignments. If you have selected a *Basic Economy* airfare, you may see a seat map and be able to request a seat, but the airline will not confirm your request.

    c. Your company might allow you to change or cancel your flight from the itinerary page. If so, click **Change** or **Cancel** and then follow the prompts to change your outbound or return flight.
        i. 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.
    d. Click **Cancel all Air**, as needed

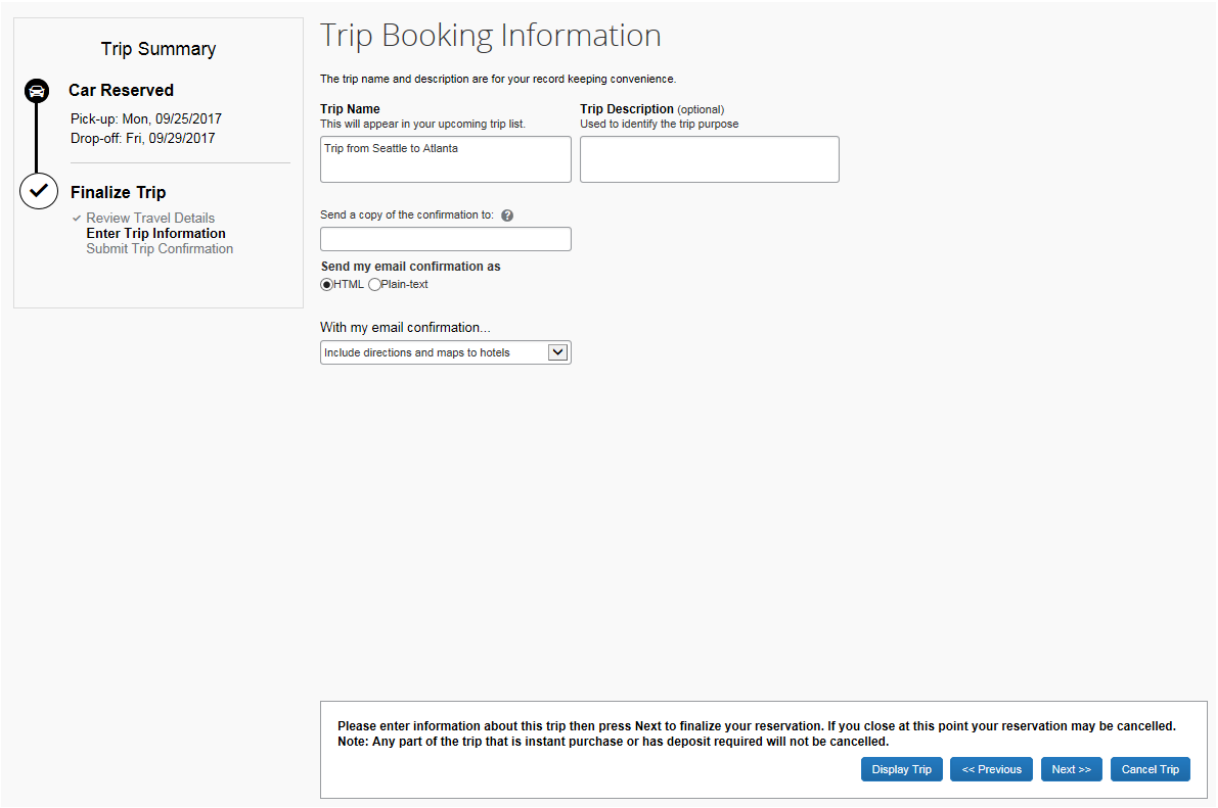


3. Review the remaining sections as necessary, and make the appropriate changes.
4. Review the **Total Estimated Cost** section.
5. Click **Next**.

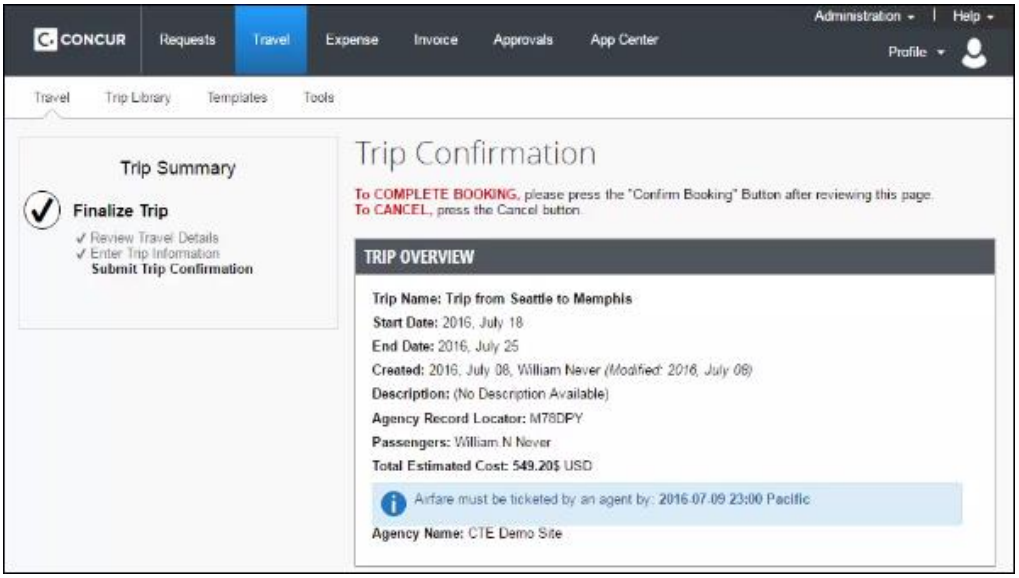
The **Trip Booking Information** page appears.

Step 6: Review the booking information

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



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** (optional).
3. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.
4. The traveler and travel arranger (if applicable) will automatically receive the email confirmation from Concur.
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.
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

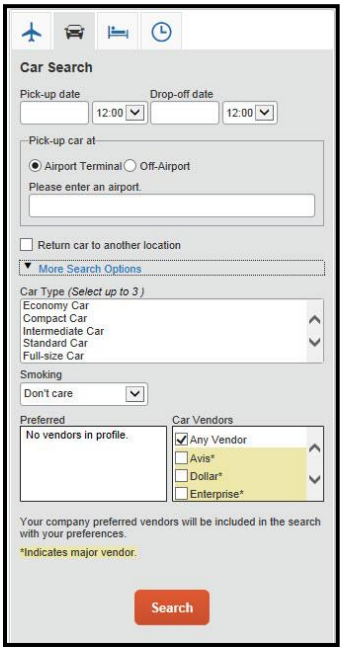
1. Click **Confirm Booking** to send your request to your manager for approval and Blue Ribbon for ticket processing.
2. Click **Finish**. The **Finished!** screen shows your confirmation number and information to contact Blue Ribbon Travel.
3. Click **Return to Travel Center**.

Note: if you stop the booking process at any point prior to clicking Confirm Booking, Concur will keep your Unfinished Trip on a temporary hold for 8 hours before auto-cancelling the reservation. Concur will announce that you have an Unfinished Trip in the alert section and in your trip library. Concur will also send a reminder email after 6 hours. If the booking is not 'finished' within 8 hours (from start to finish) it will be auto cancelled. Cancel penalties will apply to any non-refundable hotel or car selections within the Unfinished Trip.

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 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 your company's configuration, you may be able to have a car delivered to or picked up from your company location)
2. Select **Return car to another location**, as needed. Additional fields appear. Choose the appropriate 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.

Step 2: Filter the results (as needed)

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

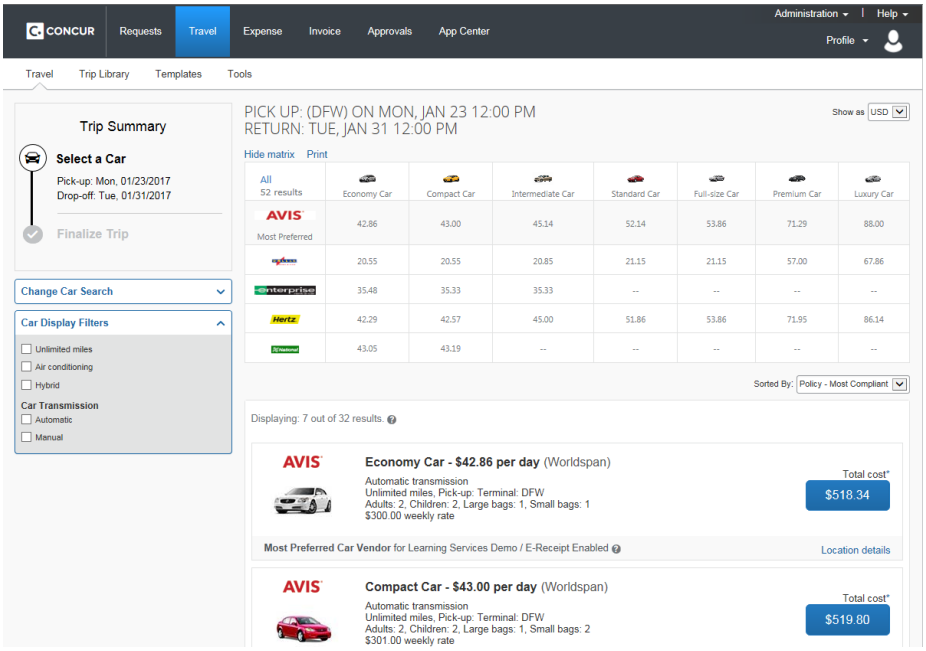
Left side of the page: Use the show ⌄ and hide ⌃ arrows as needed.

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

- To filter by car size, click the cell with the car size. The search results below will reflect that choice.
- To filter by 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.

Step 3: Review the results

Note that the color of the **Total cost** button reflects policy compliance.



- 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 **Location details** for more information about the available options.

Step 4: Select the rental car

1. Click **Total cost amount** to select the car option.

   The **Review and Reserve Car** page appears:

   - Review the details for accuracy.
   - Review travel information pulled in from your profile or enter new information.

2. Click **Reserve Car and Continue**.

   - If you requested the car using the 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 follow the steps to complete the booking.

   Note: If the booking is not finalized, Concur will hold your Unfinished Trip for 8 hours. To avoid auto-cancellation, you must finalize the trip by following the screen prompts at bottom of Review pages. Upon completion, you will see a "Finished" message on the screen and Concur will automatically send you an online booking confirmation email.

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.
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.

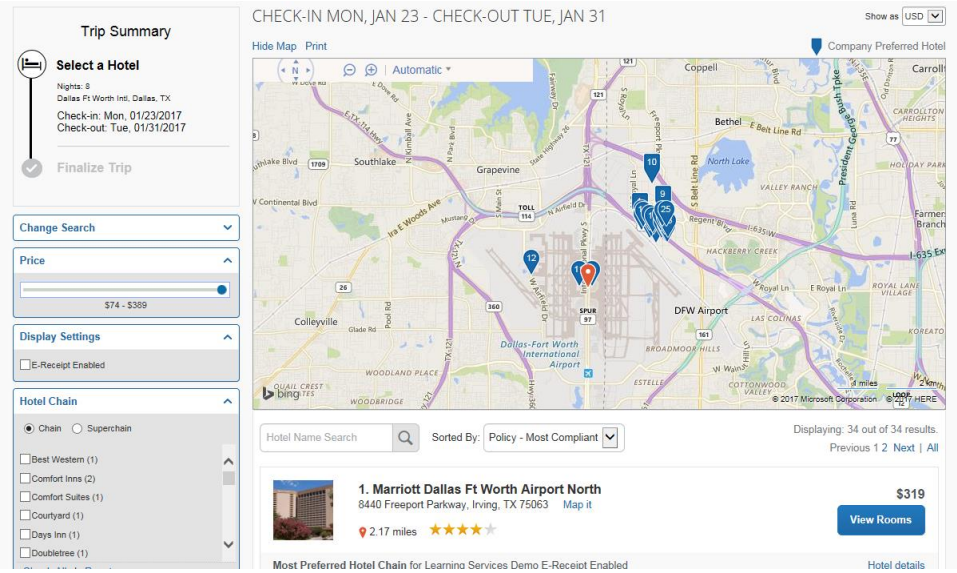
Step 2: Change and filter your search (as needed)

There is a filter set on the left side of the page. Use show and hide arrows, 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 appropriate hotels.
- In the **Hotel Amenities** area, select the appropriate options.

Step 3: Review the hotel map (as needed)

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

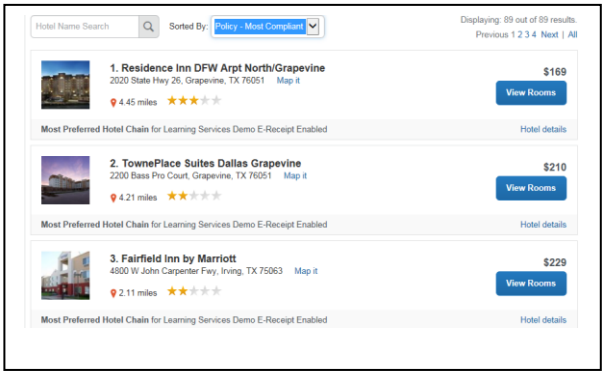


Step 4: Sort the search results (as needed)

Below the map, use the **Sorted By** list to sort the results. Enter hotel names, as needed.

Step 5: Review the results

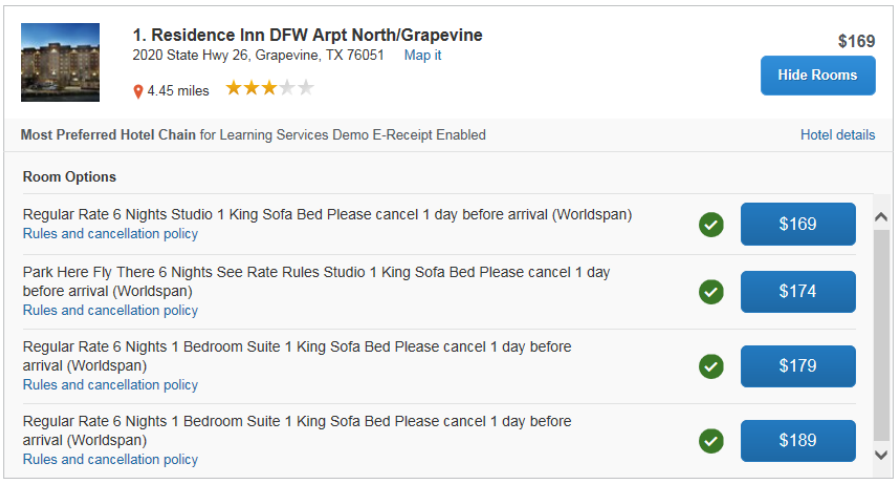
A picture as well as the name, address, rating stars, and price range appears.



1. Click the picture to see more images.
2. Click **Hotel details** to see street address, cancellation policy, and property information.
3. Click **View Rooms** to see:
   - The available room options and rates
   - Other amenities per room/rate
   - Rules and cancellation policy

Step 6: Select the hotel room

6. Click the **Cost** button next to the room that you want to reserve.



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 summary.
- Select a method of payment, if available, as defined by your company's configuration.
- Review and accept the rate details and cancellation policy.

7. Select the **I agree to the hotel's rate rules, restrictions, and cancellation policy** check box.
8. Click **Reserve Hotel and Continue**. Your **Travel Details** page (itinerary) displays.

Important Notes:

Once you click **Reserve Hotel and Continue**, the reservation process starts. The hotel is put on hold in the Blue Ribbon Travel system and electronic messages are transmitted between Concur, Blue Ribbon and the hotel. Hotel cancellation penalty rules apply from this point forward.

Even though the reservation has started, it is on hold until you complete/finalize the trip via Concur. If you do not complete the Unfinished Trip, within an 8 hour window, Concur will auto-cancel the reservation and the hotel will charge your credit card if you are within a penalty window.