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CONCUR TRAVEL BOOKING GENERAL USER GUIDE

DTU
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CONCUR TRAVEL BOOKING GENERAL USER GUIDE

CONTENT

This guide is a resource for all employees authorized to book professional travel and lodging through the Concur desktop and mobile application.

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DESKTOP APPLICATION

CREATE PERSONAL PROFILE

Prior to booking travel, a personal profile must be completed. Refer to Figure 1 and complete the following steps:

1. From the Travel home page, click on the Profile tab in the upper right-hand corner of the screen.
2. Select Profile Settings in the drop down.
3. On the Profile Options page, select Personal Information.
4. Fill in all required information and save

a. Full Name
b. Region
c. Work and Home Phone
d. E-Mail Addresses
E. TSA Information

IMPORTANT:

Be certain that the first, middle, and last names shown on the personal profile are identical to those on the photo I.D. presented at airport security.

Credit card information, frequent traveler programs, and air/hotel/car preferences can also be provided on this page. Additionally, this is where permissions to grant access to assistants to book travel for others can be changed.

Figure 1. My Profile - Personal Information Page.

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DESKTOP APPLICATION

ACTIVATE E-RECEIPTS

If E-Receipts have not been activated because this is the first trip booked in Concur, follow the 2 steps below. Activating the E-Receipts allows the receipts to flow directly to the expense report feature of Concur.

1. From the My Profile – Personal Information page, select E-Receipt Activation under Other Settings in the left navigation panel (see Figure 2).

Figure 2. Activate E-Receipts – Step 1.

2. Read and follow the activation instructions on the E-Receipt Activation page by clicking here (see Figure 3).
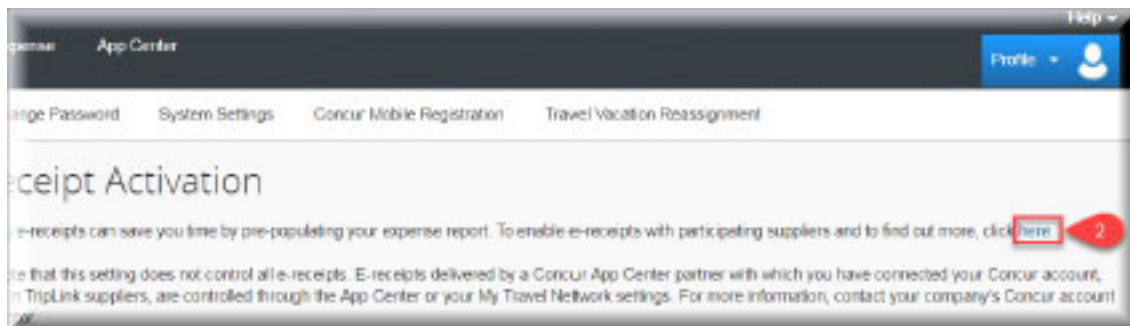

Figure 3. Activate E-Receipts – Step 2.

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DESKTOP APPLICATION

SEARCH FOR FLIGHTS

When it's time to book travel, it's important to address these six specific fields on the Travel home page (see Figure 4).

1. Select whether this reservation is for a:
   - Flight, then click 🛩;
   - Car, then click 🚗; or
   - Hotel, then click 🛏;

2. Select Round Trip, One Way, or Multi City based on the flight need.

3. Enter the name of, or find/search for, the departure and/or arrival city or airport.

4. Select the departure and/or return dates and the approximate time frames for the desired flights.

5. Always search by "Schedule."

6. Click Search.

> **IMPORTANT:**
>
> If this reservation will include a flight, car, and/or hotel, click on 🛩 to book them all together.

> **IMPORTANT:**
>
> • **Concur is not to be used for personal travel booking.**
>
> • **When booking work travel that requires a guest from outside of the company (e.g., spouses at regional parties, etc.), international travel, or travel for 10+ attendees, send an e-mail to DTC_ Travel for assistance with booking.**
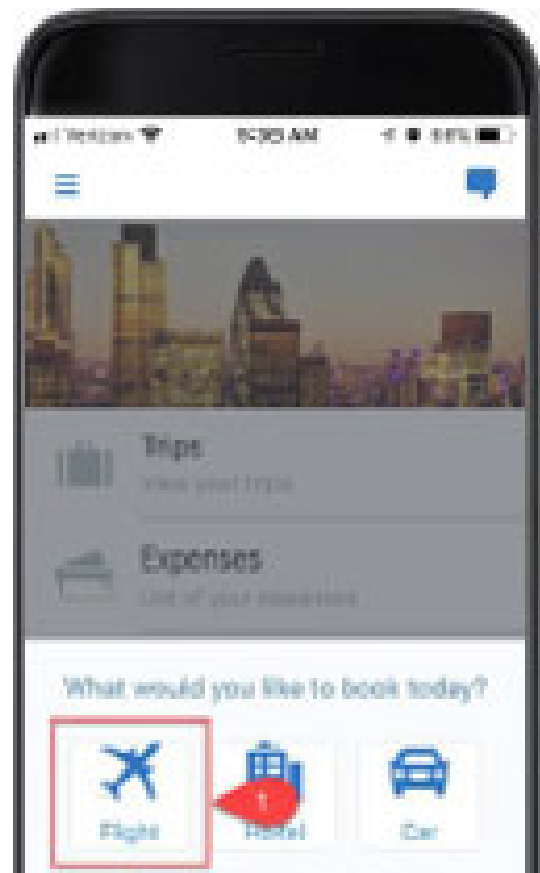
Figure 4. Search for Flights Steps.

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DESKTOP APPLICATION

SELECT FLIGHTS

After clicking Search on the Travel homepage, refer to Figure 5 to select flights.

Figure 5. Select Flights – Search Results.

1. This is the search results matrix. Flight results are organized by airline and stops. Results can be viewed in this matrix; or the matrix can be hidden and results are shown in the list view (2).

2. This is the list view of the search results. It is shown directly below the matrix. Available flights are listed by airline, departure/arrival times, and stops (if any). The list view will also show Discount Tire Co. preferred airlines.

3. The list view is defaulted to show the Depart tab. Scroll through the list and click Select (3a) to choose the desired flight. The view will then automatically switch to the Return tab to allow selecting that flight.

4. The search and filter options on the left side of the page allow for changing search parameters and filtering search results by departure time and airports.

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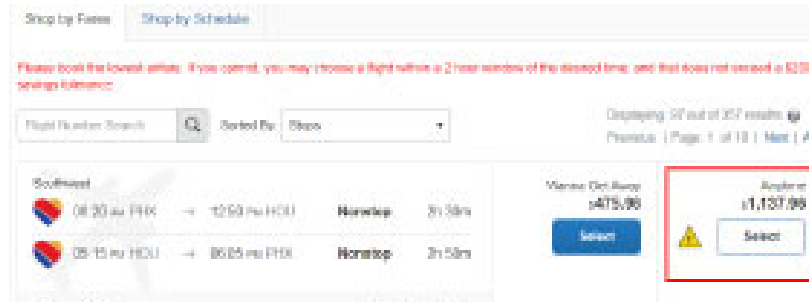## DESKTOP APPLICATION

BROKEN TRAVEL RULE
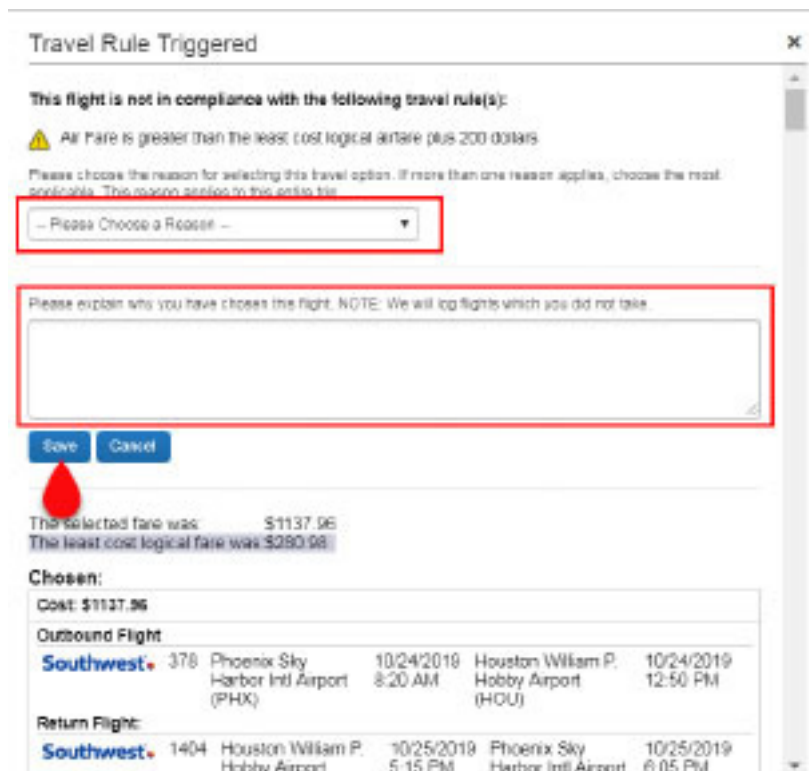
If the ⚠ icon appears next to the Select button of a flight, a travel rule has been broken (see Figure 6).

Figure 6. Broken Travel Rule.

If the flight is selected, a pop-up window will appear asking the user to justify why the rule has been broken (see Figure 7). Provide the requested information and click Save. The employee's manager will review the justification when prompted to approve the employee's travel.

Figure 7. Broken Travel Rule Justification Pop-Up.

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DESKTOP APPLICATION

RESERVE FLIGHTS

On the Review and Reserve Flight page (see Figure 8):

1.   Review the flight information.

2.   Enter traveler Information.

3.   Select the seat assignment (if given the option).

4.   Review the price summary.

5.   Select method of payment.

Figure 8. Review Booking Information.

To reserve the flight, click Reserve Flight and Continue (see Figure 9). This concludes the transaction.

Figure 9. Reserve the Flight.

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DESKTOP APPLICATION

SEARCH FOR A CAR

If a car is booked along with the flight, the car search results page (see Figure 11 on page 9) will be displayed automatically after reserving the flight. That means, the following search step is not necessary.

If a car is booked without a flight, refer to Figure 10, the Travel Homepage, and follow the four steps for searching for a car.
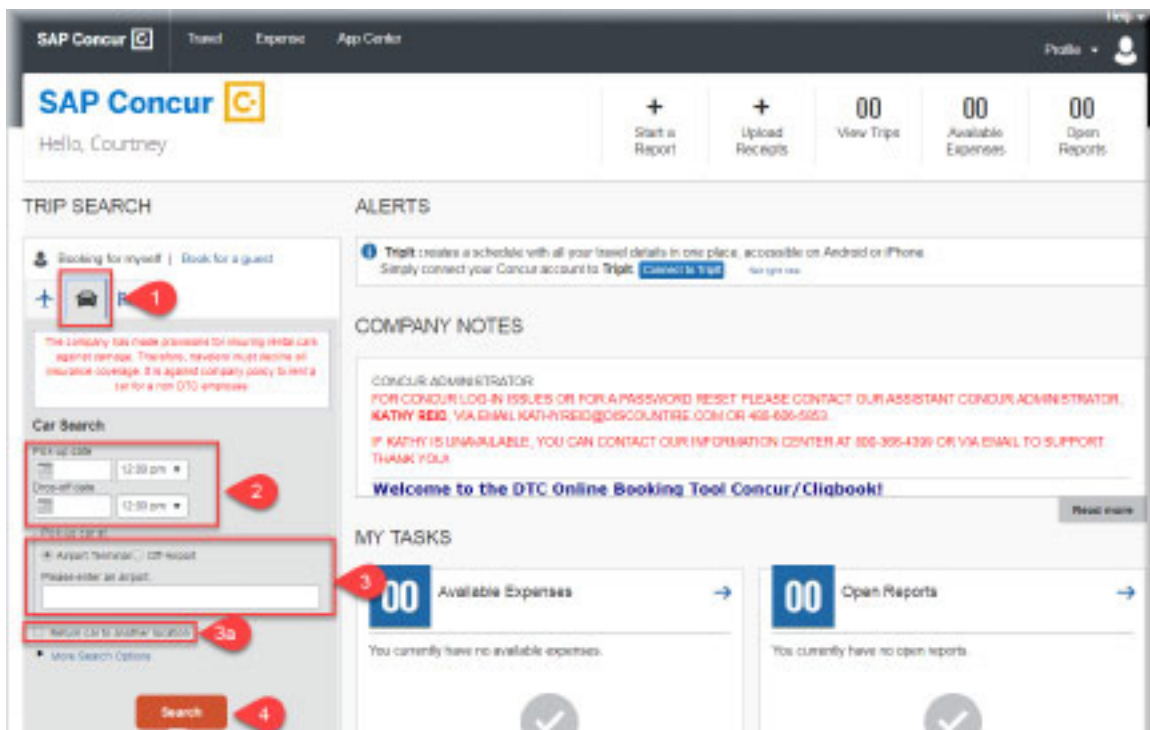
Figure 10. Search for a Car.

1. Click

2. Select the pick-up and drop-off date and time.

3. Enter the airport at which the car will be picked up and dropped off.

> **NOTE: The rental car can also be dropped off at a different airport location, if needed. Check the Return car to another location box to enter the second location.**

> **REMINDER**
>
> **If the Reservation will include a flight, car, and/or**
>
> **hotel, click on** ⊞ **to book them all together.**

4. Click **Search**.

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Refer to Figure 11 to select a car.

SELECT A CAR

> **IMPORTANT:**
>
> **All travelers MUST decline all insurance coverage. The company has made provisions for insuring rental cars against damage.**

> **COMPANY POLICY:**
>
> **If booking a car for less than 4 travelers, it must be a mid-size car. Full-size cars are for 4+ passengers only.**

Refer to Figure 11 to select a car.

1. This is the search results matrix. It provides car costs by vendor and car type (note, it is sorted by company policy compliance). The matrix can be hidden to view the results in list format only.

2. These are results in a list format. Here, the cars can be viewed by company preferred vendor, type of car, daily rate, and total cost. This view also provides information on the details and location of the car.

3. Results can be filtered by additional information, such as transmission type, hybrid, and others. Search criteria can also be changed here, if needed.

4. Click on the Total cost button to review and reserve the car.

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DESKTOP APPLICATION

SEARCH FOR A HOTEL

If a hotel is booked along with the flight and/or car, the hotel search results page (see Figure 14 on page 12) will be displayed automatically after reserving the flight and/or car.

Figure 13, the Travel Homepage, shows the four steps for searching for a hotel, if the hotel is booked alone.
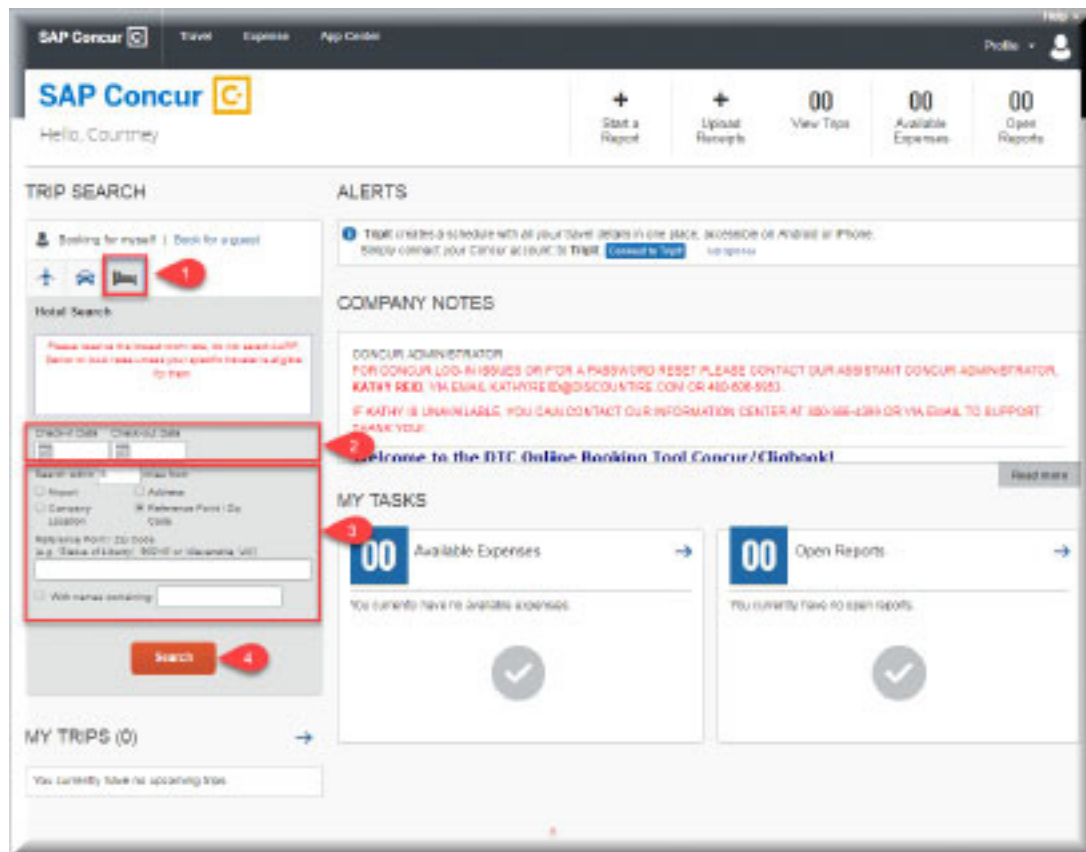
Figure 13. Search for a Hotel.

COMPANY POLICY:

• **Do not select AARP, Senior, or AAA rates unless the traveler is eligible for them.**

• **Do not select non-refundable rooms, even though they may be cheaper. They are difficult to cancel if travel plans change.**

REMINDER

If the Reservation will include a flight, car, and/or

hotel, click on   to book them all together.

1. Click
2. Enter the check-in and check-out dates.
3. Enter a specific location, if there is a preference (e.g., near an airport or office address).
4. Click Search.

DESKTOP APPLICATION

SELECT A HOTEL

After having searched for a hotel room, refer to Figure 14 to reserve one.

Figure 14. Hotel Search Results.

1. This is the map showing locations of hotel options. Navigate the results by clicking on the numbers corresponding to the hotels in the area. The map can be hidden to focus on the list format view.

2. These are the results in list format. The proximity to the location specified during the search, star rating, company preference, and price are provided.

3. Results can be filtered by price, brand, amenities, etc. Additionally, search criteria can be changed, if needed.

4. Click **Hotel details** to see hotel contact information, description, general room information, facilities, pet policies, and other information.

5. Click **View Rooms** to see all available room options, rules and cancellation policies, and amenities.

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SELECT A ROOM

After clicking View Rooms (see Label 5 on Figure 14), click the price button next to the desired room (see Figure 15).
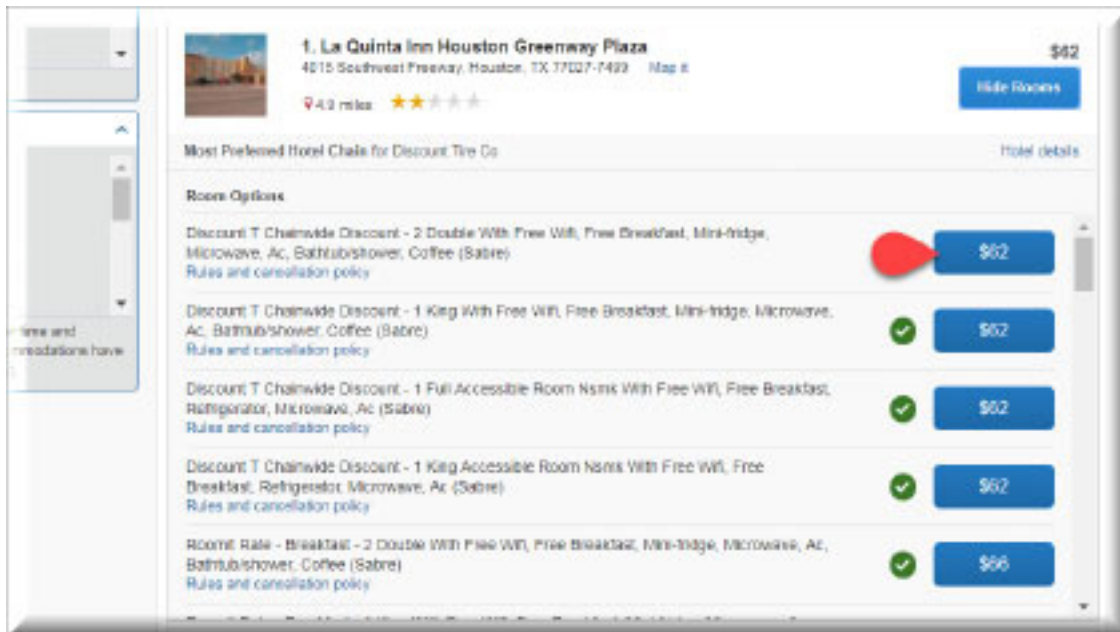
Figure 15. Select a Room.

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RESERVE A HOTEL

Once a room is selected, refer to Figure 16 on page 14 and follow these steps to reserve it.

1) Review the hotel and room selection.

2) Enter guest information.

3) Review price summary.

4) Select method of payment.

5) Agree to the hotel's rate rules, restrictions, and cancellation policy.

6) Click **Reserve Hotel and Continue.**

Figure 16. Reserve a Hotel.

DESKTOP APPLICATION

REVIEW TRAVEL DETAILS

After confirming the flight, car, and/or hotel details, review the full itinerary on the Travel Details page (see Figure 17), scroll to the bottom of the page, and click Next >> to finalize or Cancel Trip to start over.

Figure 17. Review Travel Details.

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ADD TRIP BOOKING INFORMATION

After confirming the itinerary, enter any necessary information on the Trip Booking Information page (see Figure 18).

1. Name the trip (optional).
2. Add a description of the trip (optional).
3. Add comments for the travel agent (optional).
4. Add email addresses of any colleagues that might need a copy of the itinerary.
5. Click **Next.**

Figure 18. Add Trip Booking Information.

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CONFIRM & PURCHASE THE TRIP

On the Trip Confirmation page (see Figure 19), click the Purchase Ticket button to complete the booking. If the trip needs to be canceled,click the Cancel Trip button.

Figure 19. Confirm and Purchase the Trip.

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DESKTOP APPLICATION

VIEW, EDIT, AND CANCEL TRIP(S)

To view, edit, or cancel trips, click Trip Library from the Travel home page (see Figure 20).
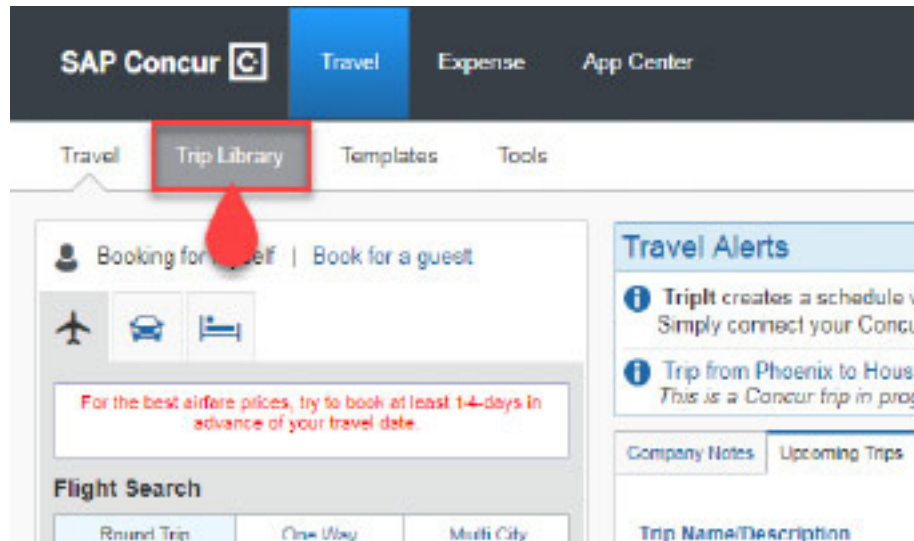
Figure 20. Access Trip Library from Travel Home Screen.

The Trip Library page (see Figure 21) lists all past, present, upcoming, and cancelled trips for viewing, editing, or cancellation, as needed.
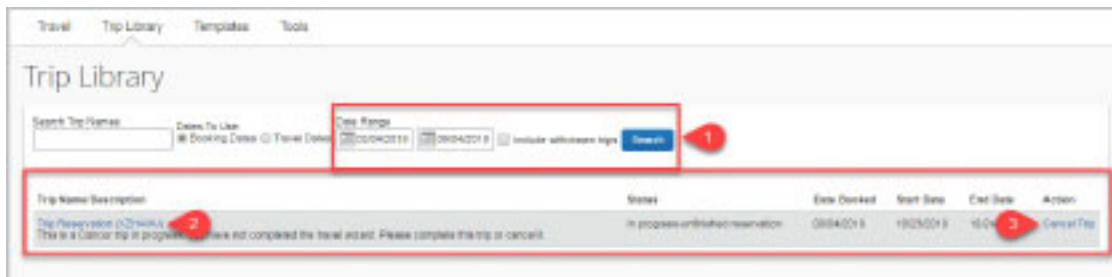
Figure 21. View/Edit/Cancel Trips.

1. Change the date range and click **Search** to narrow down the trips shown in the results list.

2. Click the name of the trip to view/edit the trip itinerary details.

3. Click **Cancel Trip** to cancel it.

> **NOTE: Depending on what kinds of flight and/or hotel room(s) were booked, refunds for cancellations may not be available. In such cases, contact CWT at 1-763-329-2465. Have your 6 alpha character code called your record locator, along with the access code DV8G, available for this call.**

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MOBILE APP

DOWNLOAD MOBILE APP

Log into the Concur account on a desktop computer. From the Travel home page (see Figure 22):

1. Select Profile from the upper right-hand corner.

2. Select Profile Settings.
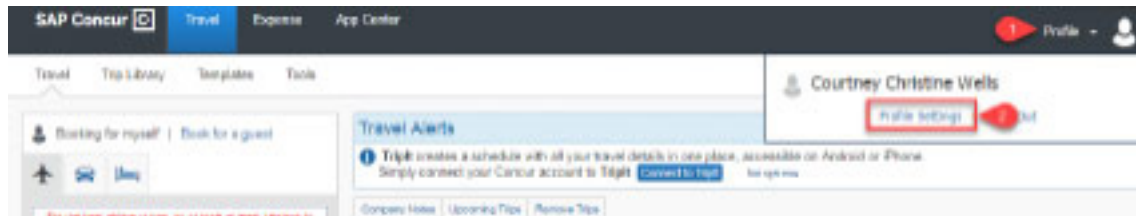
Figure 22. Access Profile Settings.

3. Select Concur Mobile Registration on the Profile Options page (see Figure 23).
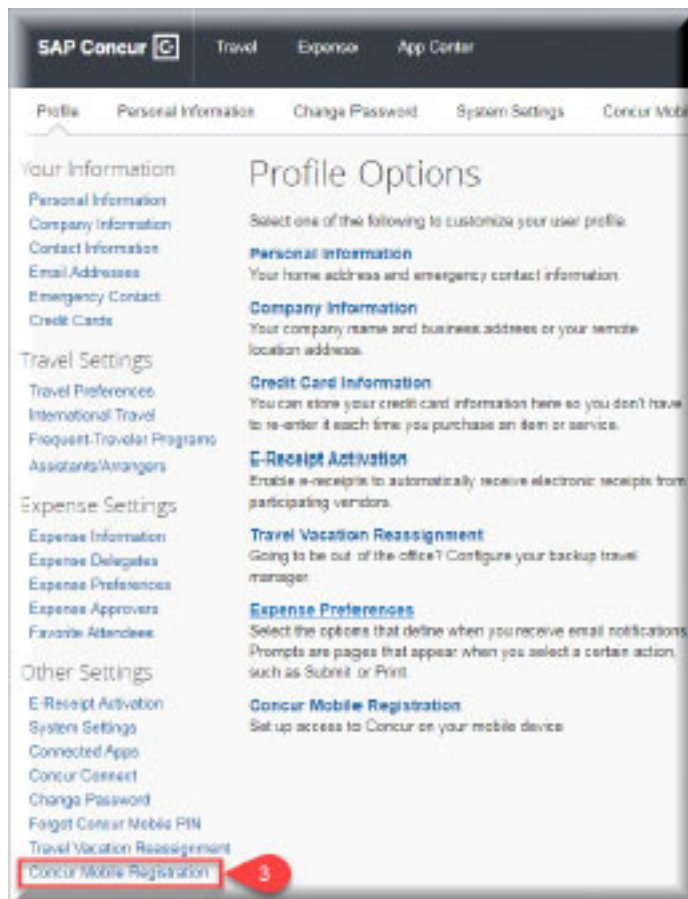
Figure 23. Access Concur Mobile Registration.

4. Enter a valid email address that can be accessed from a mobile device and click **Get Started** to have the app download link sent to that email (see Figure 24).

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MOBILE APP

DOWNLOAD MOBILE APP (*CONTINUED...*)

5. Review and confirm existing sign-in details (see Figure 24).
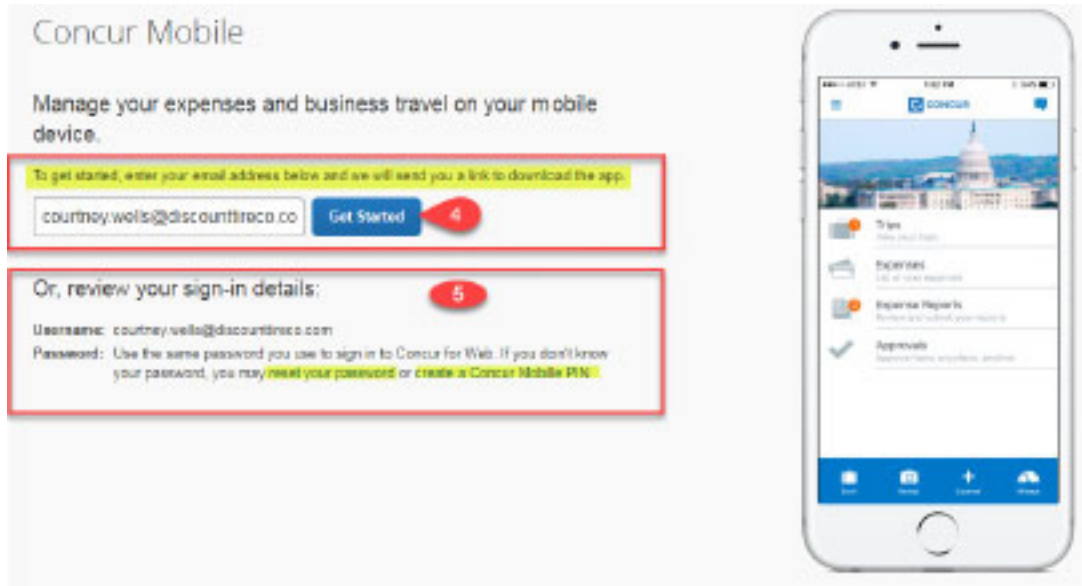
Figure 24. Register Concur Mobile App.

6. Using the mobile device that the Concur App will be downloaded on, open the e-mail from Concur and tap on the **Tap here to install Concur Mobile** link to set up the Concur Mobile App (see Figure 25).
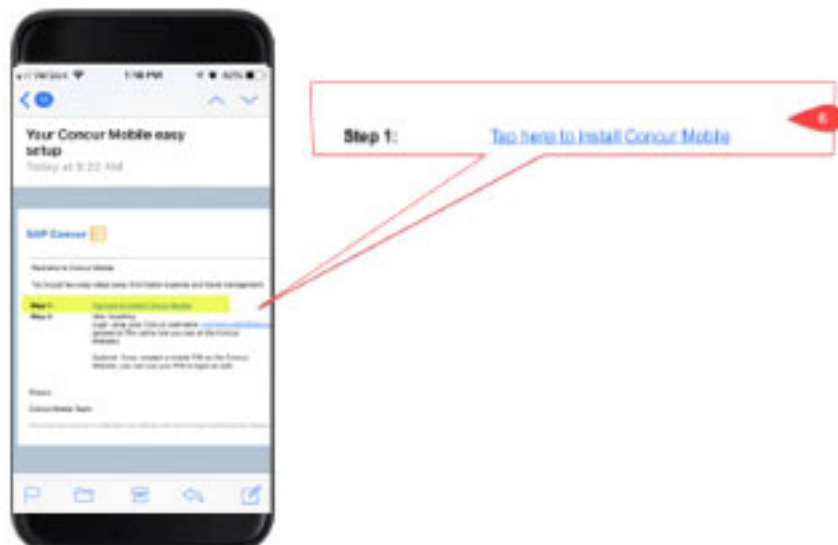
Figure 25. Download Mobile App

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MOBILE APP

SIGN INTO APP

After the download and installation is completed tap the [C] icon on the mobile device to open the App, then:

1. Enter the same username (1) used on the Concur website, then tab Next (2) (see Figure 26).

2. Then enter the Concur password (1) used on the website, or the PIN (if one was created by the user), then tab Sign in to Concur (2) (see Figure 27).
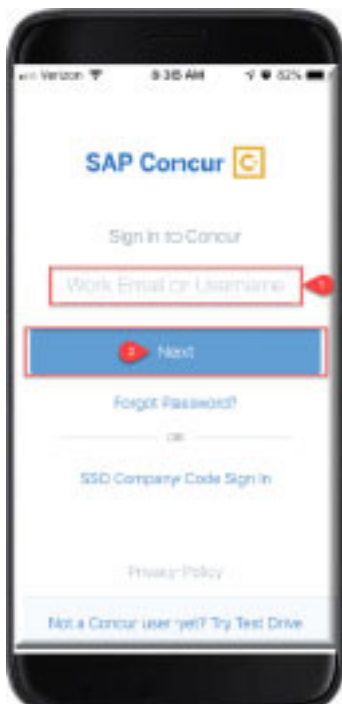
Figure 26. Mobile App Sign in – Username.
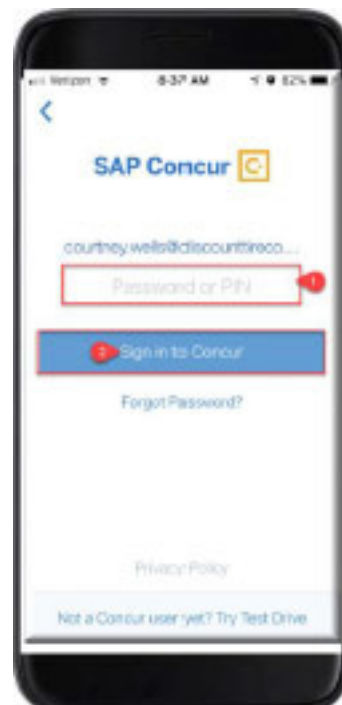
Figure 27. Mobile App Sign in – Password or PIN.

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MOBILE APP

GET HELP

To get help (see Figure 28), tap the Menu icon (1), then (on the menu screen) tap Help (2), and (on the Help screen) either enter a search term (3) or tap on a general question in the Knowle dge base section (4).

Figure 28. Get Help.

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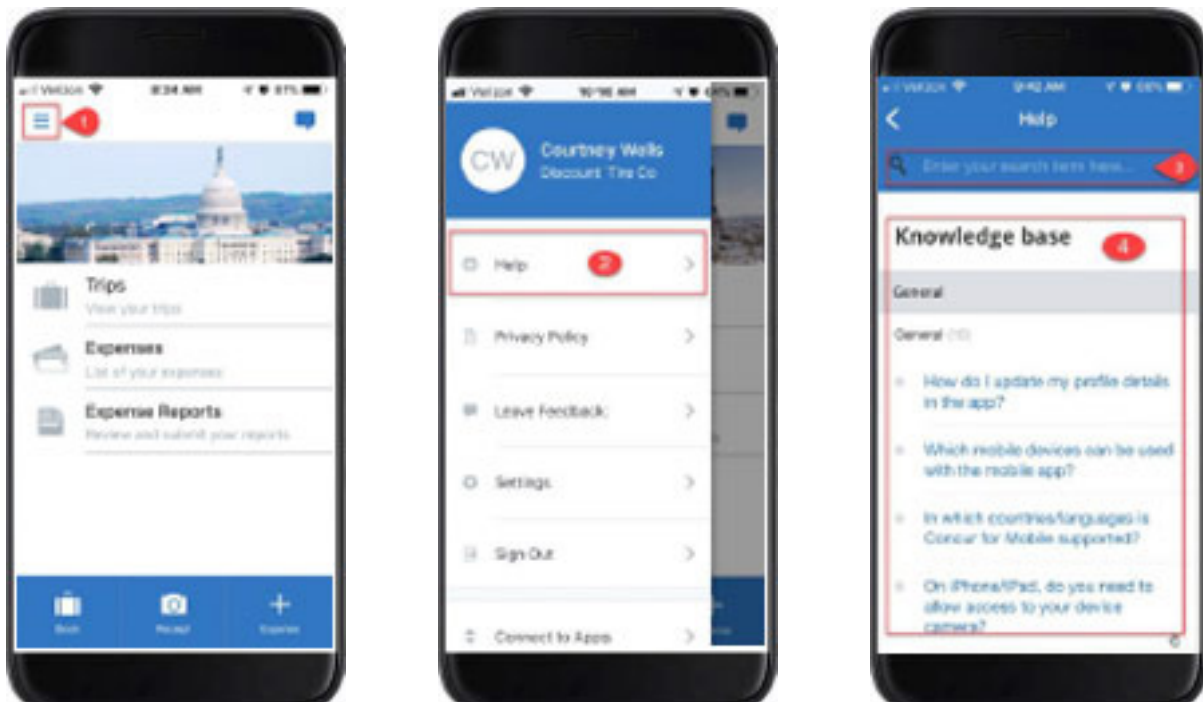
MOBILE APP

BOOK TRAVEL

To begin booking travel, navigate to the mobile app home page (see Figure 31) and

1.   Tap the Book icon
2.   Tap the type of travel to be booked (flight, hotel, or car).

Figure 31. Book Travel.

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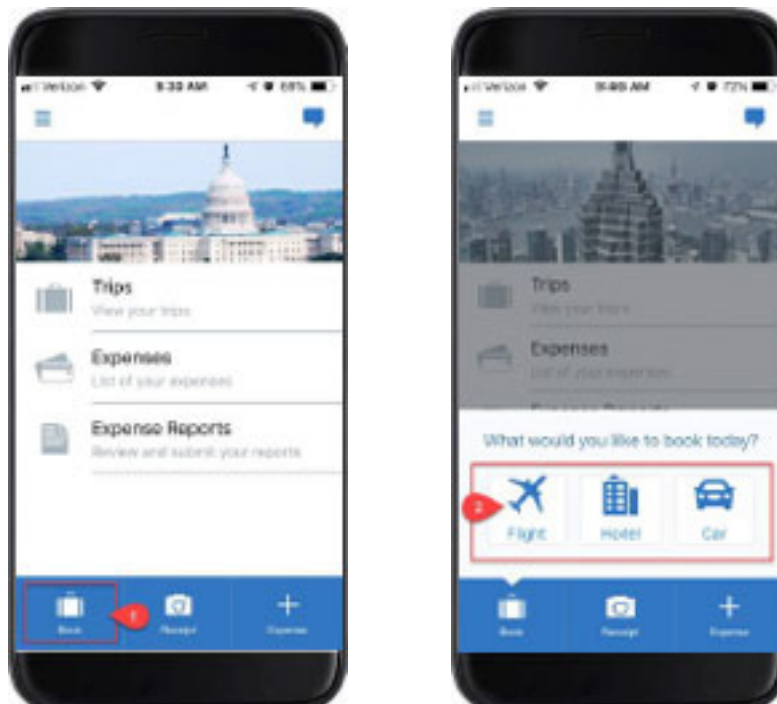
MOBILE APP

SEARCH FOR FLIGHTS

To search for a flight, follow these steps (see Figure 32):

1. Tap the Flight icon from the Book menu

2. Enter search criteria

3. **Tap Search**
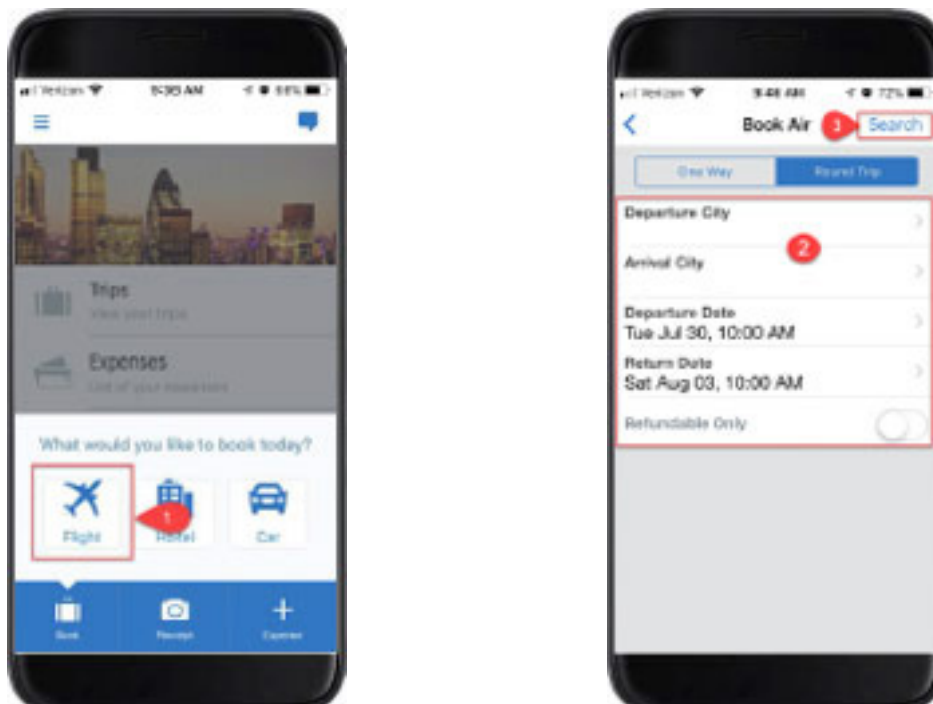
Figure 32. Search for Flights.

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MOBILE APP

SELECT AND RESERVE FLIGHTS

To select and reserve flights, follow these steps (see Figure 33):

1.Review the results summary and tap on the desired departing and reserved flights (1a) to add to the itinerary.

2. Once flights have been chosen, review the flight details and tap Reserve.
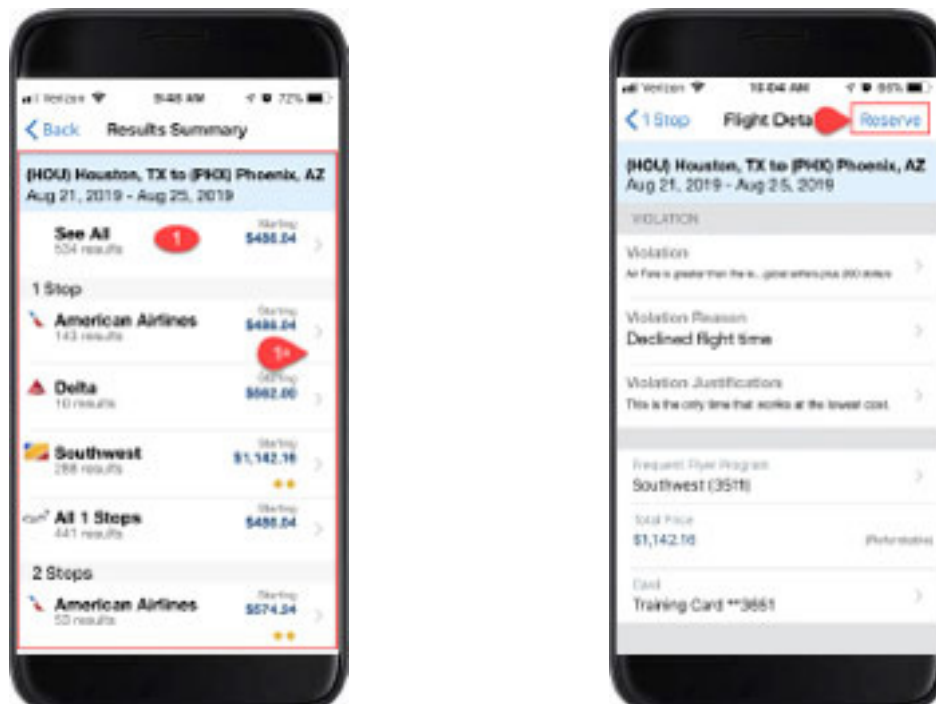
Figure 33. Select and Reserve Flights

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TRAVEL POLICY VIOLATIONS

If there is a ⚠️ icon next to the chosen flight, that means the travel policy has been violated (see Figure 34).

1. Review the results summary and tap on the desired departing and reserved flights (1a) to add to the itinerary.

2. Once flights have been chosen, review the flight details and tap Reserve.
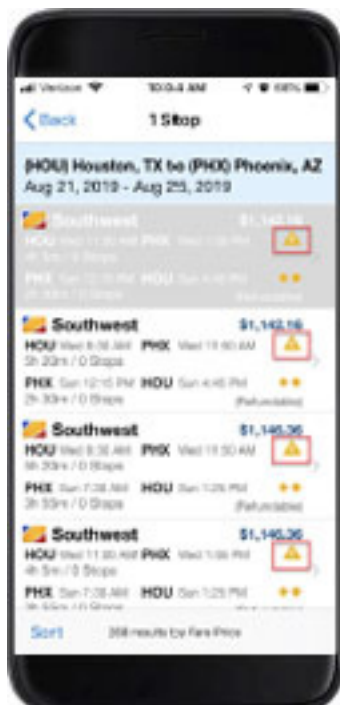
Figure 34. Travel Policy Violation
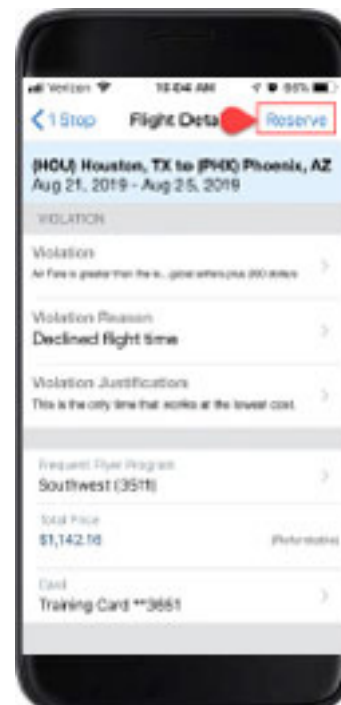
Figure 35. Violation Reason and Justification.

A written justification will need to be provided by whoever is booking the flight for a manager to approve.

A violation reason must be included along with the violation justification prior to tapping Reserve (see Figure 35).

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MOBILE APP

SEARCH FOR A CAR

To search for a car, follow these steps (see Figure 36):

1. Tap **Book Car** after booking the flight, or

2. If only reserving a car, tap **Car** from the home screen.

3. Complete search criteria.

4. Tap **Search.**

Figure 36. Search for a Car.

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MOBILE APP

SELECT & RESERVE A CAR

To select and reserve a car, follow these steps (see Figure 37):

1. Tap on the car that looks like the best fit based on vendor preference and price.
2. Review the pick-up/drop off details and vendor information on the next screen.
3. Tap **Reserve.**
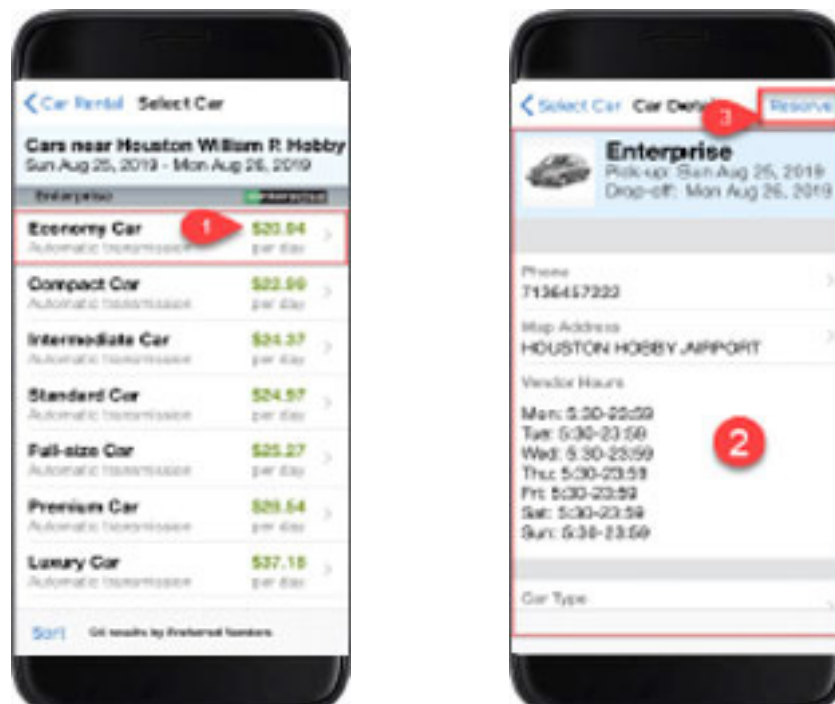
Figure 37. Select and Reserve Car.

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SEARCH FOR A HOTEL

To search for a hotel, follow these steps (see Figure 38):

1.   Tap **Book Hotel** after booking the flight, or

2.   If reserving a car only, tap **Hotel** from the home screen.

3.   Complete search criteria.

4.   Tap **Search.**
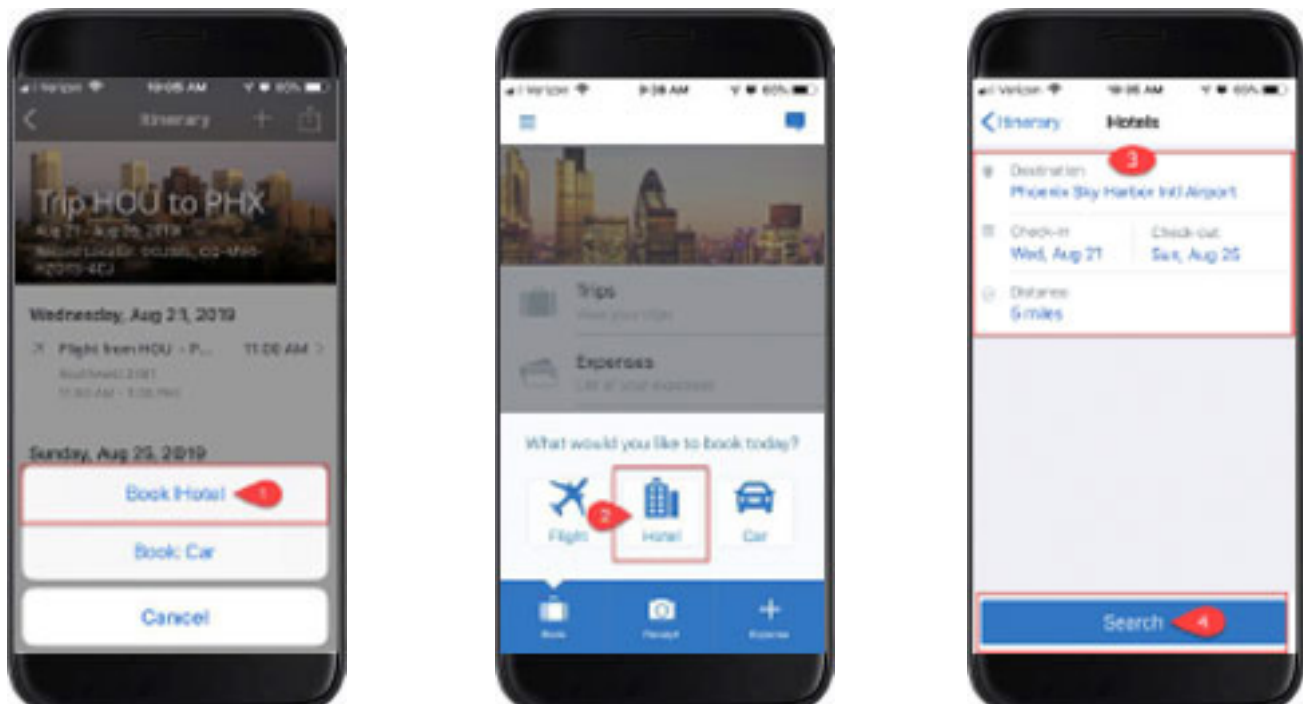
Figure 38. Search for a Hotel.
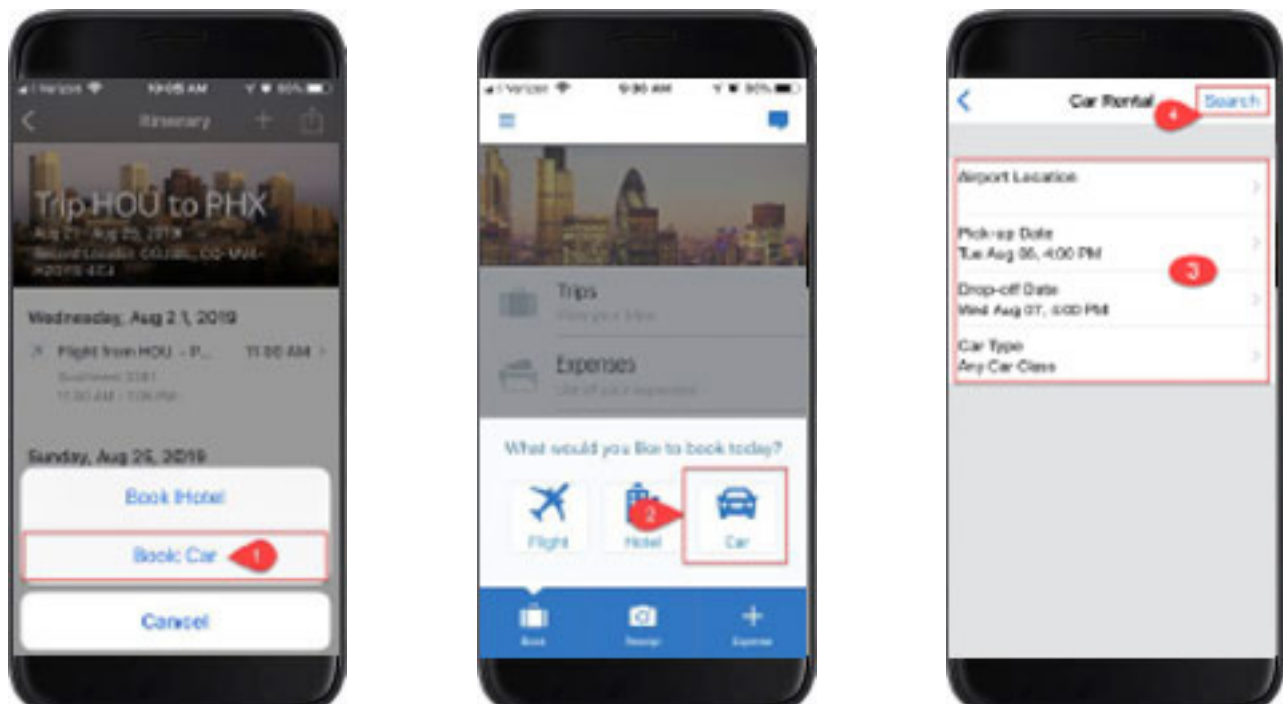
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SELECT & RESERVE HOTEL/ROOM

To select and reserve a hotel and room, follow these steps (see Figure 39):

1. Review full list of hotel search results and tap on the preferred hotel (1a).

2. Browse available rooms in the results list on the next page and choose a room by tapping on the room description (2a).

3. Review Total cost and hotel cancellation policy.

4. Tap Reserve Room.

IMPORTANT:

Consider preferred hotel vendors and price when choosing a hotel room. Do NOT book with deposit required or non-refundable.

Figure 39. Select & Reserve Hotel/Room.

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MOBILE APP

VIEW AND EDIT TRIPS

To view and edit trips, follow these steps (see Figure 40):

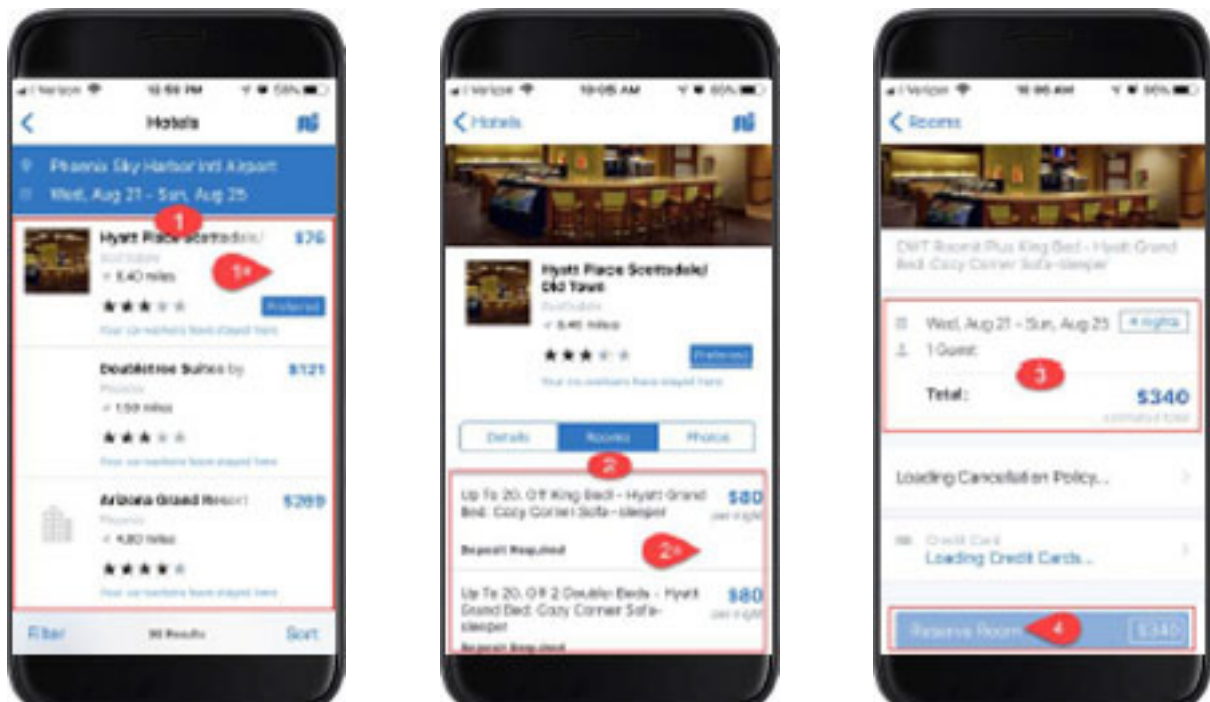1.   Tap on Trips from the app homepage.

2.   View upcoming trip itineraries by tapping on them under the Upcoming tab.

3.   The trip itinerary details will show on the next page.

4.   Tap + to add flight, hotel, or car to the itinerary, if needed.
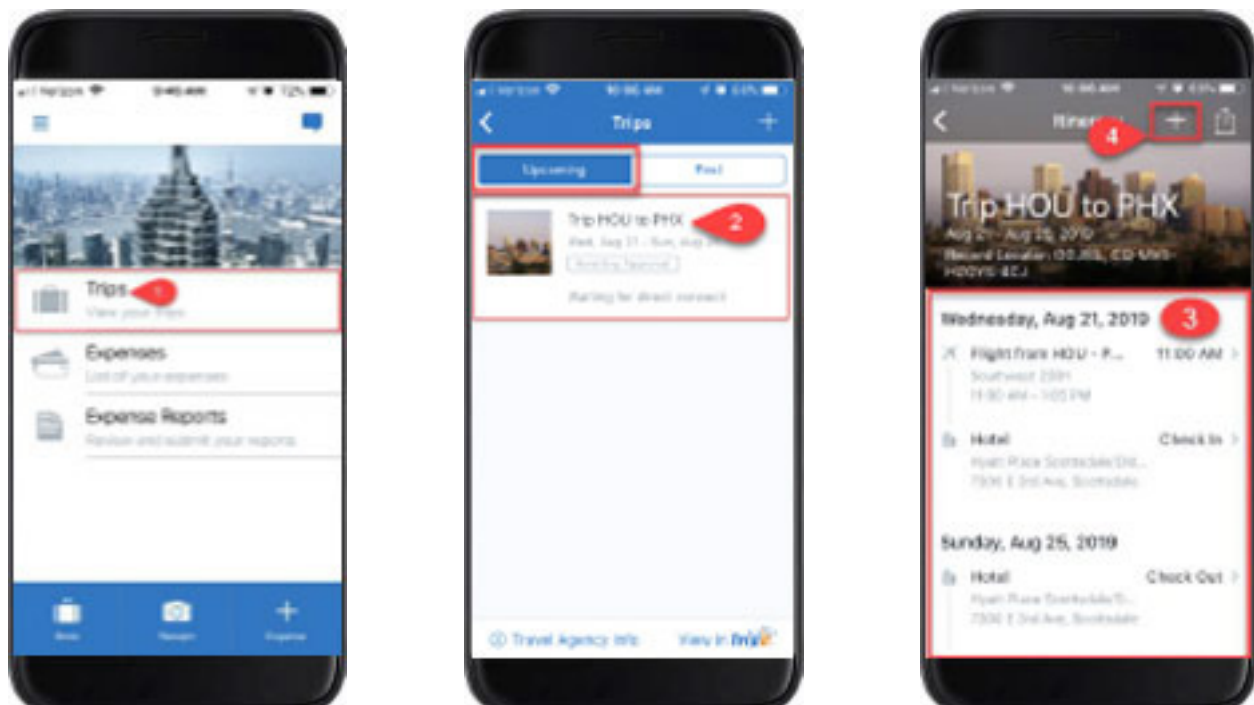

Figure 40. View and Edit Trips.

Provided by: L&D – Courtney Wells
Designed by: L&D – Chris Hintz

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MOBILE APP

CONTACT

For assistance booking travel for yourself and a spouse/guest who will be traveling on the same flight, international travel, or travel for any group of ten or more attendees, e- mail: **mspteamdedicated.us@contactcwt.com**

For assistance with all other travel inquiries, contact the Concur Travel Help Desk (available 24 hours a day, 7 days per week) at:

• 763-329-2465

      o Have your 6 alpha character code called your record locator, along with the access code **DV8G** available during this call.

Find more guides on booking flights, renting cars, and reserving hotels on the Corporate tab of the Knowledge Center under the Travel tab.

For further questions of a non-technical nature, please contact Learning & Development at:

L&D_Logisticsmembers@discounttire.com

For help with technical issues please contact the help desk at:

• Stores: **66007**

• Corporate: **66008**

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