

# CONCUR TRAVEL HANDBOOK





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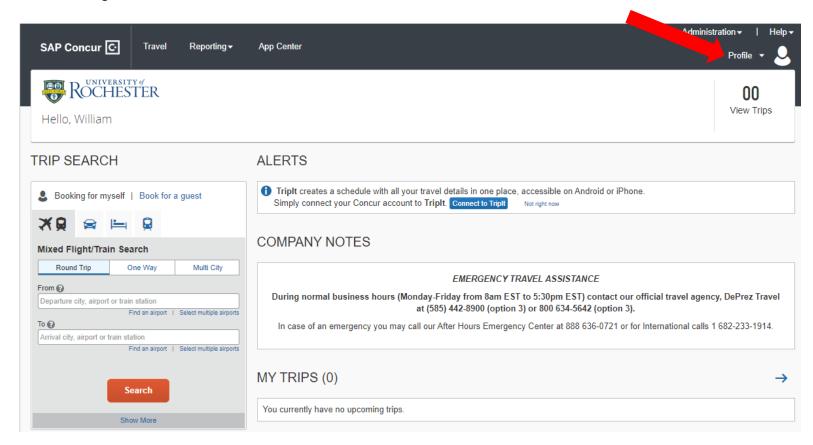
# **Booking with Concur**

Concur is an online booking tool that makes booking your travel easy and convenient. The benefit of booking through Concur is up to date travel notices, University Discounts, easy access to travel documents, centralized profile information. (i.e., frequent flyer numbers, membership numbers etc....) This document will cover how to build/update your travel profile, book air, car and hotels.

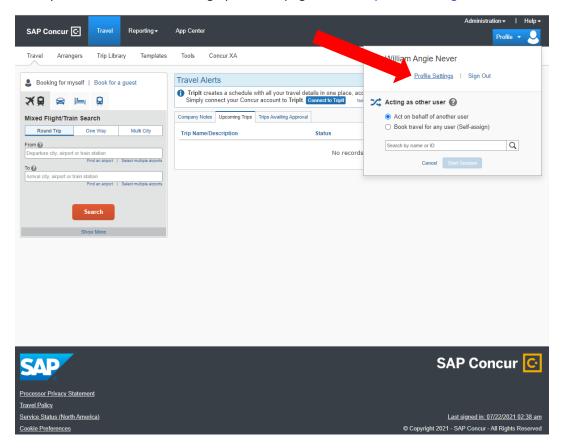
Let rock and roll!

# Your travel profile:

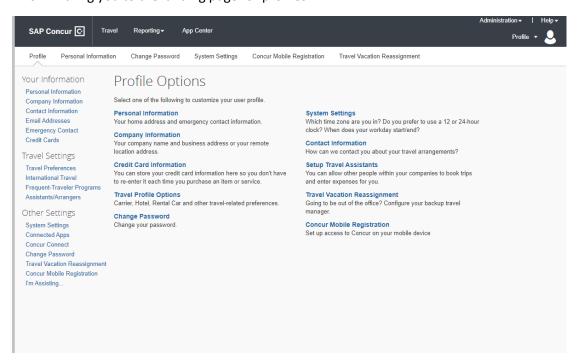
From your travel profile you can update information such as personal, company cost center, credit cards. You can update your travel settings, including your preferences for upcoming trips, or add an assistant to help you book travel. When you first log into Concur, it will automatically take you to a landing page (or home page). To access your travel profile, click on the word "profile" located upper right.



Once you click on this it will bring up a menu page: click on "profile settings"



This will bring you to the landing page for profiles.



You will find the most common profile task on the profile options page:

# Profile Options

Select one of the following to customize your user profile.

#### Personal Information

Your home address and emergency contact information.

#### **Company Information**

Your company name and business address or your remote location address.

#### **Credit Card Information**

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

#### **Travel Profile Options**

Carrier, Hotel, Rental Car and other travel-related preferences.

#### **Change Password**

Change your password.

Or you can use the menus on the left to select a setting to update.

In the "your information" section be sure to review & update your Personal, company and contact information. Verify your email address, add an emergency contact & add or update any credit card information.

Your Information

Personal Information Company Information Contact Information Email Addresses Emergency Contact

Travel Settings

Credit Cards

Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers

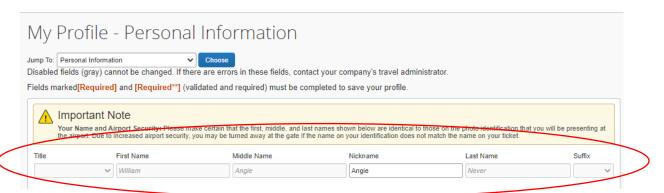
Other Settings

I'm Assisting..

System Settings
Connected Apps
Concur Connect
Change Password
Travel Vacation Reassignment
Concur Mobile Registration

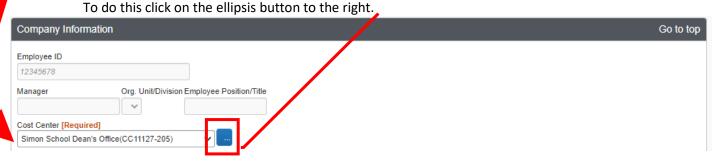
#### Personal Information:

Verify your personal information. Make certain that the first, middle, and last names shown are identical to those on the photo identification that you will be presenting at the airport. If it is incorrect, contact your SAP Concur site admin, Erin Johnson, to have it updated.



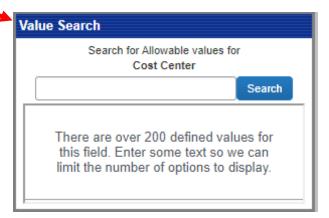
#### Company Information:

Please note that you must add your cost center to this section.



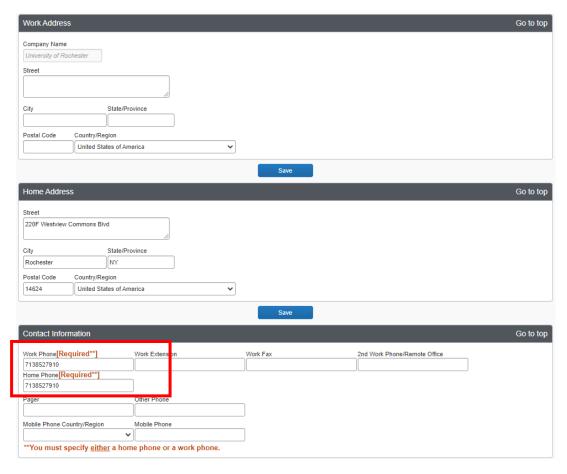
This will bring up the value box

You can search for your cost center either by number or name. If you are unsure what your cost center number is, please contact your SAP Concur site admin, Erin Johnson. Once you have located your cost center, click on select to add or update your profile.



#### Contact information:

Verify your work, home address(es), and your contact information. Required fields are labeled in red. (please note you will not be able to save your profile unless all required fields are filled in)



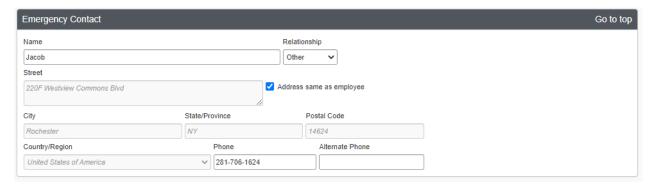
#### **Email Address:**

In the email address section, you can add and verify your email address(es). Note the first email address must be your university email address. You are able to add additional email addresses such as personal, family or coworkers that you would like to Cc on your travel bookings. (Do not add admin address here)



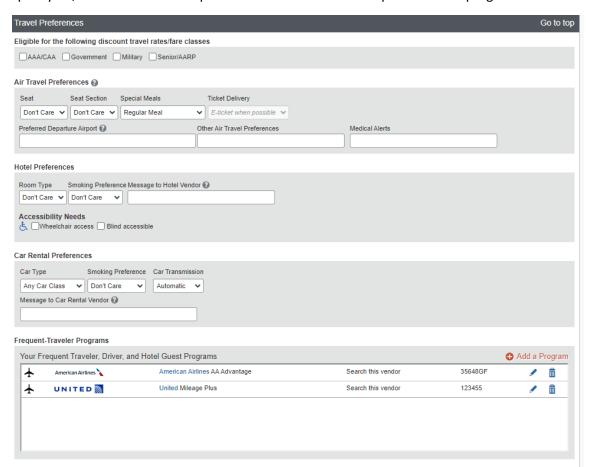
## **Emergency Contact:**

Complete the emergency contact fields as needed.



#### Travel Preferences:

In the travel preference section, you can select your discount travel rates and fare classes. You can specify air, hotel and car rental preferences as well as add frequent traveler programs.

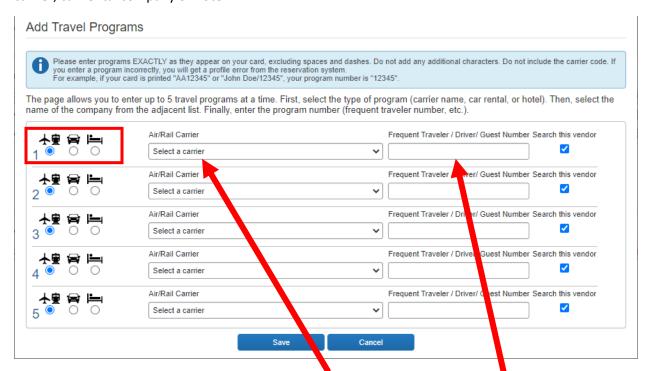


#### Add a Frequent Traveler Program:

To add a frequent traveler program, click on "Add a Program".



This will bring up the Add travel programs screen. Use the radio buttons to select if this is an air or rail carrier, car rental company or hotel.



Then select the appropriate vendor from the drop-down list and enter the program number. Continue adding your frequent traveler programs as needed and the click on Save.

Note: make sure your profile name and program name are identical. If you enter a program incorrectly, you will get a profile error from the reservation system.

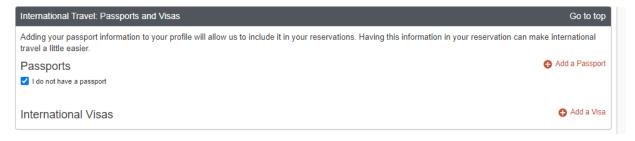
#### TSA Secure Flight:

In the TSA secure flight section, verify the required gender and date of birth fields. Complete the DHS Redress number and TSA Precheck Known traveler number fields as needed.



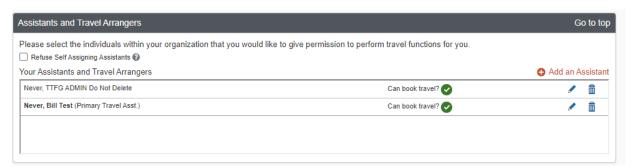
#### International Passport/Visa Information:

From the international passport section, add your passport or international visa information. This can make international travel a little easier. If you do not have a passport or do not wish to add it, please make sure to check mark "I do not have a passport". The system will not allow you to save the profile unless a passport is present or the box has been checked.

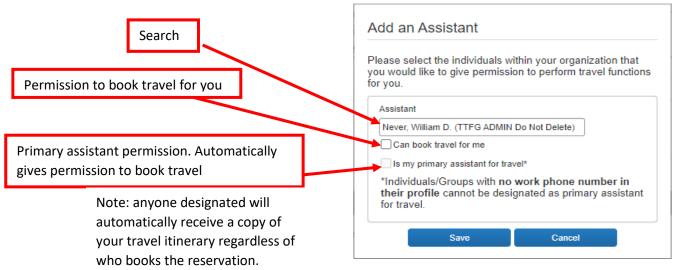


#### Assistants & Travel Arrangers

From the "Assistants and Travel Arrangers" section you can assign someone to book travel for you. Note: An assistant or travel arranger must be an existing travel (Concur) user. Individuals or groups with no work phone number in their profile cannot be designated as primary assistants for travel. To add an arranger or assistant click on "add an assistant"

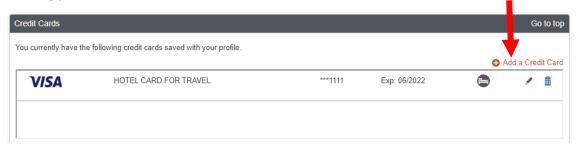


Search and select the individuals within your organization that you would like to give permission to perform travel functions for you. Select the check boxes to allow them to book travel for you or assign them as your primary assistant for travel. Click on Save when completed.

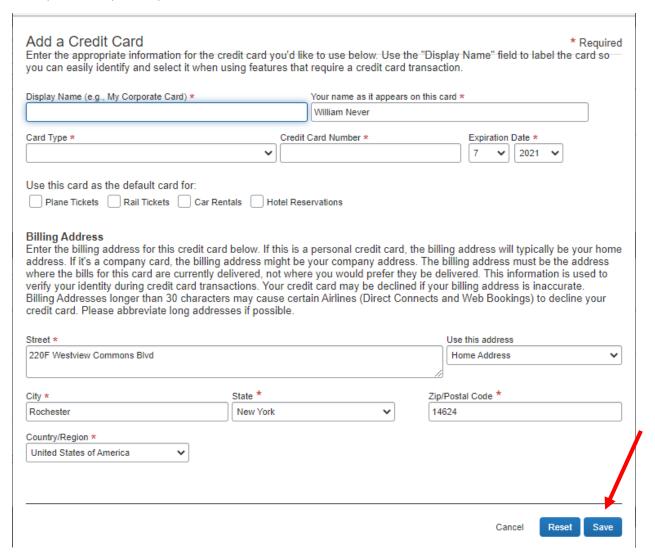


#### Credit Cards:

From the credit card section, you can add or update the credit card you plan to use to book hotels. Please note that all air travel will be billed directly to your organization. Storing your credit card in your profile is completely optional, as you will also have the opportunity to add a credit card during the booking process. Click on "add a credit card"

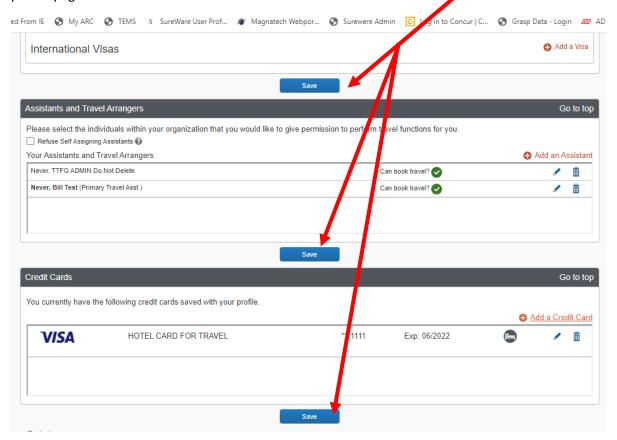


On the credit card page, you will enter the name on the credit card, card type, card number, expiration date and billing address. You will need to designate this card as your default for hotel bookings only. After you have updated your card information, click on "Save"



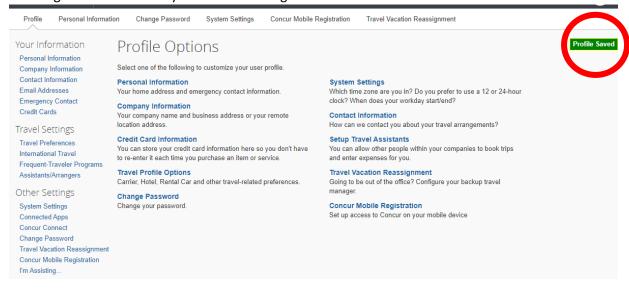
# Saving your Profile:

Once you have completed your travel profile updates, click on any of the "save" icons located on the profile page.



Once you have successfully saved your profile you will see in green and white "Profile Saved". You are now able to book travel using the U of R online booking tool.

Note: this will automatically update the travel system so your profile will also be available to DePrez travel agents to assist with your travel bookings.

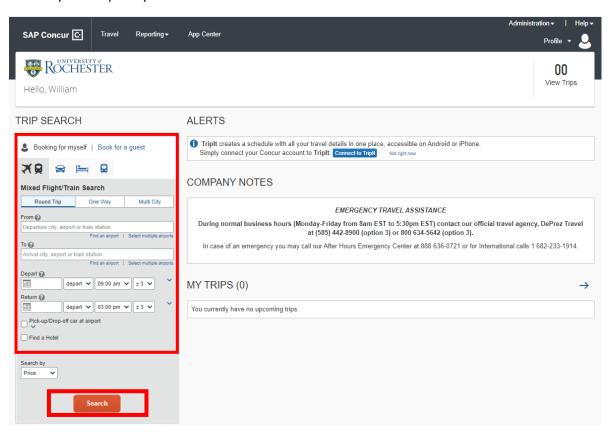


# **Booking Flights**

Concur makes it easy to book flights for an upcoming trip.

#### Trip Search

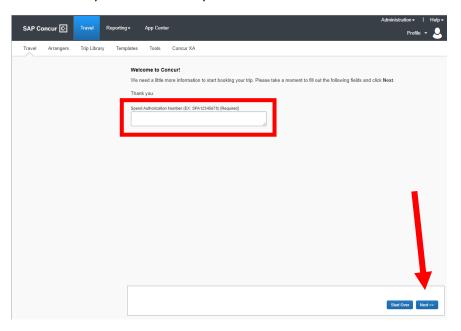
- 1. From the Concur home page, enter your search criteria, such as type of trip, departure city and date, and return city and date.
- 2. you can also specify whether you need a car and/or hotel for your trip.
- 3. After you complete your search details click on "Search"



#### Spend Authorization (SPA)

You will be prompted to enter your Spend Authorization number, better known as the SPA number. If you have not obtained your SPA you must exit the system and return when it is available. You will not be able to proceed past this screen without your Spend Authorization number.

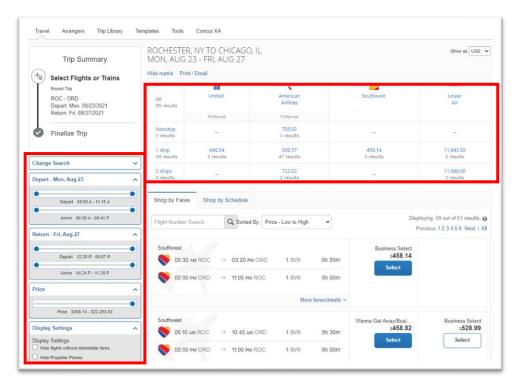
- 1. The spend authorization number will begin with SPA followed by 8 numbers.
- 2. Once you have entered your SPA click on "Next"



# Flight Results

You will see a list of available flights on the **Depart** tab.

- To filter the results, select a column, row, or cell in the Airline grid at the top of the Results page or you can use the sliding scales on the left.
- Scroll down to view more results



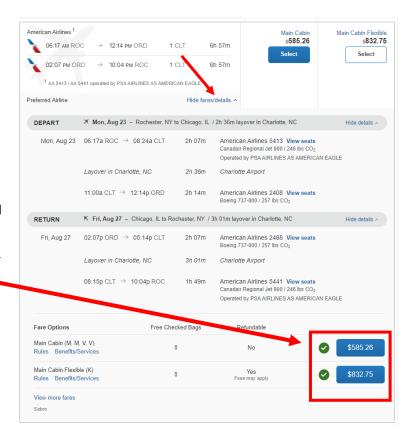
# Selecting Your flights

The Shop by Fares tab displays your selected flight options. You can use the Shop by Schedule tab to view results by flight times.

By clicking on "Fare Details" this will provide a breakdown of the flight details as well as the available fares and rules.

If you want to view the available seating for the flight, click on "View seats" to open a popup window that displays the seating configuration. Depending on the airline, you can select your desired seat for the flight.

When you are ready to select your flight, click on the fare amount.

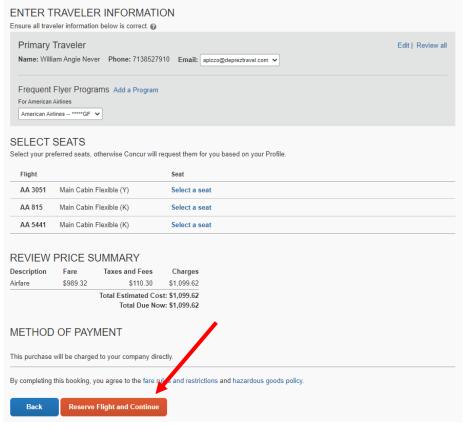


#### Review and Reserve Flights

In the Review and Reserve flights section, review your flight itinerary.

Scroll down to review the seat map, review the price summary information.
Please note the method of payment is automatically set to bill directly to U of R.





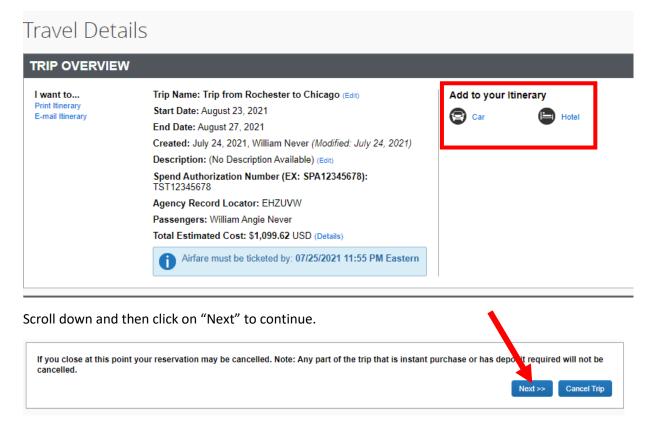
Verify your traveler information is correct. If you did not enter your frequent flyer program information in your profile you may do so here by clicking "add a program"

After you have reviewed the fare rules and restrictions, click on "Reserve flight and Continue"

#### Travel Details

You will see your complete travel itinerary. From this page you can also choose to add a car or hotel to your itinerary.

If you selected the options to book a car and/or a hotel on the initial search page, you will be prompted to select a car or hotel for your trip before you see the "Travel Details"



Note: a pop-up window will notify you that your trip does not have any car or hotel reservations. Confirm that you do not want any additional reservations by clicking ok.



#### Trip Booking Information:

On the Trip booking Information page, notice that the Trip Name is based on the departure and arrival cities. You can edit the Trip Name as needed. You can also provide a Trip Description and enter who you would like to send a copy of the confirmation to, if applicable. Then scroll down and click on "Next"

# Trip Booking Information The trip name and description are for your record keeping convenience. Trip Name Tris Will appear in your upcoming trip list. Trip from Rochester to Chicago Send a copy of the confirmation to: Send my email confirmation as Sent Trip Name Send my email confirmation as Sent Trip Description (optional) Used to identify the trip purpose Send my email confirmation as Sent Trip Description (optional) Send my email confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Sent Trip Description (optional) Send a copy of the confirmation as Trip Description (optional) Send a copy of the confirmation as Trip Description (optional) Trip Description (optional) Send a copy of the confirmation as Trip Description (optional) Send a copy of the confirmation as Send a copy of the confirmation as Trip Description (optional) Send a copy of the confirmation as Trip Description (optional) Trip De

# **Trip Confirmation**

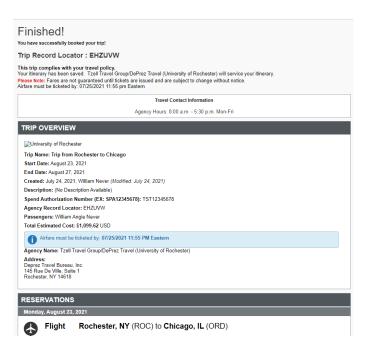
To finalize your reservation process, scroll down and click on "Purchase Ticket". Please note if you exit from

this page your trip will not be processed and no ticket will be issued. Make sure to "Purchase ticket"



#### **Finished**

Before exiting the system insure you have reached the final page that states "Finished" at the top. Your reservation has now been submitted for ticketing and you will receive a confirmation shortly after this. You may now exit out and return to your travel home page.

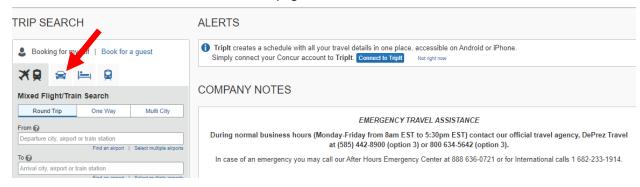


# **Booking Cars**

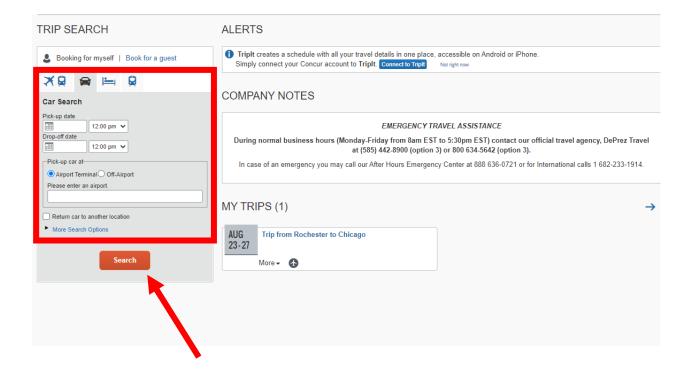
With some trips you may require a car but not airfare.

#### Trip Search

1. To book a car, from the Concur home page click on the "CAR" tab



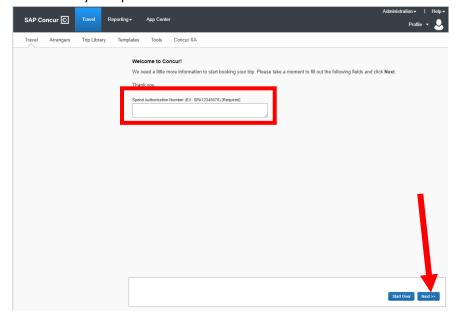
- 2. Enter your search criteria, such as pick- up and drop-off dates, location and other search options.
- 3. Then click on Search



#### Spend Authorization (SPA)

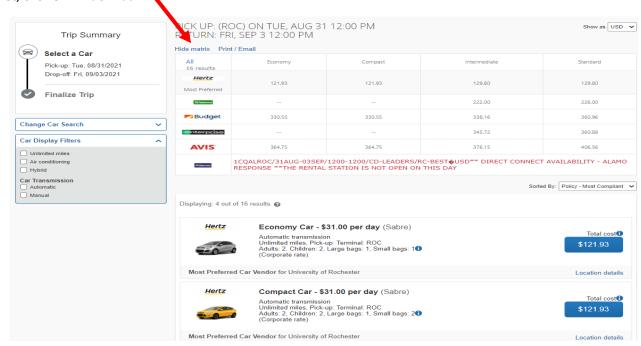
You will be prompted to enter your Spend Authorization number, better known as the SPA number. If you have not obtained your SPA you must exit the system and return when it is available. You will not be able to proceed past this screen without your Spend Authorization number.

- The spend authorization number will begin with SPA followed by 8 numbers.
- Once you have entered your SPA click on "Next"



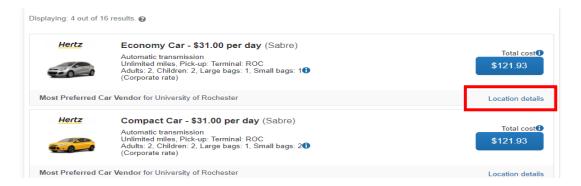
#### Filtering Search Results

Review the car search results. To filter the results, select a column, row, or cell in the grid at the top or use the options on the left side of the screen. To hide the results matrix and view more of the car results list, click on "Hide Matrix"



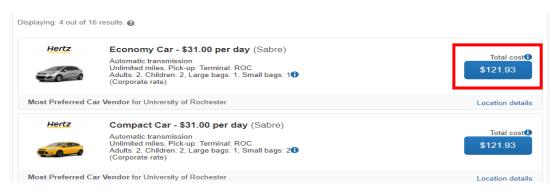
#### **Location Details**

Use the location details link to view more information about the rental car.



#### Confirming a Reservation

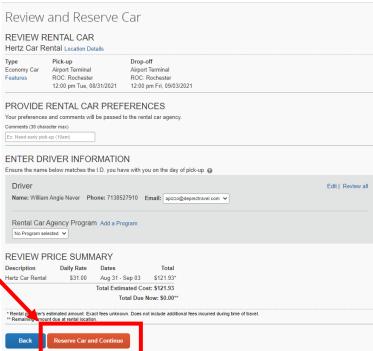
To choose a car, click the fare amount.



#### Review and Reserve

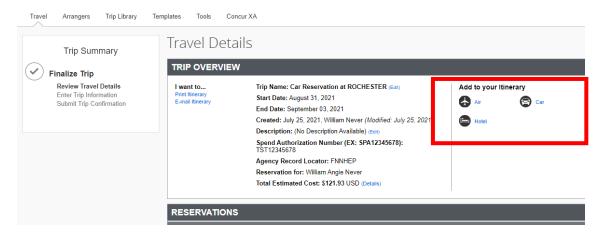
You will see your complete car rental itinerary and you can add other information for the car rental, including car preferences and driver information.

Click on "Reserve Car and Continue"



#### **Travel Details**

You will see your complete travel itinerary. From this page you can also choose to add an additional car, hotel or air to your itinerary.

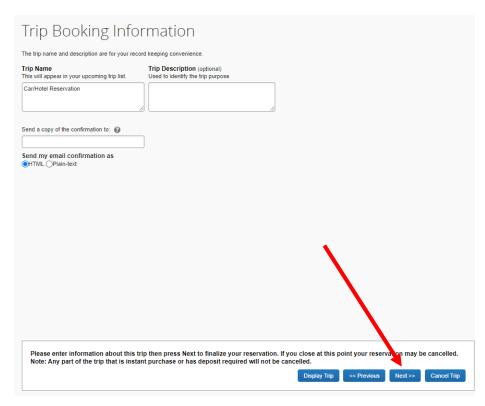


Scroll down and then click on "Next" to continue.

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.

# Trip Booking Information

On the Trip booking
Information page, notice
that the Trip Name is
based on the departure
and arrival cities. You can
edit the Trip Name as
needed. You can also
provide a Trip Description
and enter who you would
like to send a copy of the
confirmation to, if
applicable. Then scroll
down and click on "Next"

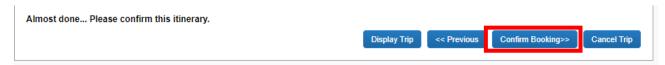


Next >>

Cancel Trip

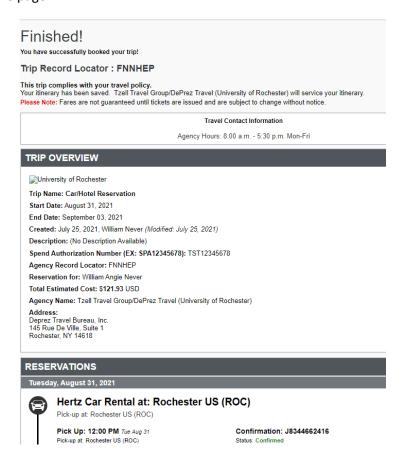
#### **Trip Confirmation**

To finalize your reservation process, scroll down and click on "Confirm Booking". Please note if you exit from this page your trip will not be processed and car reservation will not be confirmed. Make sure to "Confirm Booking"



#### Finished

Before exiting the system insure you have reached the final page that states "Finished" at the top. Your reservation has now been submitted for ticketing and you will receive a confirmation shortly after this. You may now exit to your travel home page.

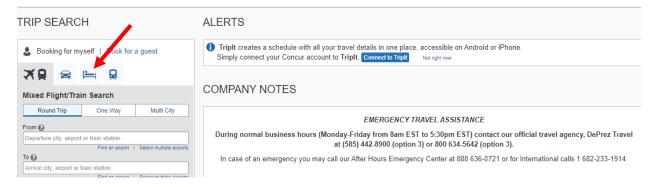


# **Booking Hotels**

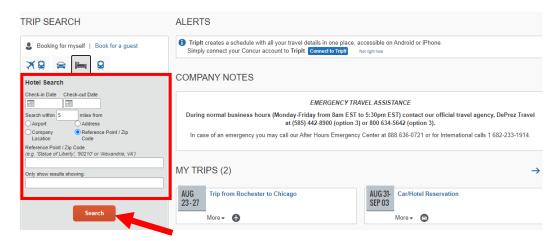
Concur makes it easy to book a hotel for an upcoming trip.

#### Trip Search

1. To book a hotel, from the Concur home page click the "HOTEL" tab.



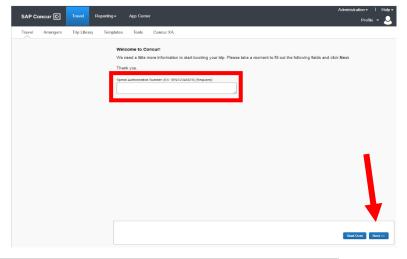
2. Enter your search criteria such as check-in and check-out dates, location and other search options, and then click on "Search".



#### Spend Authorization (SPA)

You will be prompted to enter your Spend Authorization number, better known as the SPA number. If you have not obtained your SPA you must exit the system and return when it is available. You will not be able to proceed past this screen without your Spend Authorization number.

1. The spend authorization number will begin with SPA followed by 8 numbers.

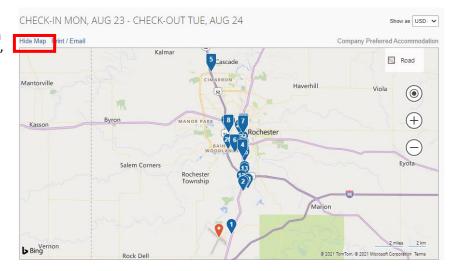


2. Once you have entered your SPA click on "Next"

## Hotel Results Page

On the Hotel Map, the numbered icons are the hotels located within your specified search radius

To hide the map and view more of the search results, click "Hide Map"

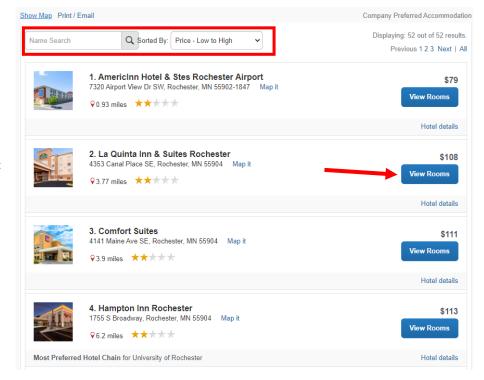


#### Filtering Results

Review the hotel search results. To Filter the results, use the "Sorted By" fields above the list.

#### Room Details

To view more details and to select a specific room type, click on "View Rooms"



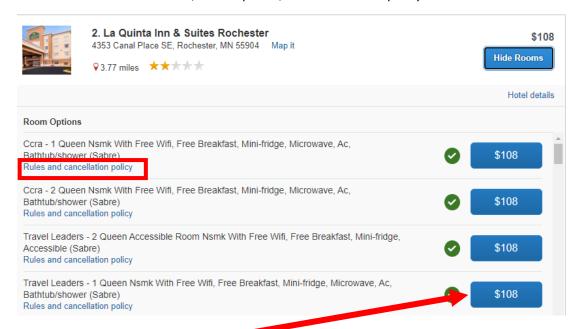
# Company Preferred

On some hotels in your search result, you will see them listed as Most Preferred or Preferred. These are the hotels that U of R has special discounts with. It is important, when possible, to utilize these hotels.



#### Reserving a room

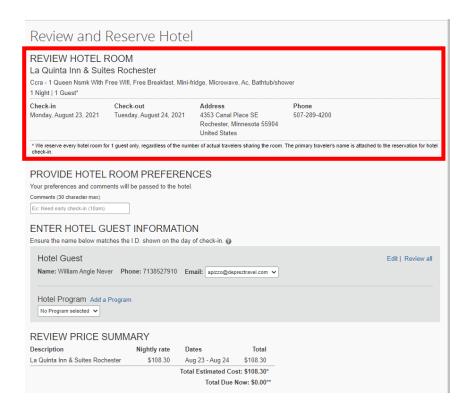
Review the hotel information, room options, and cancellation policy.



To reserve a room, click the price

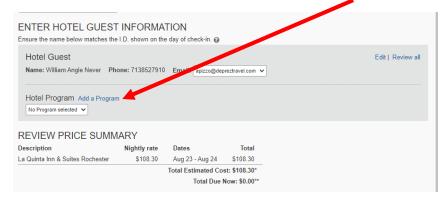
#### Review and Reserve Hotel

You will see your complete hotel itinerary and can review the details.



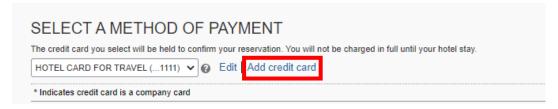
#### **Hotel Guest Information**

Review your personal information for accuracy. Here you are able to also add any program information that you may not have added to your profile. Click on "Add a Program"



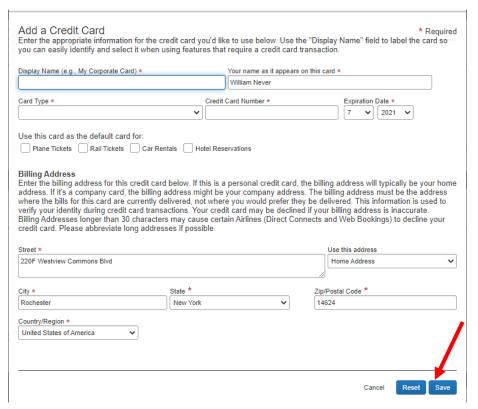
## Method of Payment

Please note you must provide a credit card to book a room reservation. If you have updated your profile with a credit card it will automatically prepopulated as the method of payment. If you have not stored a card in your profile, click "add a credit card"



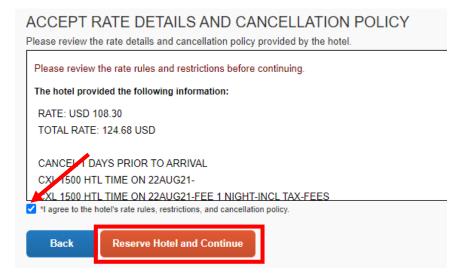
#### Adding a credit card

On the credit card page, you will enter the name on the credit card, car type, car number, expiration date and billing address. You will need to designate this card as your default for hotel bookings only. After you have updated your card information, click on "Save"



# Rate Details and Cancellation Policy

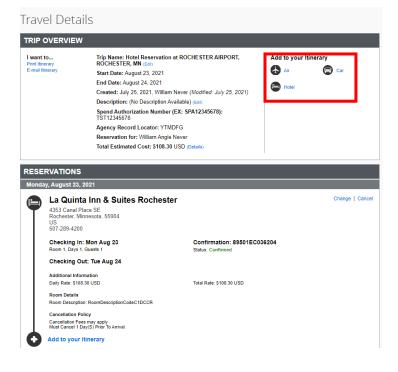
To proceed with your hotel booking you must scroll down and select the check box to agree to the hotel's rate rules, restrictions, and cancellation policy



#### Click on "Reserve Hotel and Continue"

#### **Travel Details**

You will see your complete travel itinerary. From this page you can also choose to add an additional hotel, car or Air to your itinerary.



Scroll down and then click on "Next" to continue.

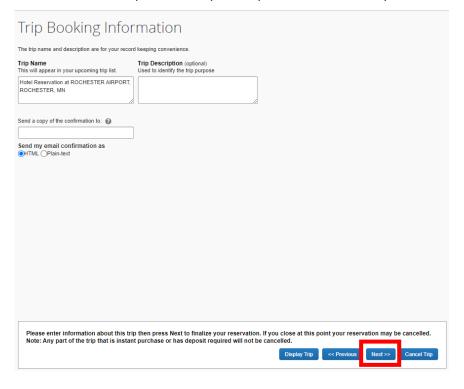
If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Cancel Trip

#### Trip Booking Information

On the Trip booking Information page, notice that the Trip Name is based on the trip type and arrival cities. You can edit the Trip Name as needed. You can also provide a Trip Description and enter who you

would like to send a copy of the confirmation to, if applicable. Then scroll down and click on "Next"



# Trip Confirmation

To finalize your reservation process, scroll down and



click on "Confirm Booking". Please note if you exit from this page your trip will not be processed and hotel reservation may not be confirmed. Make sure to "Confirm Booking"

#### **Finished**

Before exiting the system insure you have reached the final page that states "Finished" at the top. Your reservation has now been submitted for ticketing and you will receive a confirmation shortly after this. You may now exit out to the system and return to your travel home page.

