

## Concur Travel QuickStart Guide



SAP Concur  
Technologies  
Version 1.9

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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.

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

- Personal Information (name, home address)
- Contact Information
- Email Addresses
- Emergency Contact
- Credit cards
- Travel preferences (air, hotel, car rental, rail preferences)
- Frequent-Traveler Programs
- Assistants/Arrangers

## Travel Arranger

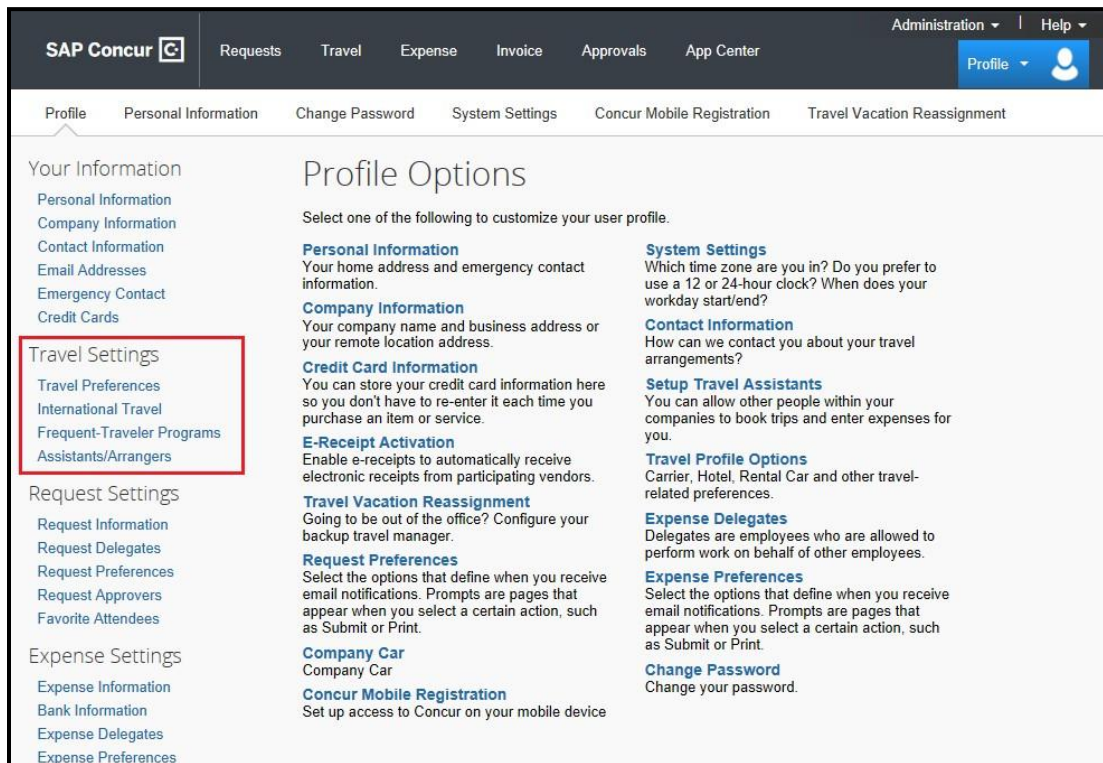
To administer travel for another user

1. If you are a travel arranger and you want to change the profile of one of your users, click Profile.
2. In the Acting 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.



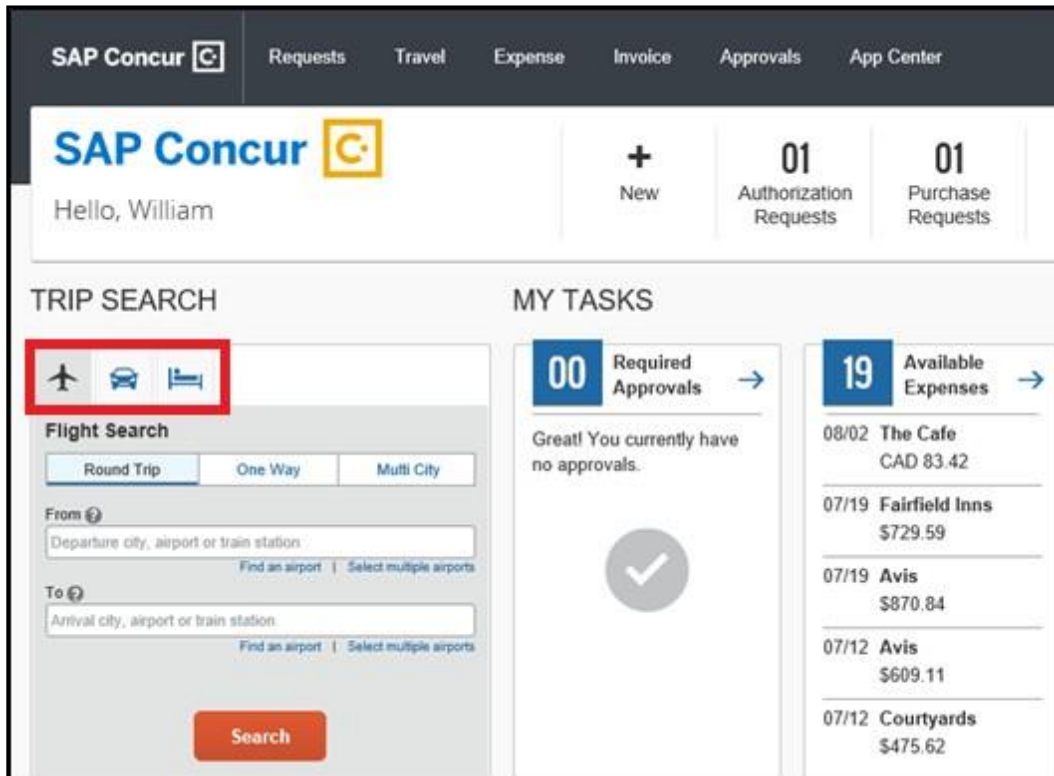
The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Invoice, Approvals, and App Center. A user profile dropdown is visible in the top right corner. Below the navigation bar, the 'Profile' section is active, showing a sub-menu with options like Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and includes a list of settings on the left and detailed descriptions on the right. The 'Travel Settings' category is highlighted with a red box, containing links for Travel Preferences, International Travel, Frequent-Traveler Programs, and Assistants/Arrangers. The right side of the page lists various settings such as Personal Information, System Settings, Contact Information, Setup Travel Assistants, Travel Profile Options, Expense Delegates, Expense Preferences, and Change Password, each with a brief description.

## Booking a Flight

From the SAP Concur home page or the Travel 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


- 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.
  - Select the Specify a carrier check box if you want to select a specific carrier.  
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 carrier 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.
  - From the Search by dropdown list, select either Price or Schedule.
  - To search only for refundable flights, click the Refundable only air fares check box.


10. Click Search.











### Mixed Flight/Train Search

Round Trip | One Way | Multi City

From   
Dallas, TX - Dallas Area Airports  
[Find an airport](#) | [Select multiple airports](#)


To   
MCO - Orlando Intl Airport - Orlando, FL  
[Find an airport](#) | [Select multiple airports](#)


Depart   
 depart  Morning  ± 2 

Return   
 depart  Afternoon  ± 2 

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

---

Search by  
 

Specify a carrier   
 Refundable only air fares





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	<span style="background-color: #0070C0; color: white; padding: 5px 10px; border-radius: 3px;">\$652.10</span>
	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](#)

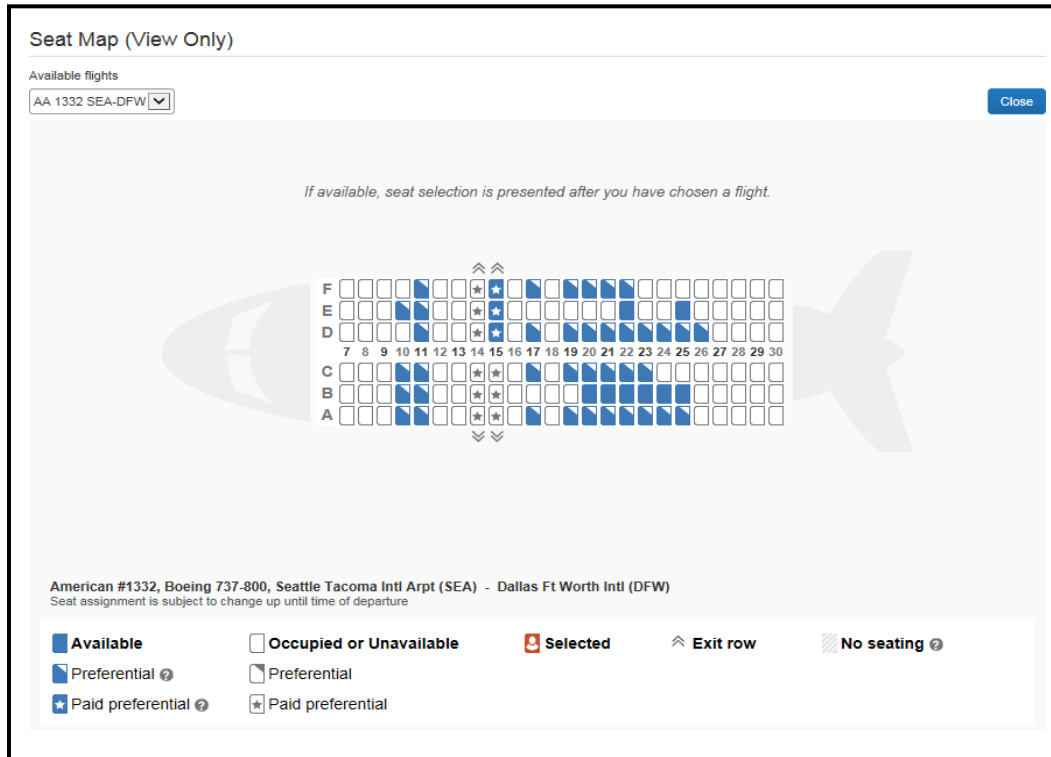
	06:00a SEA → 01:12p DTW Nonstop Delta	Economy	<span style="background-color: #0070C0; color: white; padding: 5px 10px; border-radius: 3px;">Select</span>
	02:05p DTW → 03:06p MEM Nonstop Delta	Economy	

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.



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.

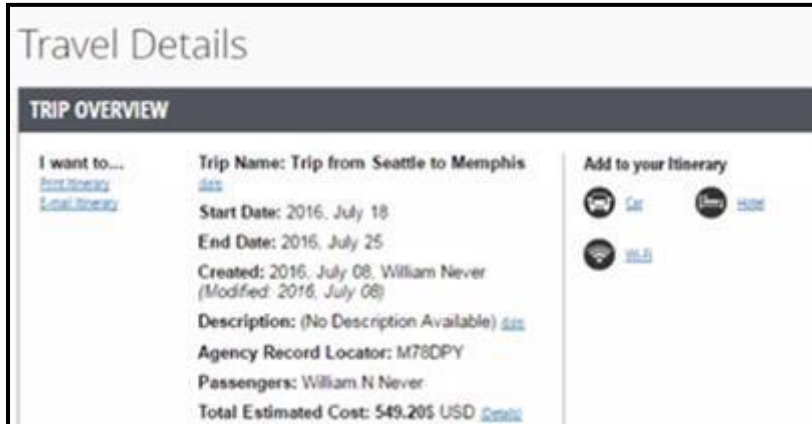
### Step 4: Select a hotel

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...', '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: M78CPY', 'Passengers: William N Never', and 'Total Estimated Cost: 549,295 USD'. There are also links for 'Print Itinerary' and 'Email Itinerary'.

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. If you wish to change or cancel your flight from the itinerary page, 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.

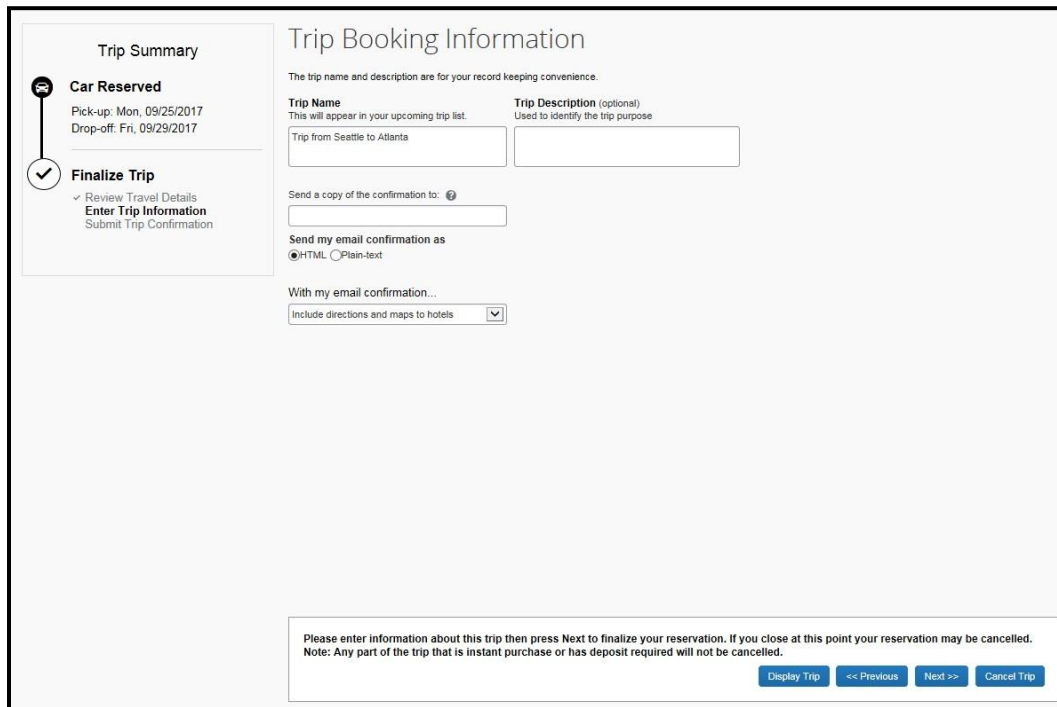


The screenshot shows the 'RESERVATIONS' page for Monday, September 25, 2017. It displays a flight from Seattle, WA (SEA) to Dallas, TX (DFW) on American Airlines 1332. The departure is at 06:05 AM and the arrival is at 12:04 PM. The confirmation code is SDSZRH and the status is Confirmed. A 'Cancel all Air' button is visible in the top right corner. A message states: 'Your flight is confirmed but a seat was not successfully reserved. Status: Confirmed'. There is a link to 'Select Seat'.

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

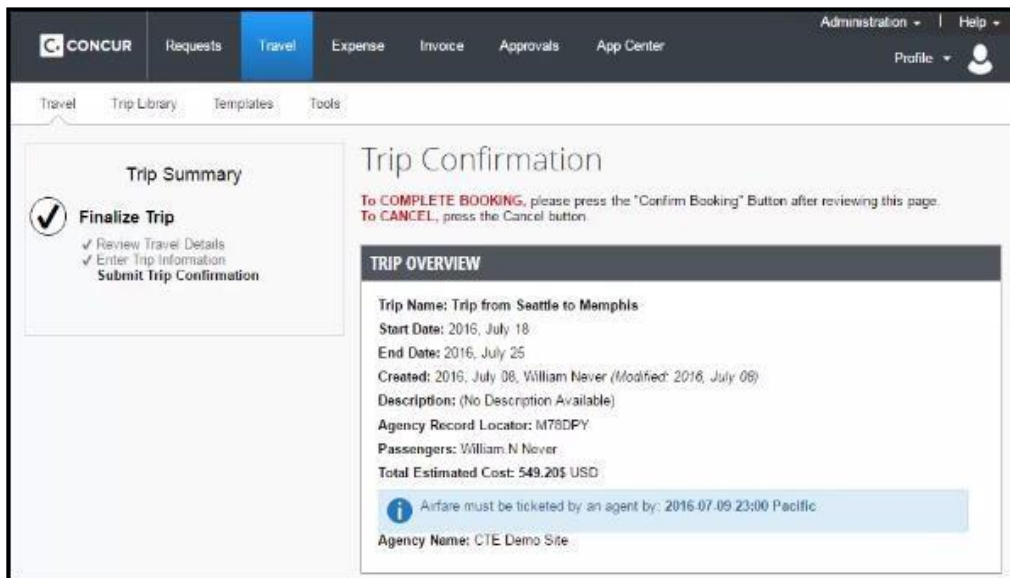
2. Enter or modify your Trip Name. This is how the trip will appear on your itinerary and in the automated email from SAPConcur.
3. Enter a Trip Description (optional).
4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated 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 SAPConcur.

Note: You have 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.

7. Click Next.

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




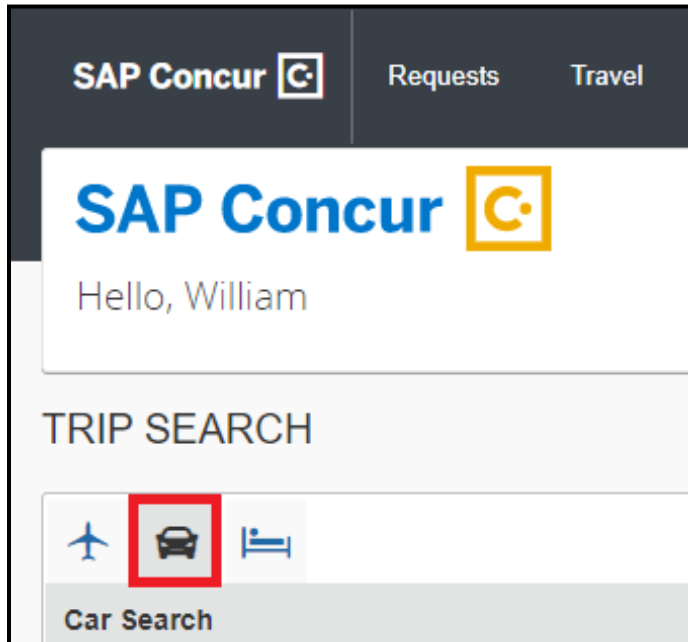
## Step 7: Purchase the ticket

1. Click Confirm Booking to send your request to your manager for approval and the travel agent
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
<b>AVIS</b> 36 results Most Preferred	80.00	80.00	90.00	95.00	99.00	87.00	
<b>budget</b>	44.36	44.36	45.36	43.80	44.75	46.65	
<b>enterprise</b>	69.36	69.36	70.36	73.34	85.22	84.30	
<b>Hertz</b>	78.75	78.75	88.79	93.81	97.82	83.10	
<b>National</b>	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**

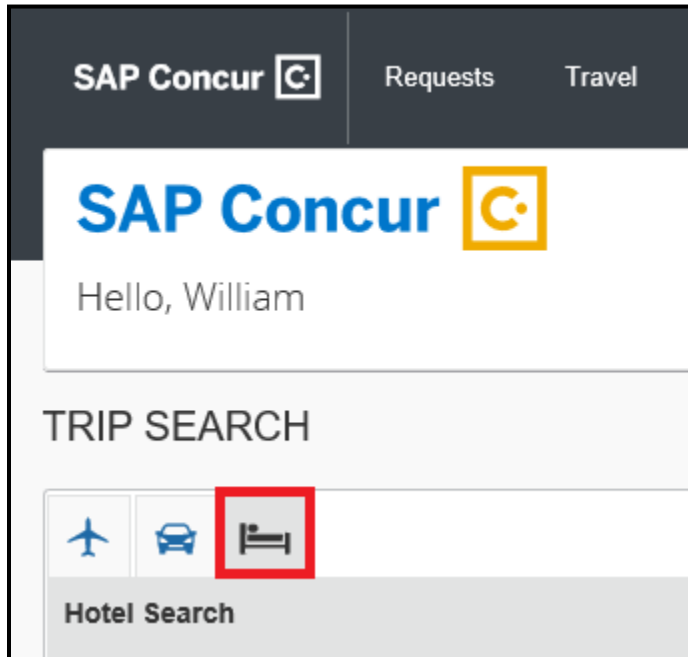
7. Select your filter options from the matrix, and from the Car Display Filters section on the left.
8. Select the fare button for the car you want to rent.
9. In the Review and Reserve section, select the appropriate options.
  - a. Provide Rental Car Preferences: Enter any necessary information in 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 outbound or return flight.
12. Click Next.

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

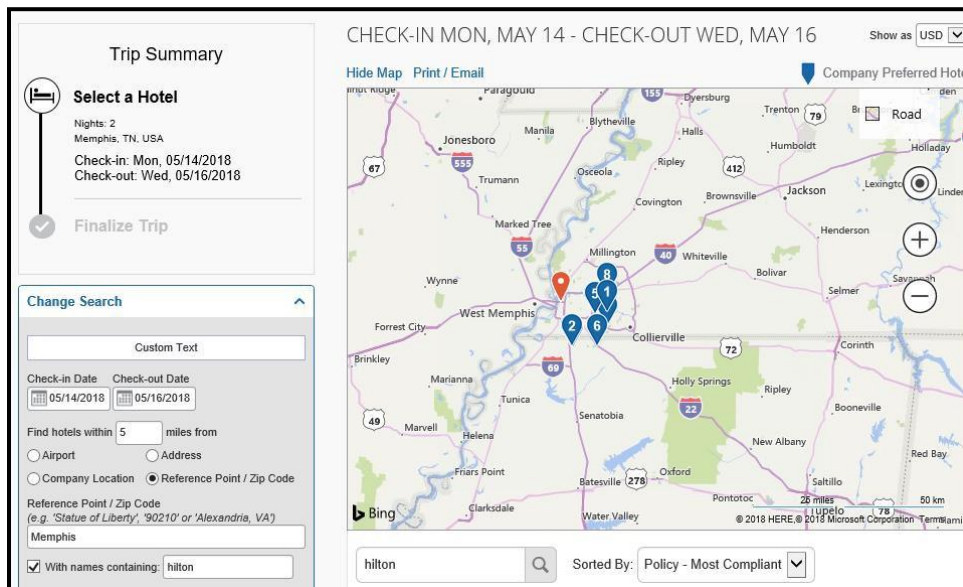
There is a filter set on the left side of the page. Use show  and hide  arrows, as needed.

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 a 'Change Search' section with a 'Custom Text' field, 'Check-in Date' (05/14/2018) and 'Check-out Date' (05/16/2018) fields, a 'Find hotels within' slider set to 5 miles, and radio buttons for 'Airport', 'Address', 'Company Location', and 'Reference Point / Zip Code'. The 'Reference Point / Zip Code' field contains 'Memphis'. At the bottom of the search filters, there is a checkbox for 'With names containing: hilton' which is checked.

The main area shows a map of the Memphis, TN area. The map title is 'CHECK-IN MON, MAY 14 - CHECK-OUT WED, MAY 16' and 'Show as USD'. The map includes a 'Company Preferred Hotel' icon, a 'Road' icon, and a 'Bing' logo. The map shows several blue balloons representing hotel results, with a red balloon indicating the reference point. The search results are sorted by 'Policy - Most Compliant'.

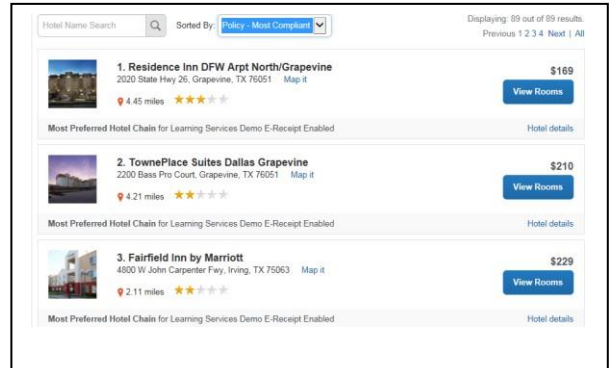
## Step 4: Sort the search results (as needed)

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

## Step 5: Review the results

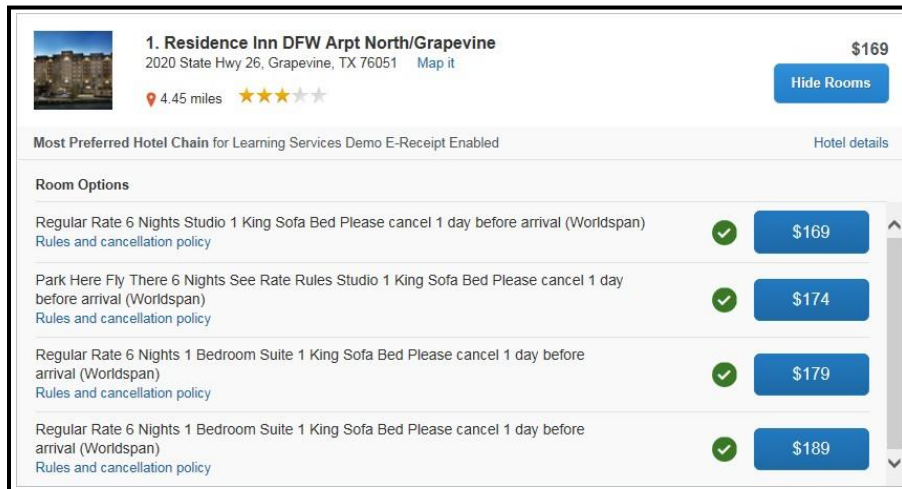
A picture as well as the name, address, rating stars, and price range appears.

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.

