Concur User Manual

corporate travel
management

Concur User Manual

Concur

corporate travel
management

Concur User Manual

Concur: Logging In

corporate travel
management

CTM: Online Team

Logging in to Concur

To log in to the Concur Online booking tool, first navigate to the CTM portal page for your company. (Screenshot below) Then click on the green "Go to Concur" button.

That will take you to the page shown below. Just enter your username and password provided to you by CTM.

If you have forgotten your username or password just use one of the links below the login button.
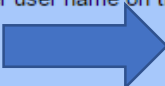
Online Support

Concur: Search for Flight

Search for a Flight in Concur

Searching for a flight in the Concur online booking tool is simple. The first thing you will need to do is log in to Concur.

Flight searches can be done directly from the Concur Home pate. Just enter your search information and click Search,

To add a hotel or car to your trip, use the "Pick-up/Drop-off car at airport" checkbox or the "Find a Hotel" checkbox.

You can search by price or by Schedule.

Searching by schedule will return results closer to the times you requested. Searching by price will return the lowest cost results.

On the flight selection page, there will be several filters you can use to refine your search. When you have found the flight you want just click the radial button for the flight you want. If you searched by schedule, you will be promted to pick out a flight for each leg of your trip.

SEATTLE, WA TO LOS ANGELES, CA
WED, SEP 30 - THU, OCT 1

Print / Email

Show matrix

🛄 Baggage Fee Policies

Show fare display legend

Shop by Fares | Shop by Schedule

Sorted By: Depart - Earliest ▼

Caution: Upon occasion Frontier and Alaska Airlines offer unique fares indicated as "WebDirect" in the fare details. They are instant purchase, non-refundable and unable to be voided. Also Southwest Airlines and Frontier are instant purchase and unable to be voided.

Outbound | Return

Seattle, WA - Wed, Sep 30

Displaying: 26 out of 33 results. ❔

<< Previous 1 2 3 Next >> | All

	Carrier		Depart			Arrive	Stops	Class	Seat Map
○ Starting From: $176.20	✈	Virgin America #1780	SEA	07:00 am →	LAX	09:35 am	0	Economy	🛋
	2h 35m; Airbus Industrie A320-100/200; (Sabre)								
○ Starting From: $236.70	▲ ▲	Delta #2397 Delta #2306	SEA SLC	07:11 am → 11:00 am →	SLC LAX	10:10 am 11:55 am	0 0	Economy Economy	🛋 🛋
	◆ ◆ 4h 44m; Boeing 757-200, Boeing 737-800 (winglets); (Sabre)								
○ Starting From: $260.70	▧ ▧	United #294 United #1960	SEA SFO	07:17 am → 10:45 am →	SFO LAX	09:42 am 12:20 pm	0 0	Economy Economy	🛋 🛋
	◆ ◆ 5h 3m; Airbus Industrie A319, Boeing 737-800; (Sabre)								

Here is an example of selecting a second flight in an itinerary.

SEATTLE, WA TO LOS ANGELES, CA
WED, SEP 30 - THU, OCT 1

Print / Email

Show matrix

Baggage Fee Policies   Show fare display legend

Shop by Fares | Shop by Schedule   Sorted By: Depart - Earliest ▼

Caution: Upon occasion Frontier and Alaska Airlines offer unique fares indicated as "WebDirect" in the fare details. They are instant purchase, non-refundable and unable to be voided. Also Southwest Airlines and Frontier are instant purchase and unable to be voided.

Chosen Carriers

Outbound

◉ Starting From: $176.20	Virgin America #1780	SEA	07:00 am →	LAX	09:35 am 0	Economy	
	2 hours 35 minutes; Airbus Industrie A320-100/200; (Sabre) Remove						

Outbound | Return

Los Angeles, CA - Thu, Oct 1

Displaying: 30 out of 36 results. ❓   << Previous 1 2 3 Next >> | All

	Carrier		Depart		Arrive	Stops	Class	Seat Map
○ Starting From: $159.20	Delta #129	LAX	01:00 pm →	SEA	03:47 pm 0		Economy	
	◆◆ 2h 47m; Boeing 717; (Sabre)							
○ Quote for Price	Delta #2764	LAX	01:00 pm →	SFO	02:24 pm 0		Economy	
	Delta #5736	SFO	03:30 pm →	SEA	05:37 pm 0		Economy	
	◆◆ 4h 37m; Boeing 717, Embraer E-175; (Sabre)							
○ Quote for Price	United #1405	LAX	01:00 pm →	DEN	04:19 pm 0		Economy	
	United #1584	DEN	07:42 pm →	SEA	09:33 pm 0		Economy	
	◆◆ 8h 33m; Boeing 787-900, Boeing 737-900; (Sabre)							

When you have selected the flights you want, click the "Price these options" button.

Then Click the green select button. If there are flights with lower prices, the system will provide you with the opportunity to select the less expensive flights before you continue

That will take you to the Review and reserve flight page. Before you check out, you can select your seats or update your frequent flyer information.

Review and Reserve Flight

REVIEW FLIGHTS

Outbound flight: Seattle, WA (SEA) - Los Angeles, CA (LAX) Wed, Sep 30

▲ Delta #2166	Seattle Tacoma Intl Ar... (SEA) Depart: Wednesday, 09:09 am	Los Angeles Intl (LAX) Arrive: Wednesday, 12:00 pm
	Stops: 0 Duration: 2h 51m Economy: V Boeing 717	

Return flight: Los Angeles, CA (LAX) - Seattle, WA (SEA) Thu, Oct 1

▲ Delta #2056	Los Angeles Intl (LAX) Depart: Thursday, 04:25 pm	Seattle Tacoma Intl Ar... (SEA) Arrive: Thursday, 07:07 pm
	Stops: 0 Duration: 2h 42m Economy: V Boeing 737-800 (winglets)	

ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. ❓

Primary Traveler   Edit | Review all

Name: Michael bear   **Phone:** 555-555-5555   [michael_bailar@travelctm.com ▾]

Frequent Flyer Programs Add a Program

For Delta

[No Program selected ▾]

SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats]

You can also update your billinginformation on this page and review the fares and fees.

When you are satisfied with everything on this page, click the "Reserve Flight and Continue" button.

Checking out is covered in a separate section of this guide.

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	$121.86	$37.34	$159.20

Total Estimated Cost : $159.20
Total Due Now: $159.20

SELECT A METHOD OF PAYMENT

How would you like to pay?

Please choose a credit card. ▼ ❓   Add credit card

* Indicates credit card is a company card

⚠ This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

Back   Reserve Flight and Continue

Online Support
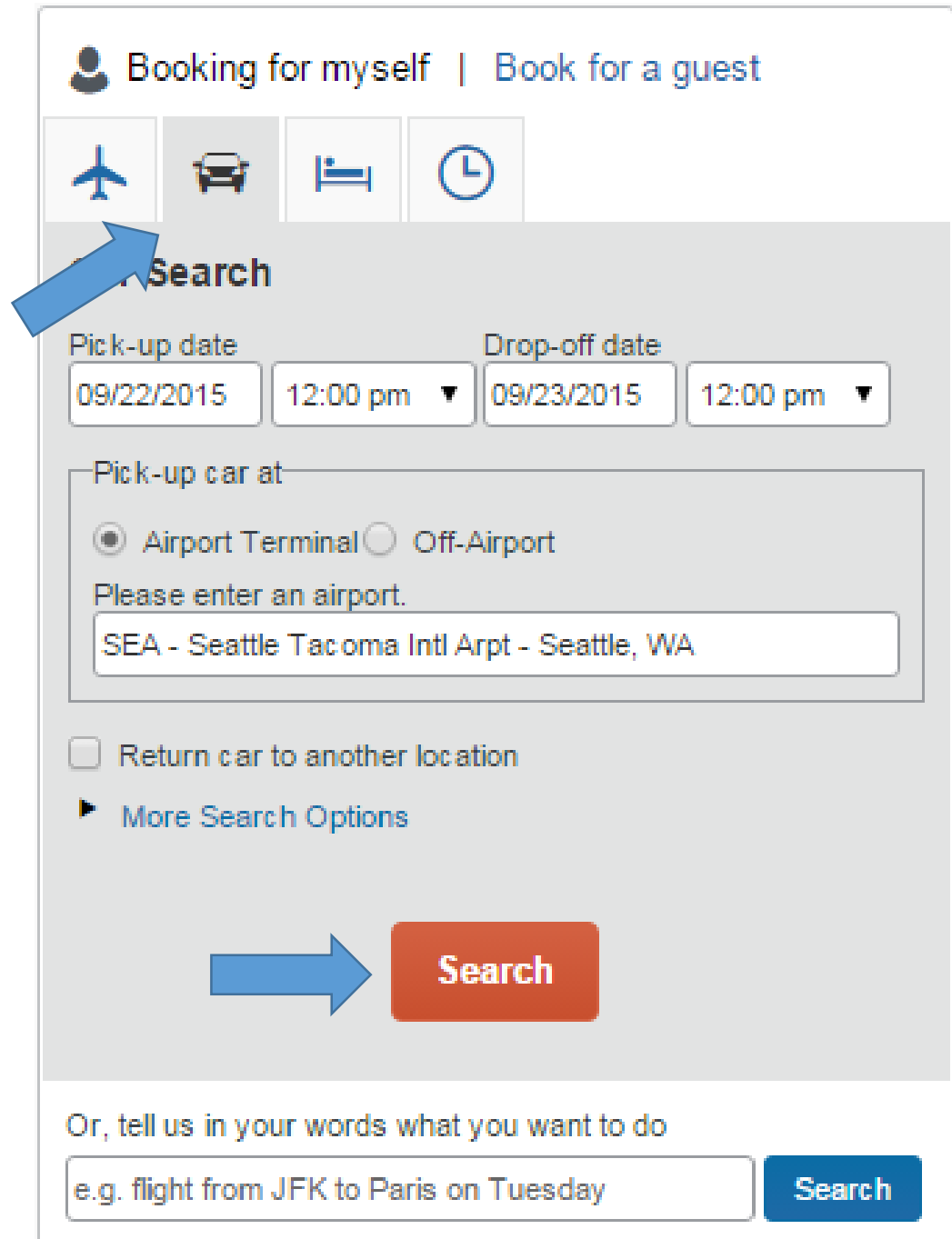
Concur: Search for Car

Search for a Rental Car in Concur

Searching for a flight in the Concur online booking tool is simple. The first thing you will need to do is log in to Concur.

From the home page go to the car search tab and enter your search criteria. To drop the car off at a location that is different from where you picked it up at, click the "Return car to another location" checkbox. For more detailed search options click the "More Search Options" link.

That will take you ti the car selection page. Just click the green select button to select the car you want. To view more details on the rental car you are picking, including fee information, click the "more info" link.

That will take you to the Review and Reserve Car page. Here, you can provide some rental car preferences, add a rental car agency program, and review the price and fee structure.

When you are satisfied with everything on this page, click the "Reserve Car and Continue" button.

Completing the reservation is covered in a different section of this guide.

Review and Reserve Car

REVIEW RENTAL CAR
National Car Rental Location Details

Type	Pick-up	Drop-off
Economy Car	Airport Terminal	Airport Terminal
Features	SEA: Seattle	SEA: Seattle
	12:00 pm Tue, 09/22/2015	12:00 pm Wed, 09/23/2015

PROVIDE RENTAL CAR PREFERENCES
Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

Ex: Need early pick-up (10am)   ☐ Include in-car GPS system ☐ Include ski rack

ENTER DRIVER INFORMATION
Ensure the name below matches the I.D. you have with you on the day of pick-up. ⊙

Driver   Edit | Review all
Name: Michael bear   **Phone:** 555-555-5555   [michael_bailar@travelctm.com ▼]

Rental Car Agency Program Add a Program
[No Program selected ▼]

REVIEW PRICE SUMMARY

Description	Daily Rate	Dates	Total
National Car Rental	$91.27	Sep 22 - Sep 23	$91.27
		Total Estimated Cost : $125.42*	
		Total Due Now: $0.00**	
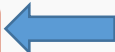
* Does not include additional fees incurred during time of travel.
** Remaining amount due at rental location.

[Back]   [Reserve Car and Continue]

Online Support

Concur: Search for Hotel
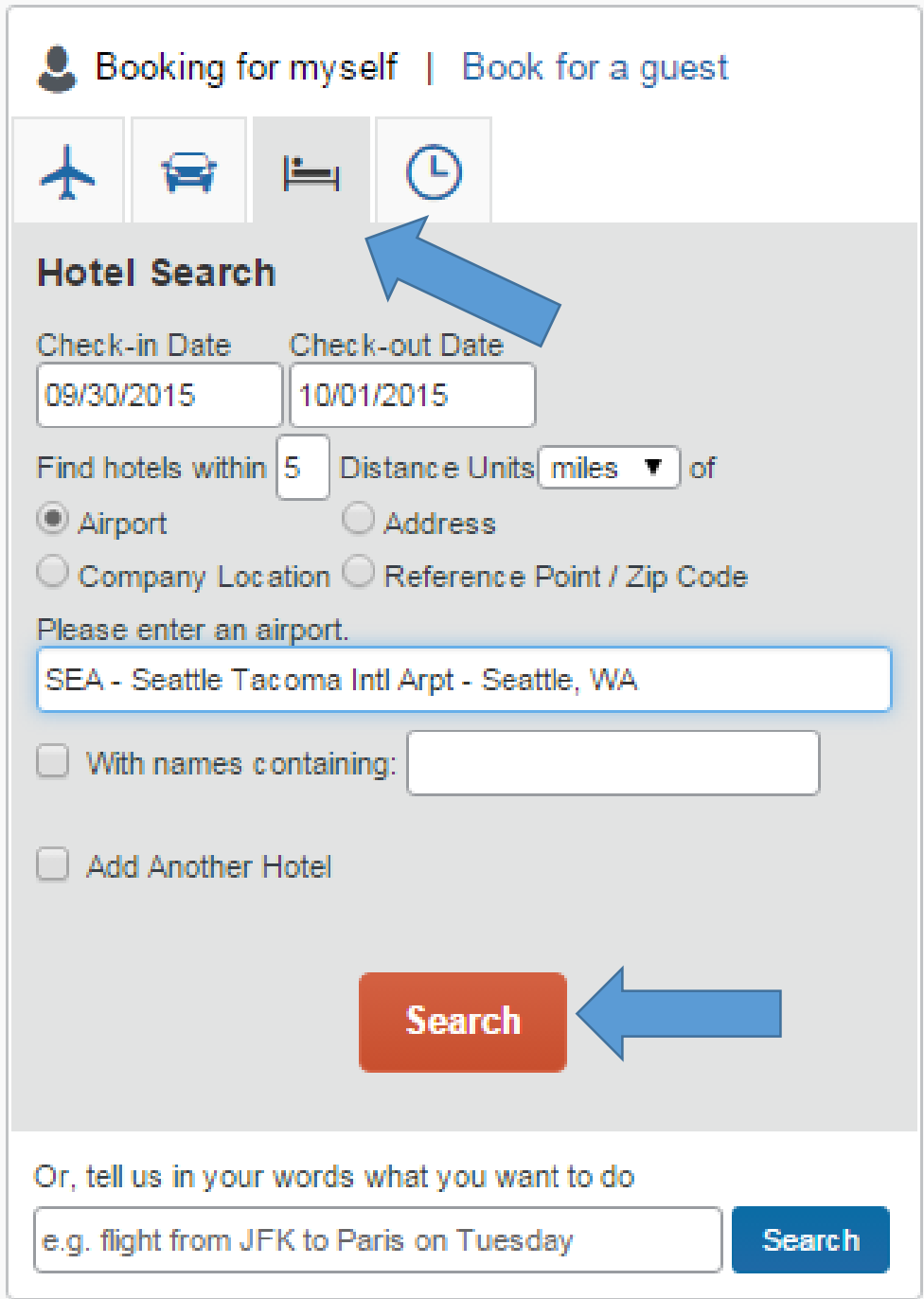
Search for a Hotel in Concur

Searching for a hotel in the Concur online booking tool is simple. The first thing you will need to do is log in to Concur.

To get started go to the hotel tab on the Concur home page and enter your search criteria. The tool has a function to allow you to search for multiple hotels.

That will take you to the hotel selection page. Just pick the hotel you want and click the "Choose Room" link.

Next, click the radial button next to the room rate you want and click the green select button.

That will take you to the review and reserve hotel page. Here you can enter any hotel room preferences, hotel membership numbers, and see detailed room information.

Review and Reserve Hotel

REVIEW HOTEL ROOM

Seattle Airport Marriott

Corporate Rate - Regular Rate, Guest Room, 1 King Or 2 Double

1 Night | 1 Guest*

Check-in	Check-out	Address	Phone
Wednesday, September 30, 2015	Thursday, October 01, 2015	3201 South 176th Street Seattle, Washington 98188 United States of America	1-206-241-2000

* We reserve every hotel room for 1 guest only, regardless of the number of actual travelers sharing the room. The primary traveler's name is attached to the reservation for hotel check-in.

PROVIDE HOTEL ROOM PREFERENCES

Your preferences and comments will be passed to the hotel.

Comments (30 character max)

Ex: Need early check-in (10am)

☐ Request foam pillows ☐ Request rollaway bed ☐ Request crib

ENTER HOTEL GUEST INFORMATION

Ensure the name below matches the I.D. shown on the day of check-in. ❓

Hotel Guest   Edit | Review all

Name: Michael bear   **Phone:** 555-555-5555   michael_bailar@travelctm.com ▼

Hotel Program Add a Program

No Program selected ▼

When you scroll down to the bottom of the page, you can update your credit card information, review rate details, and see the cancellation policy.

When you are satisfied with the information on this page, click the "Reserve Hotel and Continue" button.

Checking out is covered in a separate section of this guide.

REVIEW PRICE SUMMARY

Description	Nightly rate	Dates	Total
Seattle Airport Marriott	$259.00	Sep 30 - Oct 01	$259.00

Total Estimated Cost : $259.00*

Total Due Now: $0.00**

* Does not include taxes or additional fees incurred during time of stay.
** Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Please choose a credit card. ▼ ❔   Add credit card

* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Seattle Airport Marriott   Marriott HOTELS & RESORTS

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

RATE: USD 259.00
TOTAL RATE: 293.12 USD
EXTRA PERSON: $0.00

☐ *I agree to the hotel's rate rules, restrictions, and cancellation policy.

Back   **Reserve Hotel and Continue**

Online Support

Concur: Checking Out

Checking out in Concur

Checking out in the Concur online booking tool is simple. The first thing you will need to do is log in to Concur.

In previous sections, you have seen how to search for flights, rental cars, and hotels. At the end of each search, to checkout, use the "Reserve and Continue" button.

REVIEW PRICE SUMMARY

Description	Nightly rate	Dates	Total
Seattle Airport Marriott	$259.00	Sep 30 - Oct 01	$259.00

Total Estimated Cost : $259.00*

Total Due Now: $0.00**

* Does not include taxes or additional fees incurred during time of stay.
** Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT
The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Please choose a credit card.   ▼   ❓   Add credit card

* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY
Please review the rate details and cancellation policy provided by the hotel.

Seattle Airport Marriott   *Marriott*
                                 HOTELS & RESORTS

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

RATE: USD 259.00

TOTAL RATE: 293.12 USD

EXTRA PERSON: $0.00

☐ *I agree to the hotel's rate rules, restrictions, and cancellation policy.

Back   **Reserve Hotel and Continue**

That will take you to the travel details page. You can see various bits of information on this page. You can also add, change, or cancel segments of your trip from this section.

Travel Details

TRIP OVERVIEW

I want to...
Print Itinerary
E-mail Itinerary

Trip Name: Trip from Seattle to Los Angeles (Edit)
Start Date: December 16, 2015
End Date: December 16, 2015
Created: September 08, 2015, Vernon bear *(Modified: September 08, 2015)*
Description: (No Description Available) (Edit)
Agency Record Locator: ZTFOLC
Passengers: Michael Bear
Total Estimated Cost: $75.10 USD (Details)

> ⓘ Airfare must be ticketed by an agent by: **09/09/2015 10:00 PM Mountain**

Change frequent flyer program

Add to your Itinerary

🚗 Car   🛏 Hotel

📶 Wi-Fi

RESERVATIONS

Wednesday, December 16, 2015

✈ **Flight   Seattle, WA (SEA) to Los Angeles, CA (LAX)**   Change | Cancel all Air

Alaska Airlines 440 📶

Departure: 09:20 AM   **Confirmation: VIOJHN**
Seat: 19A (Confirmed) ✔ **Change Seat**   Status: **Confirmed**
Seattle Tacoma Intl Arpt (SEA)
Duration: 2 hours, 40 minutes
Nonstop

Arrival: 12:00 PM
Los Angeles Intl (LAX)
Terminal: 6

Additional Details
Aircraft: Boeing 737-800   Distance: 956 miles
E-Ticket
Cabin: Economy (R)   Meal: Food for purchase

🚗   🛏
Car   Hotel

At the bottom of the page, you can see the fare rules and cost details. If you are happy with this information, click the next button at the bottom of the page.

TOTAL ESTIMATED COST

Air   View Fare Rules
    Airfare quoted amount: $56.74 USD
    Taxes and fees: $18.36 USD
Total Estimated Cost: $75.10 USD

Restrictions

  Quote: VALID AS/NON-REF/CHNG SUBJ TO FEE

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

REMARKS

  AFTER HOURS EMERGENCY 800-875-7655

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.

Next >>   Cancel

Sometimes the tool will require a little more information. Just fill out all of the required information and click the next button. You can also put a trip on hold from this page.

That will take you to the final page in the checkout process. This just shows you your trip details, fare rules, cost, and fee information. Click the "Purchase Tickets" button to finalize your purchase.

Canceling your reservation will be covered in a separate section of this guide.

Trip Confirmation

To COMPLETE BOOKING, please press the "Purchase Ticket" Button after reviewing this page.
To CANCEL, press the Cancel button.

TRIP OVERVIEW

Trip Name: Trip from Seattle to Los Angeles

Start Date: December 16, 2015

End Date: December 16, 2015

Created: September 08, 2015, Vernon bear *(Modified: September 08, 2015)*

Description: test

Agency Record Locator: ZTFOLC

Your reservation is complete, but not yet ticketed. A final itinerary will be sent in a separate email.

Passengers: Michael Bear

Total Estimated Cost: $75.10 USD

ⓘ   Airfare must be ticketed by an agent by: **09/09/2015 10:00 PM Mountain**

TOTAL ESTIMATED COST

Air		
		View Fare Rules
Airfare quoted amount:		$56.74 USD
Taxes and fees:		$18.36 USD
Total Estimated Cost:		$75.10 USD

Restrictions

Quote:	VALID AS/NON-REF/CHNG SUBJ TO FEE

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

REMARKS

```
**AFTER HOURS EMERGENCY 800-875-7655**
```

Almost done... Please confirm this itinerary.

[Display Trip] [<< Previous] [Purchase Ticket>>] [Cancel]

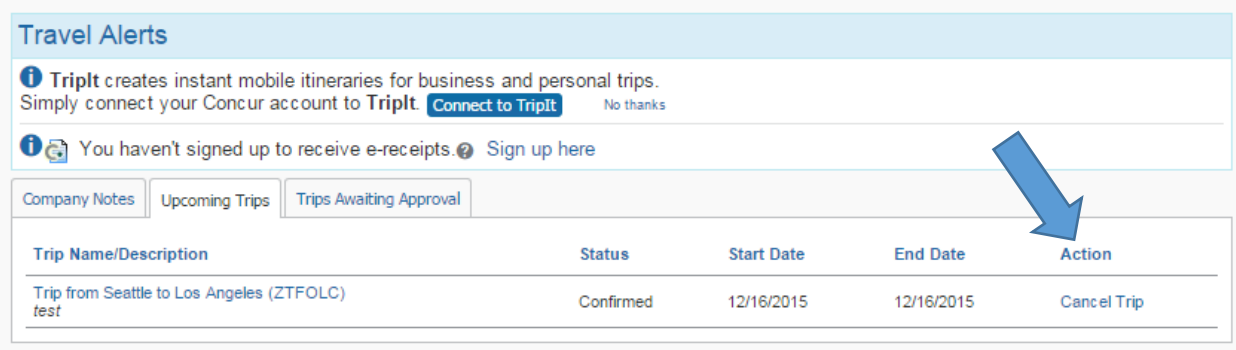# Online Support

Concur: Cancel Trip

Cancelling a Trip in Concur

Cancelling reservation in the Concur online booking tool is simple.

Keep in mind, that cancelling a reservation in Concur typically incurs a fee. Please be completely sure you want to cancel the trip because it cannot be undone.

The first thing you will need to do is log in to Concur.

First, from the concur home page, simply find your list of trips and click the "Cancel Trip" link.
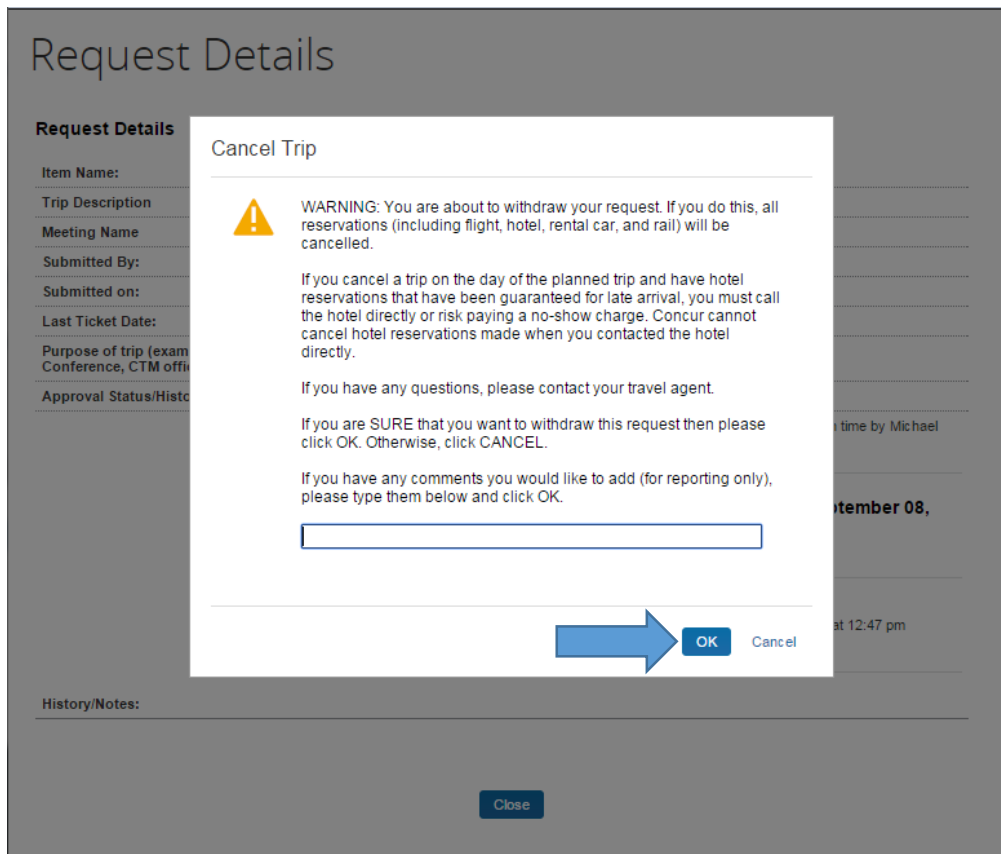
This window will pop up. You can enter any comments you would like added to the reporting for this trip. Click "OK" to continue.

And your trip is cancelled.

To return to the home page, click the "Return to Travel Center" button.

You should receive a cancellation confirmation email from CTM shortly.

Online Support

Concur: Manage Your Profile

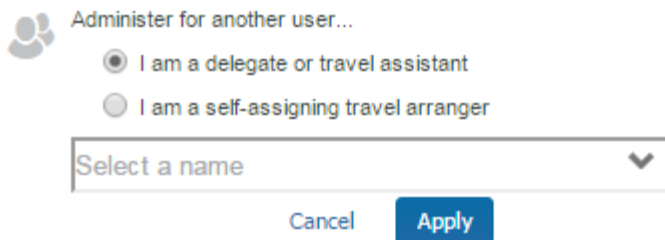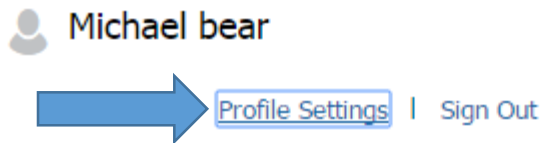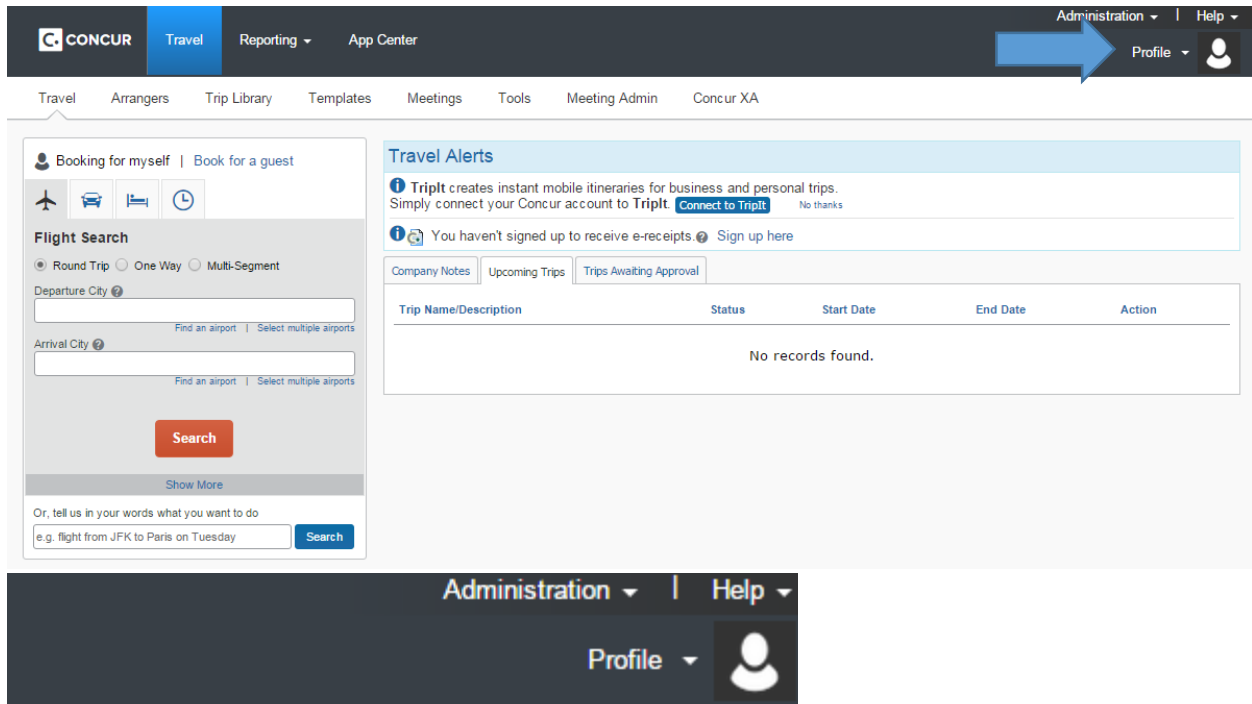# Updating Your Profile in Concur

Updating your profile in the Concur online booking tool is simple.

The first thing you will want to do is login to the Concur online booking tool. From the home page, simply click on the drop-down list in the top right corner and click "Profile Settings".

That will take you to the profile page, simply click on the part of your profile you wish to update. Then fill out any information you would like and click "Save". Be aware that most accounts have required information that must be filled out in order to save your profile or to book travel in with CTM.

Your Information

Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings

Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Other Settings

E-Receipt Activation
System Settings
Connected Apps
Concur Connect
Change Password
Privacy Statement
Travel Vacation
Reassignment
Mobile Registration
I'm Assisting...

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.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Mobile Registration
Set up access to Concur on your mobile device

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

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

Change Password
Change your password.

My Profile - Personal Information

Jump To: [Personal Information ▼] [Choose]
Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.
Fields marked [Required] and [Required**] (validated and required) must be completed to save your profile.

Change Picture

⚠ **Important Note**
Your Name and Airport Security: Please [   ] that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased ai[   ] curity, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name[Required]	Middle Name[Required]	Nickname	Last Name[Required]	Suffix
▼	Vernon			bear	▼
		☑ No Middle Name			

Company Information   Go to top

Manager	Org. Unit/Division	Employee Position/Title
	▼	

Department [Required]
PNW Region

[Save]

Online Support

Concur: Travel Arranger
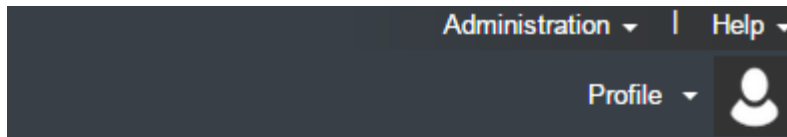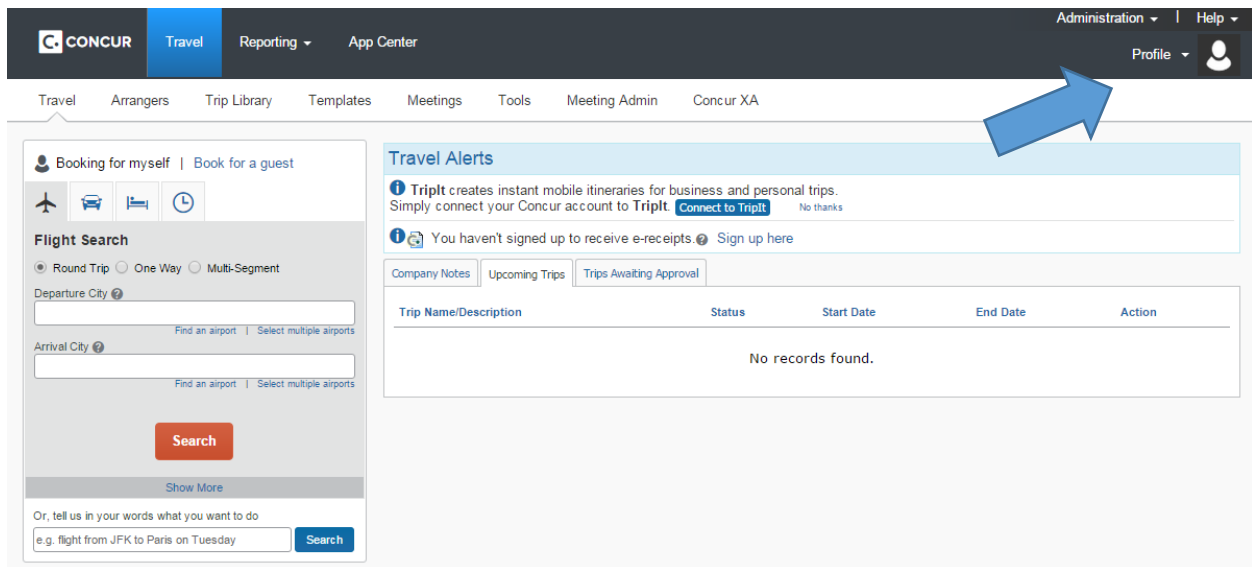
Managing Profiles and Travel in Concur

Managing profiles and booking travel for your travelers in the Concur online booking tool is simple.

If you are managing travel for someone else or you need to update someone's profile, there are a couple steps you need to know. You may only access another user's profile if your company settings allow it. If you are unable to access a profile that you believe you should have access to, contact the Online team and they should be able to help you out.

To access a traveler's profile, start by logging in to the booking tool. From the home page, mouse over the profile drop down in the top right corner of the page. Then enter the name of the traveler and click "Apply".
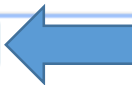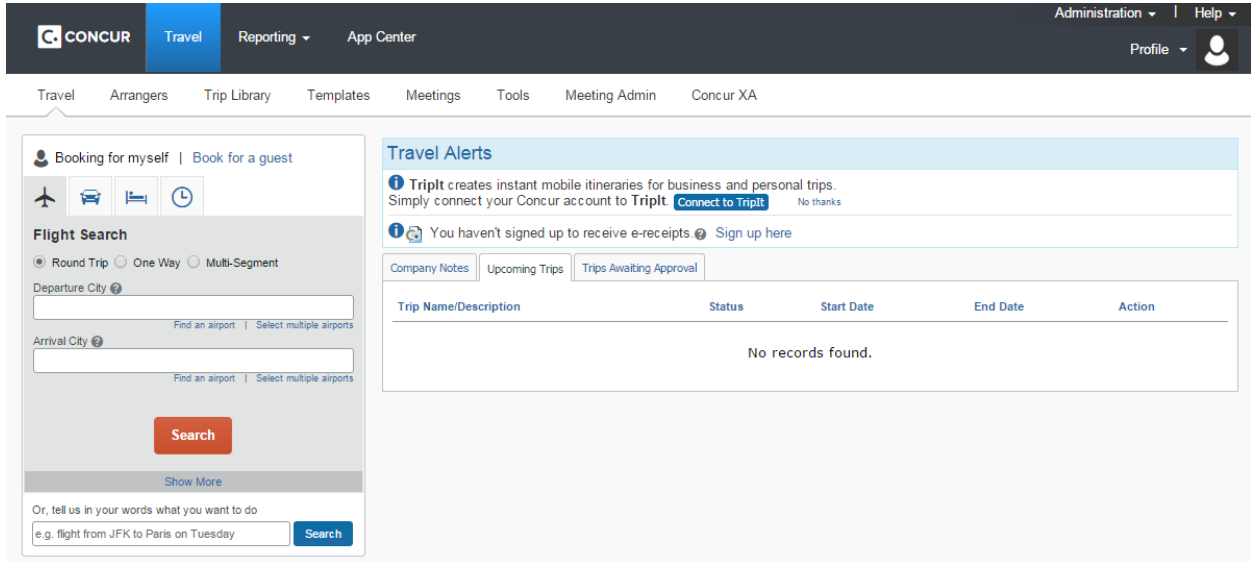
That will take you to the traveler's home page, It will look almost exactly like your home page.

From this page, you can book travel and update the traveler's profile in the same way you would for your own profile. Updating your profile and booking travel are both covered in separate sections of this guide.