

## Section 1: Getting Started

### Step 1: Log on to Concur Travel

- 1 In the User Name field, enter your *user name*.
- 2 In the **Password** field, enter your *password*.

### 3 Click Login.

If you are not sure how to start Concur Travel, check with your company's system administrator.(Ext 7499)

### Section 2: Use My Concur

Step 1: Explore the available options

- 1 Explore the **Trip Search** section.
- 2 Look at the **Weather** section (not available in Concur Standard).
- 3 Explore the **Travel Info** section.
- 4 Locate the Trip List section.
- 5 View the **Trips Awaiting Approval** section. *This section appears only if you are logged on as an approver.*

# Section 3: Update Your Profile

### Step 1: Change your password

- 1 At the top of the My Concur page, click **Profile**.
- 2 On the Other Settings menu on the left side of the page, click Change Password.
  3 In the Old Password field, enter your current password.
- 4 In the **New Password** field, enter your new password. 5 In the **Re-enter New Password** field, enter your new password. In the **Password Hint** field, enter a hint or 6 reminder for instances when you have forgotten your password. 7 Click Submit. Step 2: Change your time zone, date format, or language At the top of the My Concur page, click 1 Profile. 2 On the **Other Settings** menu on the left side of the page, click System Settings. 3 On the **System Settings** page, update the appropriate information, and then click Save. Step 3: Update your personal information 1 At the top of the My Concur page, click Profile. 2 Click **Personal Information** in the middle of the page. 3 On the **Personal Information** page, update the appropriate information, and then click Save. Step 4: Set up a Travel Arranger or Assistant At the top of the My Concur page, click 1 Profile. 2 Select Personal Information. 3 Scroll down to the Assistants and Travel Arrangers section. 4 Click Add an Assistant located to the right

## **Concur Travel Quick Reference Guide**

|    | -  |
|----|--|
|    | of the section.  |
| 5  | In the <b>Search Criteria</b> field, type the last name of the person you wish to add as an assistant/travel arranger. |
| 6  | Click Search.  |
| 7  | From the <b>Assistant</b> dropdown menu, select the appropriate assistant.   |
| 8  | Select Can Book Travel for Me.   |
| 9  | Select <b>Is my primary assistant for travel</b> , if necessary.   |
| 10 | Click Save.  |

| Section 4: Make a Travel Reservation |   |  |
|--------------------------------------|---|--|
| Step 1: Make a flight reservation    |   |  |
| 1                                    | On the Flight tab, select one of these:   |  |
|                                      | Round Trip  |  |
|                                      | One Way   |  |
|                                      | Multi-Segment   |  |
| 2                                    | In the <b>Departure City</b> and <b>Arrival City</b> fields, enter the cities for your travel.                    |  |
| 3                                    | In the <b>Departure</b> and <b>Return</b> fields, select the appropriate dates and times.                         |  |
| 4                                    | If you need a car, select <b>Pick-up/Drop-off</b> car at airport.   |  |
| 5                                    | If you need a hotel, select <b>Find a Hotel</b> .<br>(More information appears; make the<br>appropriate choices.) |  |
| 6                                    | Select Refundable Only, if appropriate.   |  |
| 7                                    | In the Search Flights By field, select either Price or Schedule.  |  |

Concur Technologies, Inc.



| 8  | Click Search.  |  |
|--|--|--|
| 9  | Select desired flights.  |  |
| 10   | Review selected flights from the Review<br>and Reserve Flight page. Also confirm seat<br>assignments by clicking the <b>Select Seat</b><br>button.         |  |
| 11   | Click any blue (unoccupied) seat (move the<br>mouse pointer over a seat to see the<br>number). Click <b>Select Seat</b> , and then click<br><b>Close</b> . |  |
| 12   | Click Reserve.   |  |
| Ste  | p 2: Select a car  |  |
| 1  | If you specified that you need a car on the <b>Flight</b> tab, you will see car results for the car search.  |  |
| 2  | Select the appropriate rental car, and then click <b>Reserve Flight and Continue</b> .   |  |
| Step 3: Select a hotel   |  |  |
| If you selected the <b>Find a Hotel</b> option on the <b>Flight</b> tab, the hotel results are displayed after you choose your rental car. |  |  |
| 1  | Use the filter options to narrow your search by <b>Amenity</b> , <b>Neighborhood</b> , or <b>Chain</b> .   |  |
| 2  | Click <b>Show Details</b> for a specific hotel to view more detailed information.  |  |
| 3  | A rate range appears. Click <b>choose room</b> to view rates and details about the room.   |  |
| 4  | When ready to reserve your room, click the   |  |
| 4  | radio button to the left of the rate, and then click <b>Reserve.</b>   |  |

| Step 4: Complete the Booking |   |  |
|------------------------------|---|--|
| 1                            | Enter your trip information in the <b>Trip</b><br><b>Name</b> and <b>Trip Description</b> fields. |  |
| 2                            | Click Next to finalize your reservation.  |  |
| 3                            | To complete the booking, click <b>Purchase</b><br><b>Ticket</b> .                                 |  |

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

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 or date of the flight. Your change options will be with the same airline and routing.

Contact your travel agency, the appropriate Website, or vendor directly if you did not book your trip using Concur Travel.

- 1 At the top of the My Concur page, click **Travel**.
- 2 In the **Upcoming Trips** section of My Concur, click the name of the trip.
- 3 Click Change Trip.

## **Concur Travel Quick Reference Guide**

- 4 On the itinerary, click the appropriate link to:
  - 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
- 5 To cancel your entire trip, in the **Upcoming Trips** section of My Concur, click the name of the trip.
- 6 Click Cancel Trip, and then click OK.