

Concur Travel QuickStart Guide



SAP Concur
Technologies
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| 11/30/2016 | Updated proprietary statement | 1.4 | Concur |
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Invoice

Expense

Travel

Request

Risk Messaging

SAP Concur for Mobile

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Updating Your Travel Profile

Before you use Concur Travel for the first time, you need to update your Travel profile. Even if you don't make any changes, you must **save** your profile before you can book a trip in Concur Travel.

Notes:

- Some companies have custom fields on this page. Check with your agency or Travel administrator if you need information about your custom profile fields.
- Depending on your company's configuration, some of these options might not be available to you. For more information, check with your SAP Concur administrator.
- Depending on your company's configuration, this area in Profile may appear even if your company does not use Concur Travel.

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

- Assistant or travel arranger
- Credit card
- Email options
- E-Receipts
- Language
- Password
- Personal preferences (name, address, emergency contact, credit card)
- Regional preferences (number format, date format, language)
- Register for SAP Concur for Mobile
- Travel preferences (air, hotel, car rental, rail preferences)
- Travel vacation reassignment and other preferences and settings (default home page, calendar, emails, accessibility mode)

Travel Arranger

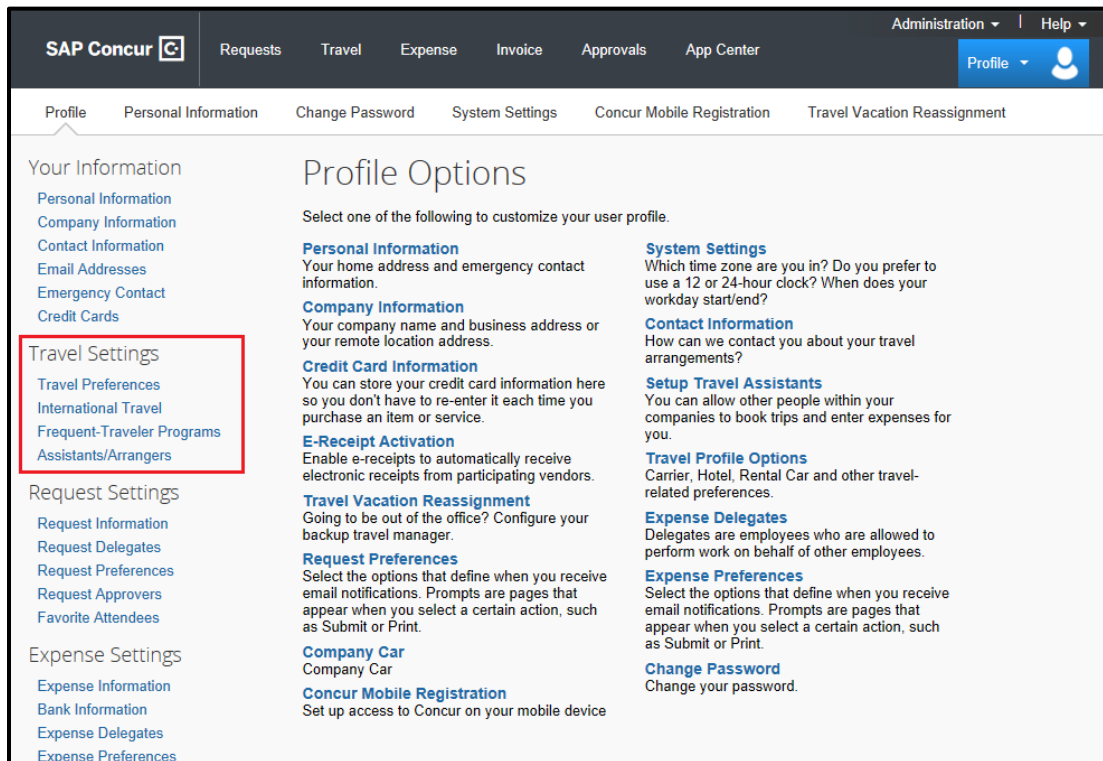
To administer travel for another user

1. If you are a travel arranger and you want to change the profile of one of your users, click **Profile**.
2. In the **Administer for another user** field, type the first few letters of the user's name.
3. Select the appropriate user from the search results, and then click **Start Session**.

Access




To access your Concur Travel profile information

1. Click **Profile > Profile Settings**.
2. On the **Profile Options** page, select the appropriate **Travel Settings** links on the left side of the page.



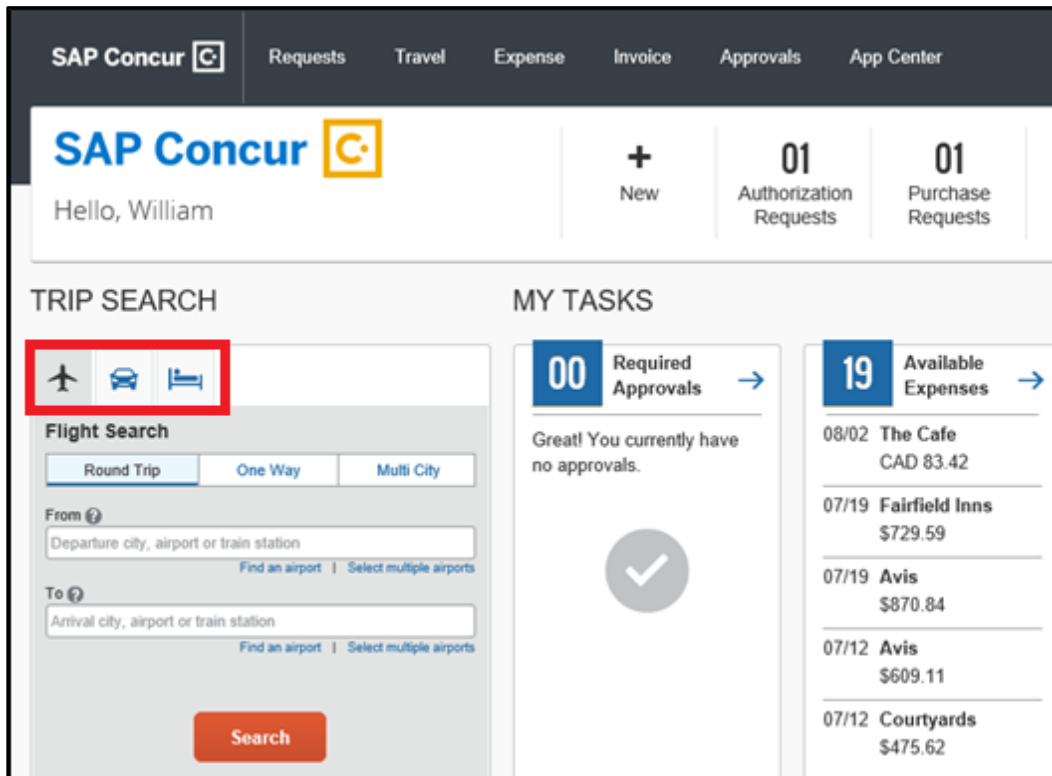
The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and tabs for Requests, Travel, Expense, Invoice, Approvals, and App Center. On the right, there are links for Administration and Help, and a Profile dropdown menu. Below the navigation bar, there is a sub-navigation bar with links for Profile, Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and contains a list of settings categories on the left and detailed descriptions of each category on the right. The 'Travel Settings' category is highlighted with a red box. The categories listed on the left are: 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), Request Settings (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), and Expense Settings (Expense Information, Bank Information, Expense Delegates, Expense Preferences). The categories listed on the right are: Personal Information, Company Information, Credit Card Information, E-Receipt Activation, Travel Vacation Reassignment, Request Preferences, Company Car, Concur Mobile Registration, System Settings, Contact Information, Setup Travel Assistants, Travel Profile Options, Expense Delegates, Expense Preferences, and Change Password.

Booking a Flight

From the SAP 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.


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

- From the SAP Concur home page, click **Travel** on the menu.
- Click the SAP Concur logo from the left side of the menu.



Step 1: Start the Search

1. Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi City
2. In the **From** and **To** fields, enter the departure and arrival cities for your travel.
When you enter a city, airport name, or airport code, SAP Concur will automatically search for a match.
Note: Use the **Find an airport** and **Select multiple airports** links as needed.
3. Click in the **Depart** 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.

- 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, and if necessary, to see/reserve nonstop flights.

Notes:


- The graphical display is based on flight schedule data. It will not show any rail options, and it cannot take refundability or class of service preferences into account.
 - 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.
- If you need a car, click the **Pick-up / Drop-off car at airport** check box.



Pick-up/Drop-off car at airport
 Find a Hotel

- Depending on your company's configuration, you might be able to automatically reserve a car, allowing you to bypass viewing the car search results. When you select this option, additional fields appear. Select a vendor and car type; the car is automatically added to your reservation.
 - 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.
- If you need a hotel, click the **Find a Hotel** check box.
 - Depending on your company's configuration, you might be able to specify an airline. If so, the **Specify airline** check box appears.
Note: You can only search for one vendor at a time, and this will override the preferred airline searches normally done for all of the frequent flyer number carriers. If you click the **Specify airline** check box, a list of carriers appears that are color coded:
 - The first (yellow) are the frequent flyer carriers.
 - The second (gray/khaki) are the most requested airlines.
 - The remaining airlines are in alphabetical order.
 - Depending on your company's configuration, you might be able to book a reservation for a companion. If so, select from the **Number of adults** list.
Note: If a companion is selected, the payment screen provides the option to use the credit card from the companion's profile.
 - Depending on your company's configuration, you might be able to select the appropriate **Class** of service.
 - From the **Search by** dropdown list, select either **Price** or **Schedule**. (Depending on your company's configuration, you might not have these options, or you might have an additional option: **Multi-Fare**.)
 - To search only for refundable flights, click the **Refundable only air fares** check box.

12. If necessary, uncheck the **Flight w/ no double connections** check box.
13. Click **Search**.



Flight Search

Round Trip | One Way | Multi City

From ?
Seattle, WA - Seattle-Tacoma Intl Airport
[Find an airport](#) | [Select multiple airports](#)

To ?
MEM - Memphis Airport - Memphis, TN
[Find an airport](#) | [Select multiple airports](#)

Depart ?
05/07/2018 | depart | Morning | ± 3

Return ?
05/11/2018 | arrive | Afternoon | ± 3

Pick-up/Drop-off car at airport
 Find a Hotel

Class ? | **Search by**
Highest allowed | Schedule

Refundable only air fares
 Flights w/ no double connections





Search

Step 2: Select a flight

1. On the **Select Flights** page:
 - a. If you selected **Price** on the previous page, the **Shop by Fares** tab is initially active. Click either the **Shop by Fares** or **Shop by Schedule** tab for the appropriate flight information.
 - b. Select the fare button for the flights that you want to purchase.

SEATTLE, WA TO MEMPHIS, TN Show as USD
 MON, MAY 7 - FRI, MAY 11



[Hide matrix](#) [Print / Email](#)

| | | | | |
|----------------------|--|--|---|--|
| All 77 results |  American Airlines |  Delta |  United |  Alaska Airlines |
| 1 stop 77 results | 652.10 54 results | 655.10 10 results | 655.10 12 results | 1,790.10 1 results |

Shop by Fares Shop by Schedule

Flight Number Search Sorted By: Price - Low to High

Displaying: 77 out of 77 results.
[Previous](#) | Page: 1 of 8 | [Next](#) | [All](#)

| | | | |
|---|---|---------|---|
|  | 11:11a SEA → 11:25p MEM 1 stop CLT American Airlines 707, 1825 | 10h 14m | \$652.10 |
|  | 12:50p MEM → 07:28p SEA 1 stop CLT American Airlines 896, 443 | 8h 38m | |



[Show all details](#)

- c. If you selected **Schedule** on the previous page, the **Depart** tab is initially active. Select the fare button for the flights that you want to purchase from the **Depart** and **Return** tabs.

Depart Return

Seattle, WA - Mon, May 7

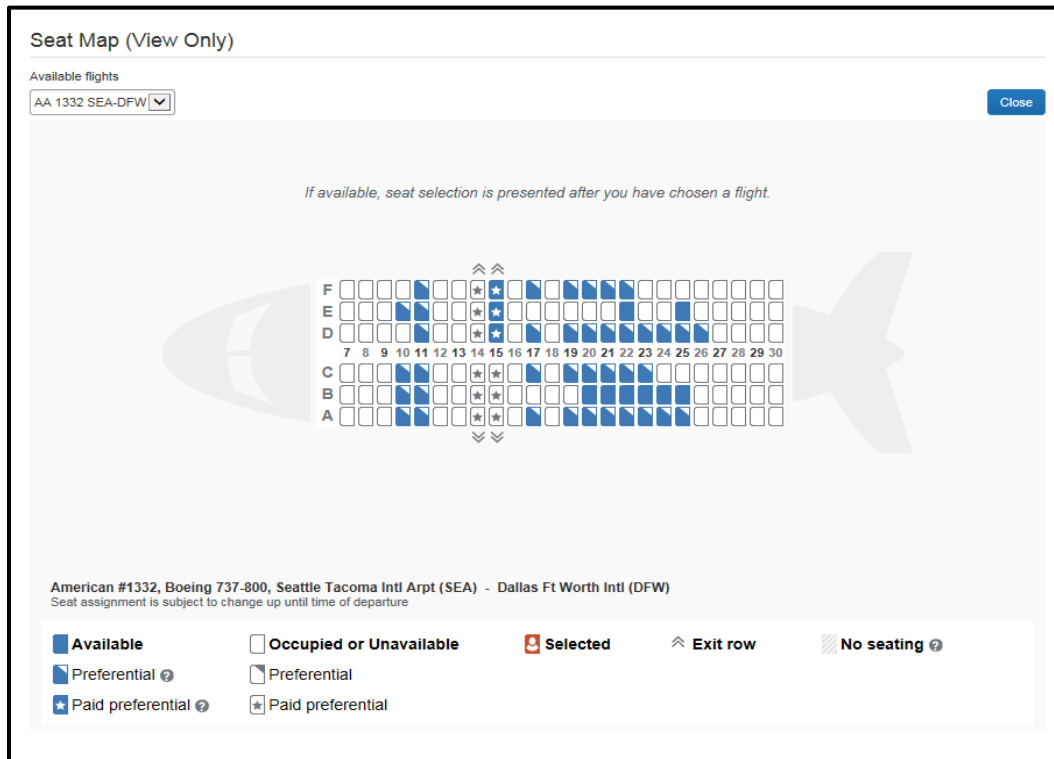
Flight Number Search Sorted By: Depart - Earliest Displaying: 60 out of 60 results.
[Previous](#) 1 2 3 4 5 6 [Next](#) | [All](#)

| | | | |
|---|--|---------|---|
|  | 06:00a SEA → 01:12p DTW Nonstop Delta | Economy | Select |
|  | 02:05p DTW → 03:06p MEM Nonstop Delta | Economy | |

7h 6m / Delta 1444, Delta 3377 - [View seats](#)
 Boeing 737-900, Canadair Regional Jet 900 (Worldspan)

2. Click the **Hide Matrix** link to view additional information on the screen.
3. Review the flight details for your trip.

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







Seat Map (View Only)

Available flights
AA 1332 SEA-DFW Close

If available, seat selection is presented after you have chosen a flight.

American #1332, Boeing 737-800, Seattle Tacoma Intl Arprt (SEA) - Dallas Ft Worth Intl (DFW)
Seat assignment is subject to change up until time of departure

Available Occupied or Unavailable Selected Exit row No seating 

Preferred  Preferred Paid preferred  Paid preferred 

4. On the **Review and Reserve Flight** page you can:
 - Review the flight details
 - Enter traveler information
 - Select frequent flyer programs
 - Select your seat assignment
 - Review the price summary
 - Select your method of payment
5. Click **Reserve Flight and Continue**.

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.

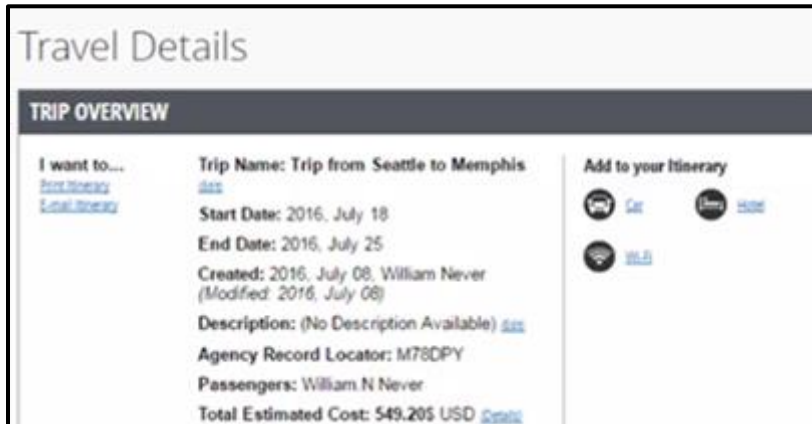
Step 4: Select a hotel

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 your itinerary as appropriate.
 - c. In the **Add to your Itinerary** section, add a car, hotel, Wi-Fi, etc., as needed.



The screenshot shows the 'Travel Details' page with a 'TRIP OVERVIEW' section. It includes fields for 'I want to...' (Print Itinerary, Email Itinerary), 'Trip Name: Trip from Seattle to Memphis', 'Start Date: 2016, July 18', 'End Date: 2016, July 25', 'Created: 2016, July 08, William Never (Modified: 2016, July 08)', 'Description: (No Description Available)', 'Agency Record Locator: M78DPY', 'Passengers: William N Never', and 'Total Estimated Cost: 549,205 USD'. There is also an 'Add to your Itinerary' section with icons for Car, Hotel, and Wi-Fi.

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

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.

Note: Changing a flight can result in fare changes. If this option is available to you, please make sure to check with your travel agency on fare differences.

- d. If you want to cancel your flight, click **Cancel all Air**.

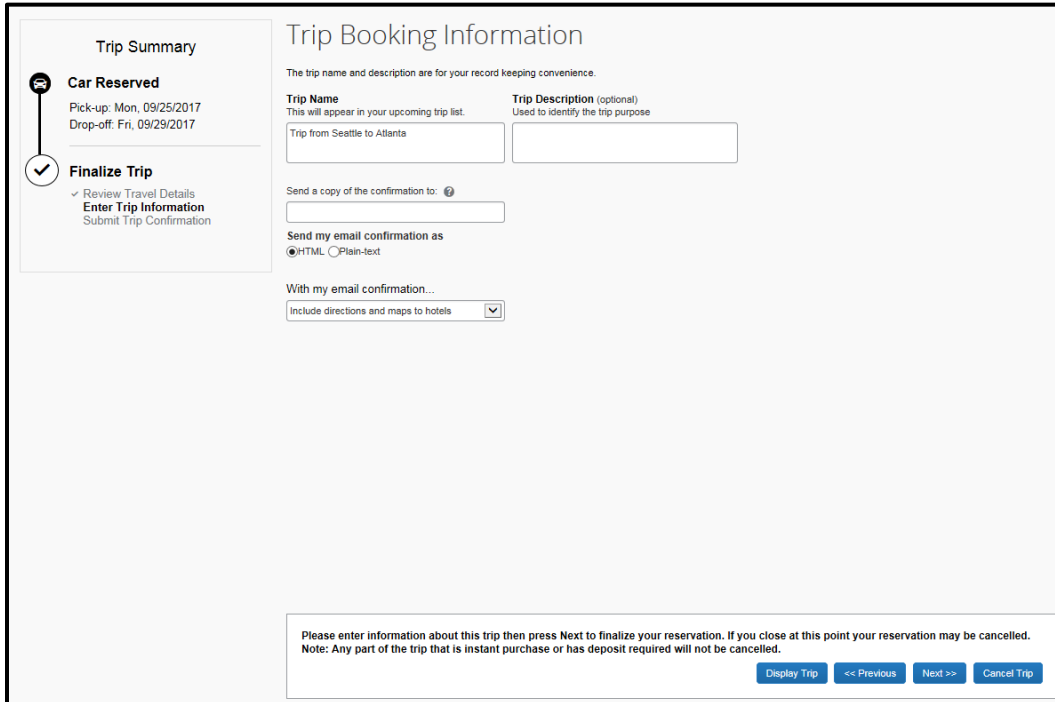


The screenshot shows the 'RESERVATIONS' page for Monday, September 25, 2017. It displays a flight from Seattle, WA (SEA) to Dallas, TX (DFW) on American Airlines 1332. The departure is at 06:05 AM and the arrival is at 12:04 PM. The flight is confirmed, but a seat was not successfully reserved. There is a 'Select Seat' link and a 'Cancel all Air' button.

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

Step 6: Review the booking information

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



Trip Summary

Car Reserved
Pick-up: Mon, 09/25/2017
Drop-off: Fri, 09/29/2017

Finalize Trip
✓ Review Travel Details
Enter Trip Information
Submit Trip Confirmation

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name
This will appear in your upcoming trip list.
Trip from Seattle to Atlanta

Trip Description (optional)
Used to identify the trip purpose

Send a copy of the confirmation to:

Send my email confirmation as
 HTML Plain-text

With my email confirmation...
Include directions and maps to hotels

Please enter information about this trip then press Next to finalize your reservation. 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.

Display Trip << Previous Next >> Cancel Trip

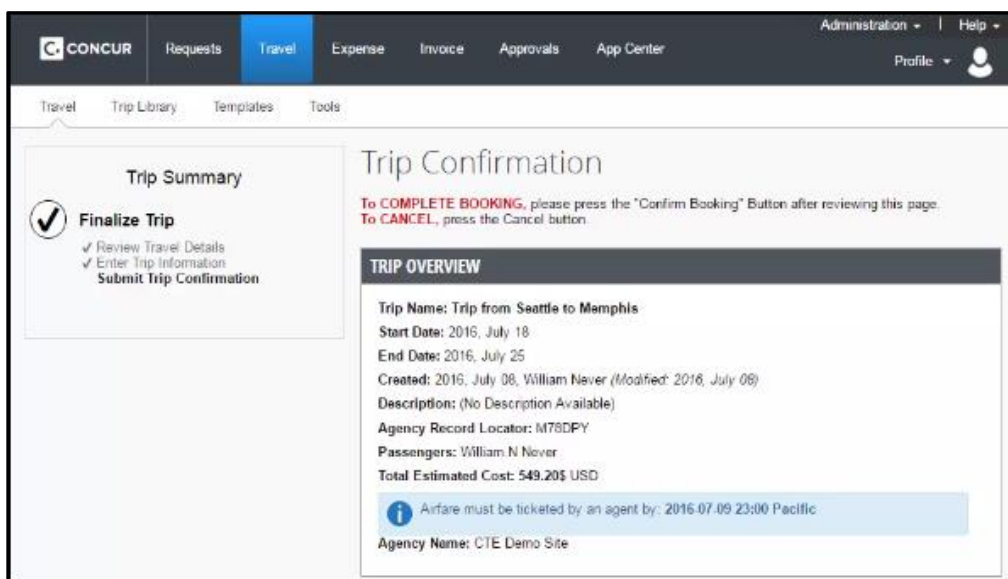
2. Enter or modify your **Trip Name**. This is how the trip will appear on your itinerary and in the automated email from SAP Concur.
3. Enter a **Trip Description** (optional).
4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.
 - If you book the trip, you will automatically receive the email.
 - If you book as an arranger, you will also receive the email.
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 SAP Concur.
7. Depending on your company's configuration, your company may require billing information. If so, make sure to complete this information if requested.

Note: Your company might offer its travelers the option to hold a trip. Travel will always display the length of time this trip can be held on this page. **Pay close attention to the date and time displayed; if the trip is not submitted, approved, and ticketed by the date and time displayed, in most cases it will be automatically cancelled.**

8. Click **Next**.

SAP Concur displays your itinerary on the **Trip Confirmation** page. This itinerary will include any messages about ticketing policies.



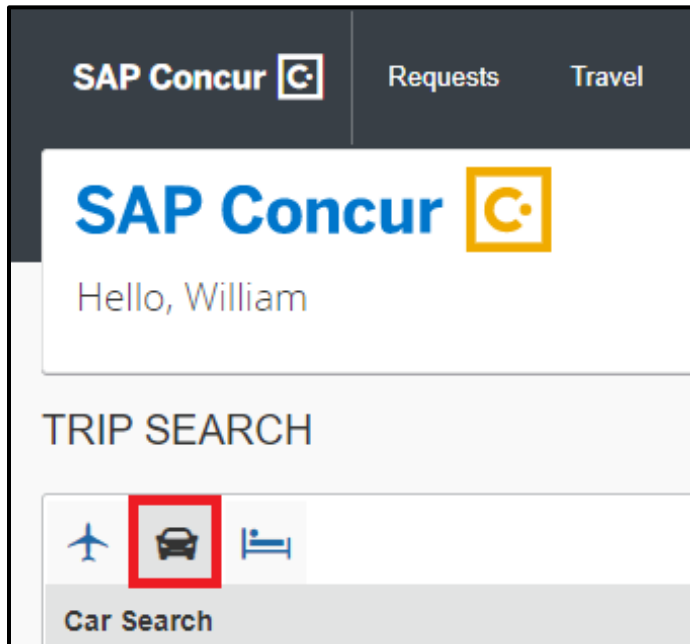
Step 7: Purchase the ticket

1. Click **Confirm Booking** to send your request to your manager for approval and the travel agent. Depending on your company's configuration, the **Pre-populating Your Expense Report** page appears. You can add transportation expenses for your trip to and from the airport.
2. Click **Finish**.
The **Finished!** screen shows your confirmation number and information to contact the travel agent.
3. Click **Return to Travel Center**.

Booking a Car

Step 1: Use the Car tab

1. If you require a car *but not airfare*, click the Car  tab.



2. Enter your **Pick-up** and **Drop-off** dates and times.
3. 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 might be able to have a car delivered to or picked up from your company location).
4. Select the **Return car to another location** checkbox if needed.
Additional fields appear. Choose the appropriate location.
5. To see additional search preferences, click **More Search Options**.
 - a. Select the **Car Type**.
 - b. Select smoking or non-smoking.
 - c. Select the preferred vendors.
6. Click **Search**.

Step 2: Filter the results (as needed)

There are two sets of filters: a matrix at the top of the page that you can show or hide, and one on the left side of the page.



Trip Summary

PICK UP: (MEM) ON MON, MAY 7 12:00 PM
RETURN: TUE, MAY 8 12:00 PM

Show as USD

Select a Car
Pick-up: Mon, 05/07/2018
Drop-off: Tue, 05/08/2018

Finalize Trip

Use my default credit card: 'Corporate Card'

Change Car Search

Car Display Filters

- Unlimited miles
- Air conditioning
- Hybrid
- Car Transmission**
- Automatic
- Manual

Hide matrix [Print / Email](#)

| All | Economy Car | Compact Car | Intermediate Car | Standard Car | Full-size Car | Premium Car | Lu |
|-------------------|-------------|-------------|------------------|--------------|---------------|-------------|----|
| 36 results | | | | | | | |
| AVIS | | | | | | | |
| Most Preferred | 80.00 | 80.00 | 90.00 | 95.00 | 99.00 | 87.00 | |
| Alamo | 44.36 | 44.36 | 45.36 | 43.80 | 44.75 | 46.65 | |
| Enterprise | 69.36 | 69.36 | 70.36 | 73.34 | 85.22 | 84.30 | |
| Hertz | 78.75 | 78.75 | 88.79 | 93.81 | 97.82 | 83.10 | |
| National | 80.00 | 80.00 | -- | -- | -- | 84.31 | |

Sorted By: Policy - Most Compliant

Displaying: 36 out of 36 results. Previous 1 2 3 4 Next | All

AVIS **Compact Car - \$80.00 per day**
(Worldspan)
Automatic transmission
Unlimited miles, Pick-up: Terminal: MEM
Adults: 2, Children: 2, Large bags: 1, Small bags: 2

Total cost*
\$106.88

7. Select your filter options from the matrix, and from the **Car Display Filters** section on the left.
8. Select the fare button for the car you want to rent.
9. In the **Review and Reserve** section, select the appropriate options.
 - a. **Provide Rental Car Preferences:** Enter any necessary information in the **Comments** field, and select any additional preferences that you want.
 - b. **Enter Driver Information:** To add a Rental car Agency Program, click the **Add a Program** link.
 - c. **Select a Method of Payment:** If you set up a credit card as the default in your profile, the credit card appears. Select the credit card you want to use from the dropdown list. To add a credit card, click the **Add a credit card** link.
10. If you want to change your search, in the **Change Car Search** area:
 - a. Change your pick-up and drop-off dates and times, and your pick-up and drop-off locations.
 - b. Expand **More Search Options** to select the car type and vendors that you prefer.
 - c. Click **Search**.
Travel displays the new results.
11. In the **Travel Details** section:
 - a. Click the appropriate links to print or e-mail your itinerary, and follow the prompts.
 - b. Click **Change** or **Cancel** if needed, and then follow the prompts to change your reservation.
12. Click **Next**.

13. Click **Reserve Car and Continue**.
14. On the **Trip Booking Information** page:
 - a. Enter or modify your **Trip Name**.

This is how the trip will appear on your itinerary and in the automated email from SAP Concur.
 - b. Enter a **Trip Description** (optional).
 - c. Indicate if there is anyone else who should receive the initial confirmation email.

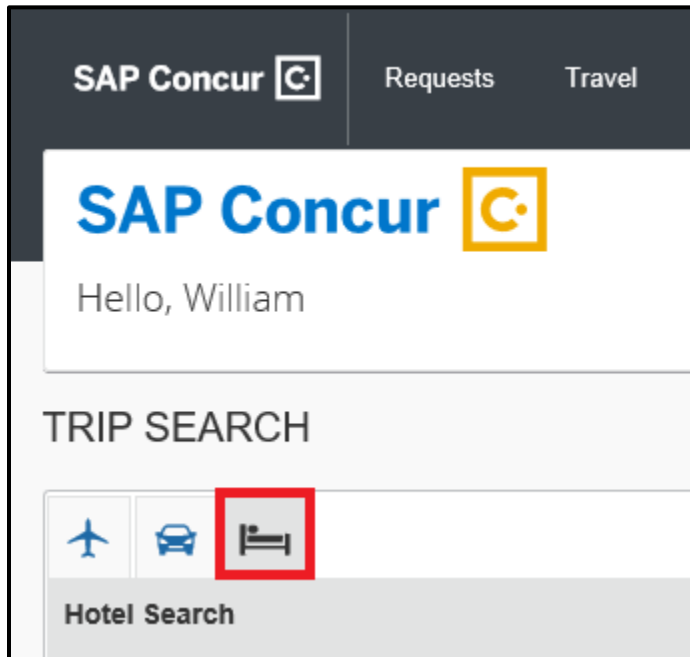
Enter as many recipients as needed, separated by commas.
15. Click **Next**,
16. On the **Trip Confirmation** page, review your trip details, and then click **Confirm Booking**.

If your trip is not compliant with your company's travel policy, a **Travel Rule Triggered** window appears. Select the reason for selecting this car, and then explain why.
17. Click **Save**.

Booking a Hotel

Step 1: Use the Hotel tab

1. If you require a hotel *but not airfare*, click the Hotel  tab.





2. Enter the **Check-in** and **Check-out Dates** (or click each field and use the calendar).
3. Enter the search radius.

SAP Concur will always show *company preferred hotels* within a larger radius, usually 30 miles or kilometers.
4. Choose to search near an airport, an address, company location, or near a reference point / zip code (a city or neighborhood).
5. Enter the reference point or zip code.
 - a. If you know the name of the hotel you want to stay at, check the **With name containing** check box and then enter the appropriate information.
 - b. 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.
 - c. Change your information as necessary.
6. Click **Search**.

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

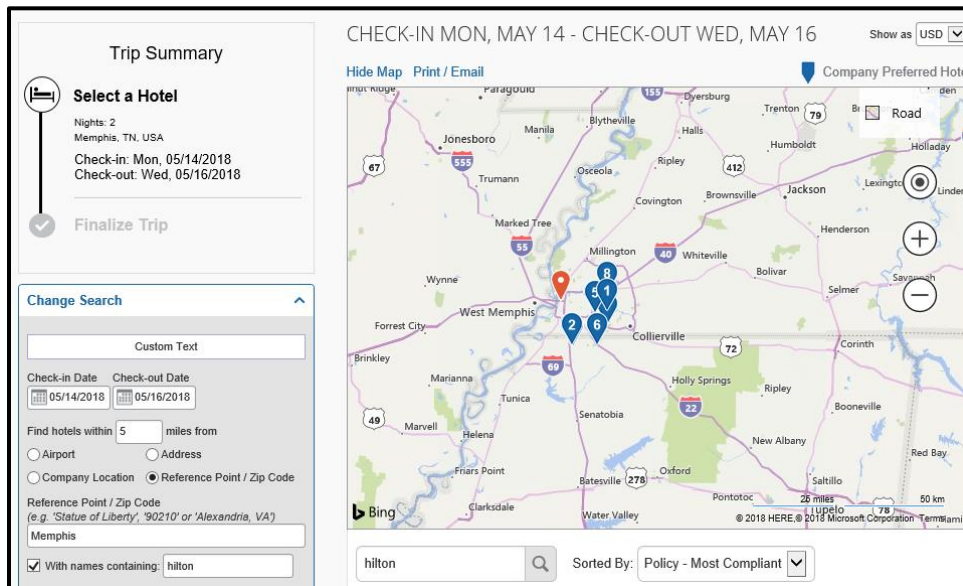
There is a filter set on the left side of the page. Use show  and hide  arrows, as needed.

1. In the **Change search** area:
 - a. Change your check-in and check-out dates; change your hotel location.
 - b. Click **Search**. Travel displays the new results.
2. Use the slider in the **Price** area to narrow your search.
3. In the **Display Settings** area, select the appropriate check boxes.
4. In the **Hotel chain** area, select the appropriate hotels.
5. In the **Hotel Amenities** area, select the appropriate options.

Step 3: Review the hotel map (as needed)

1. Review the hotel map.

The red icon shows your reference point.
2. Click any blue "balloon" to see specific hotel information.
3. Use your mouse to zoom and move the map, as needed.



The screenshot displays the SAP Concur hotel search interface. On the left, there is a 'Trip Summary' section with a 'Select a Hotel' button and a 'Finalize Trip' button. Below this is the 'Change Search' section, which includes fields for 'Check-in Date' (05/14/2018) and 'Check-out Date' (05/16/2018), a 'Find hotels within' slider set to 5 miles, and radio buttons for 'Airport', 'Company Location', and 'Reference Point / Zip Code'. The 'Reference Point / Zip Code' is set to 'Memphis'. There is also a checkbox for 'With names containing: hilton'. The main area is a map showing the Memphis region with several blue balloons representing hotel results. A red pin indicates the reference point. The map includes a search bar with 'hilton' entered and a 'Sorted By' dropdown menu set to 'Policy - Most Compliant'. The top right of the map area shows 'CHECK-IN MON, MAY 14 - CHECK-OUT WED, MAY 16' and 'Show as USD'.

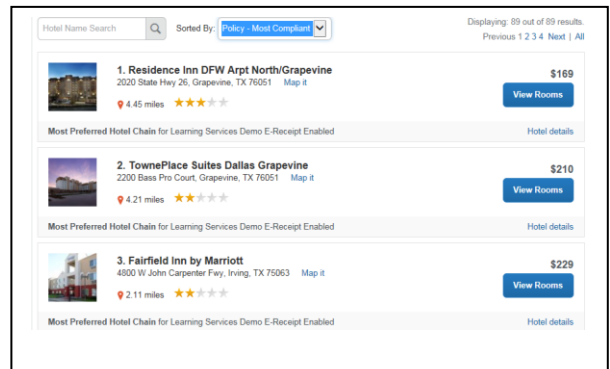
Step 4: Sort the search results (as needed)

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

Step 5: Review the results

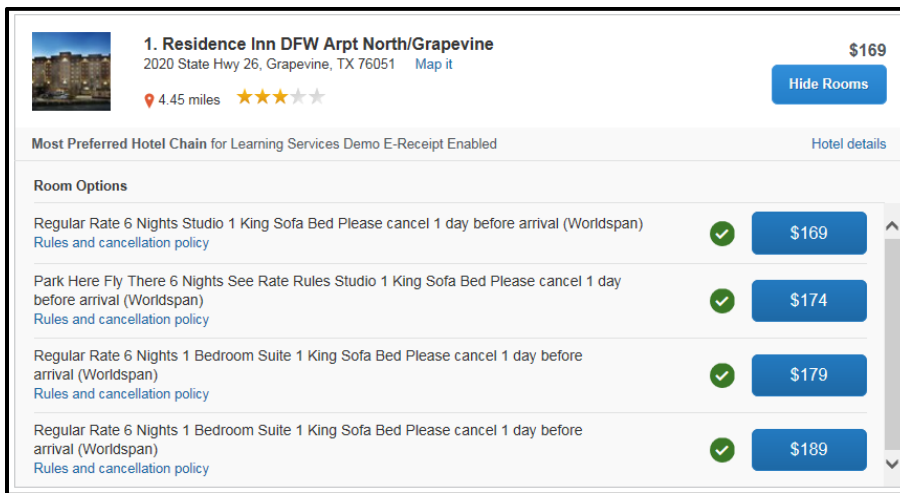
A picture as well as the name, address, rating stars, and price range appears.

1. Click the hotel picture to see more images.
2. Click **Hotel details** to see contact information, street address, cancellation policy, and information about the facility.
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

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



2. 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.
3. Select the **I agree to the hotel's rate rules, restrictions, and cancellation policy** check box.
4. Click **Reserve Hotel and Continue**.
5. Your **Travel Details** page (itinerary) displays.

Creating an Expense Report Based on a Completed Trip

If you use SAP Concur Expense, from the **Upcoming Trips** tab, you can create an expense report based on a trip.

To create an expense report based on a completed trip:

1. On the **SAP Concur** home page, on the Quick Task Bar, click the **New** task, and then click **Start a Report**.

- OR -

On the menu, click **Expense > Manage Expenses** (on the sub-menu). Under **Active Reports**, click the **Create New Report** tile.

2. On the **Create New Report** page, complete all required fields (indicated with a red asterisk) and the optional field as directed by your company.

The fields that appear on this page are defined by your company. Some products might go directly to the expense reporting page.

3. In the **Claim Travel Allowance** section, selection the appropriate option.
4. Click **Create Report**.

The expense report page appears. At this point you can add your out-of-pocket expenses and your company card transactions.

After you the report is created, note the following:

- On the **Travel** page, on the **Upcoming Trips** tab, the **Expense Trip** link appears when the actual expense is incurred.
- For hotel and car segments, the expense is actually incurred at check-out or when the car is returned, so the **Expense Trip** link will not appear until the trip is completed (the last date of the trip).
- For an air expense, the **Expense Trip** link appears depending on your company's configuration.
 - If the Expense configuration allows air to be expensed when it is paid for (generally well in advance of the actual trip), then the **Expense Trip** link appears once the air has been ticketed.
 - If the Expense configuration does not allow for pre-trip air reimbursement, then the **Expense Trip** link appears after the trip is completed (the last date of the trip).

| Trip Name/Description | Status | Start Date | End Date | Action |
|--|--------------------------------|------------|------------|--------------|
| Trip from Seattle to Memphis (2XZSBA) (33AK) | Needs Expense Report Withdrawn | 2020-04-09 | 2020-04-13 | Expense Trip |
| Car Reservation at MEMPHIS (MYD&LF) | Needs Expense Report Withdrawn | 2020-04-09 | 2020-04-12 | Expense Trip |
| Hotel Reservation at MEMPHIS, TN, USA (2YHAXX) | Needs Expense Report Withdrawn | 2020-04-09 | 2020-04-11 | Expense Trip |
| Car Reservation at SEATTLE (NNQFSF) | Needs Expense Report Withdrawn | 2020-05-25 | 2020-05-29 | Expense Trip |
| Car Reservation at SEATTLE (OBNGX9) | Needs Expense Report Withdrawn | 2020-05-25 | 2020-05-29 | Expense Trip |