

# GA Travel and Expense

With Concur Technologies



## Travel Assistant Handbook



## Table of Contents

<b>WELCOME TO GA TRAVEL &amp; EXPENSE</b> .....	<b>3</b>
<b>SECTION 1: LOG ON TO GA TRAVEL &amp; EXPENSE (CONCUR)</b> .....	<b>3</b>
<b>SECTION 2: LOGIN AS TRAVEL ASSISTANT FOR ANOTHER USER</b> .....	<b>4</b>
<b>SECTION 3: LOGOUT AS TRAVEL ASSISTANT FOR ANOTHER USER.</b> .....	<b>5</b>
<b>SECTION 4: MAKE A TRAVEL RESERVATION</b> .....	<b>6</b>
<b>STEP 3: SELECT A HOTEL</b> .....	<b>10</b>
<b>SECTION 5: CANCEL OR CHANGE AN AIRLINE, CAR RENTAL, OR HOTEL RESERVATION</b> .....	<b>13</b>
CHANGE A RESERVATION.....	13
CANCEL A RESERVATION .....	14
<b>SECTION 6: TRIP TEMPLATES</b> .....	<b>17</b>
MAKE A TEMPLATE FROM AN UPCOMING TRIP.....	17
MAKE A TEMPLATE USING THE TEMPLATES MENU.....	17
BOOK A TRIP FROM A TEMPLATE .....	21
DELETE A TEMPLATE .....	22
<b>SECTION 7: CLONE A TRIP</b> .....	<b>24</b>
CREATE A CLONED TRIP.....	24
USING A CLONED TRIP TO BOOK MULTIPLE TRAVELERS .....	<b>ERROR! BOOKMARK NOT DEFINED.</b>
<b>SECTION 8: SHARE A TRIP</b> .....	<b>28</b>



## Welcome to GA Travel & Expense

GA Travel & Expense with Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools State of Georgia travelling employees need to book travel as well as create and submit expense reports. Managers use the service to review and approve expense reports, Cash Advance Requests and Travel Requests. Back-office employees use the service to produce audit reports, ensure Travel Policy compliance, and deliver business intelligence to help the State of Georgia reduce its costs.

### Section 1: Log on to GA Travel & Expense (Concur)

#### How to...

1. Log on to GA Travel & Expense with the username and password provided by your Local GA Travel & Expense Administrator.
2. Access GA Travel & Expense from the [SAO website](#) or [www.concursolutions.com](http://www.concursolutions.com) .

#### Additional Information

Your password is case sensitive.

If you are not sure how to log on, check with your Local GA Travel & Expense Administrator or contact the SAO Customer Service Center.

You may even have access from your Agency intranet.

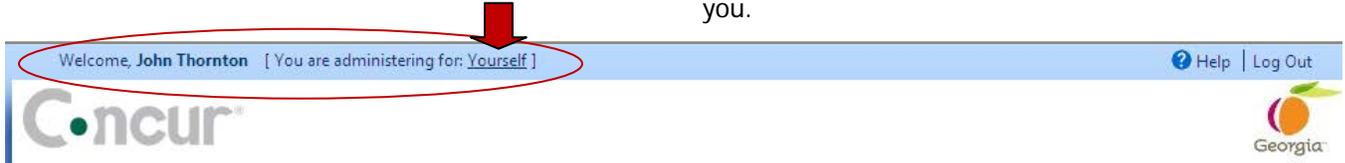


## Section 2: Login as a Travel Assistant

Travel Assistants can make travel arrangements for another user and are “appointed” by that user. This is called “administering” for another user.

### How to...

1. Login under your own credentials.



### Additional Information

The *My Concur* page displays and all access is as you.

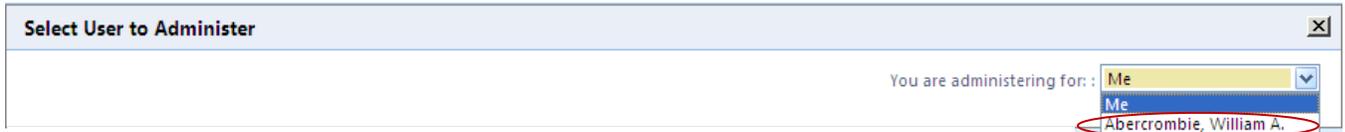
2. Click on Yourself.

The **Select User to Administer** dialogue box opens.



3. Click on dropdown box to display a list of users you are acting as a Travel Assistant for.

Only the user can make another person a Travel Assistant on their behalf. This is done in the **Profile**.



4. Select the user you wish to administer.



The system advises you that you are now administering for the user you selected.

All the actions you take now are on behalf of this user.

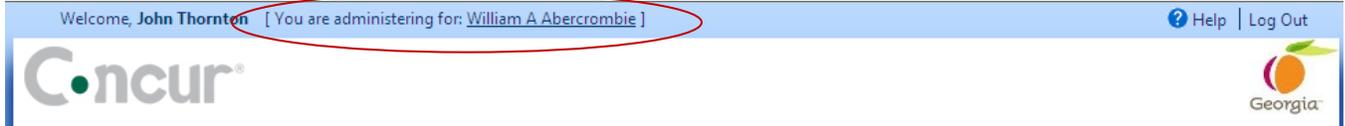


## Section 3: Logout as Travel Assistant for another User.

### How to...

### Additional Information

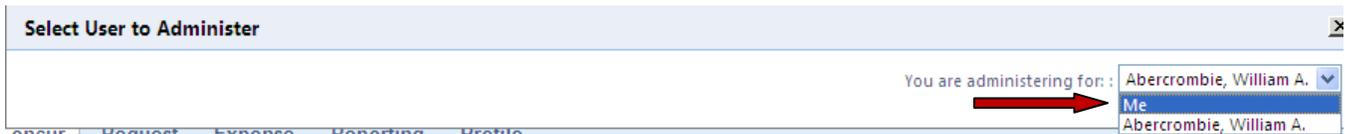
1. Click on the name appearing after "You are administering for:"



2. Click on the down arrow in the **Select User to Administer** dialogue box.



3. Click on **Me** in the dropdown list.



4. You have exited Travel Assistant Mode.



Note: You are administering for whoever displays after "**You are administering for:**" As long as it says Yourself you are out of Travel Assistant "mode."



## Section 4: Make a Travel Reservation

### Step 1: Make a Flight Reservation

#### How to...

- Go to Trip Search on the *My Concur* page.
- On the **Flight** tab, select one of these:
  - Round Trip
  - One Way
  - Multi-Segment
- In the **Departure City** and **Arrival City** Fields, enter the cities for your travel.

#### Additional Information

If you have a car or hotel to book without airfare, use the corresponding tabs.

When you type in a city, airport name, or code, Travel will automatically search for a match

- In the **Departure** and **Return** fields, select the preferred travel dates and times.
- If you need a car, select **Pick-up/Drop-off car at airport**.
- If you need a hotel, select **Find a Hotel**. Select search parameters.
- Select **Non-Refundable**.

You can also select the appropriate **Departure** and **Return** times and time range. Travel searches before and after the time you select.

To view refundable and non-refundable options, select **Refundable**.



## GTE Travel & Expense System: **Travel Assistant Handbook**

8. In the **Search Flights By** field, **Price** is the default view. You will be able to view by schedule on a secondary tab in the results.
9. Click **Search**.
10. Flight search parameters can be changed in the panel to the right of the flight matrix to refine your search.
11. Select flight from the flight matrix that appears. Click **Show Details** for more flight data and to preview seat availability
12. Click the **View Seat Map** icon next to the flight to preview the availability of seats. You cannot book a seat at this point. The reservation will default to the seat preference set in your Profile.
13. Select any green (unoccupied) seat and position the mouse pointer over a seat to see the seat number.

**Policy Note:** Refundable fares must be within \$50 of a Non-Refundable fare. To search and compare pricing on Refundable and Non-Refundable fares select **Refundable**.

**Policy Note:** Choose lower cost flights within +/- 2 hours of preferred flight times when this fare saves \$200 or more roundtrip.

**Policy Note:** Choose connecting flights over non-stop if it adds 2 hours or less to travel time and saves \$200 or more. Not required if change of airline at the connection point is required.

**Policy Note:** Domestic flights – coach class only. Upgrades after booking are at traveler's expense. International flights: Business class is reimbursable when the nonstop portion of the flight exceeds 8 hours. Do not include layover time.

Click **show details** to expand flight information, to view fare rules and, if needed, to add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.

Reservations within Georgia Travel Policy guidelines will display a green reserve button, those outside policy a gold reserve button. You can book out of policy, but will need to explain why in the reservation process. This is Audited by the State.

You can change the seat after later in the reservation process.

Select preferential seats (highlighted in yellow) if you have preferred status on the selected airline. Your frequent flyer number must be in your Travel profile. If you select a preferential seat and this information is not in Travel, your seat request might not be honored.

Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.



## Section 4: Make a Travel Reservation

### Step 1: Make a Flight Reservation (Continued)

How to...

Additional Information

14. Click the appropriate seat to select it, and then click **Select Seat**.

To change your seat, click the seat you prefer. Point to a seat to view the seat number.

After you select your seat for a flight, you can either click **Change Seat** or select the next flight in your reservation. Travel will prompt you to save your new seat selection.

15. Once you have made your seat selection, click **Close**. Repeat for all flights.

16. From the **Shop By Fares** tab, click **Reserve** to select your airfare.

Policy information appears next to the Reserve button. The Reserve buttons are color coded as:

- A green Reserve button indicates the fare is within policy.
- A yellow Reserve indicates the fare is outside of policy. If you select this fare, you must enter additional information.
- A red Reserve button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager.



## Section 4: Make a Travel Reservation

### Step 1: Make a Flight Reservation (Continued)

How to...
Additional Information

Seattle, WA To Dallas, TX Nov 22 - Nov 25

Carrier	Price	Results
All		88 results
United		
Alaska Airlines		
American	317.40	4 results
Multiple Carriers		
Frontier		
Airtran Air	361.80	1 results
US Airways	586.80	1 results

Shop by Fares	Shop by Schedule	Sorted By
Shop by Fares	Shop by Schedule	Policy - Most Compliant

Price	Carrier	Depart	Arrive	Stops / Duration
\$364.10	Alaska Airlines	SEA 7:00 am ⇒ DFW 12:50 pm	DFW 4:35 pm ← SEA 10:12 pm	0 / 3h 50m
\$364.10	Alaska Airlines	SEA 7:00 am ⇒ DFW 12:50 pm	DFW 4:35 pm ← SEA 11:40 pm	1 / 6h 5m
\$364.10	Alaska Airlines	SEA 7:00 am ⇒ DFW 12:50 pm	DFW 5:50 pm ← SEA 11:40 pm	1 / 6h 5m

### Step 2: Select a Car

How to...
Additional Information

1. If you selected **Pick Up/Drop off Car at airport** on the **Flight** tab, you will see the results for the car search.
2. Select the appropriate rental car, and then click **Reserve**.

If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

You can sort the car results to help find your selection.

Yellow diamonds indicate preferred vendors and your preferred car type will be selected automatically.



## Section 4: Make a Travel Reservation

### Step 2: Make a Car Reservation (Continued)

How to...		Additional Information						
<p>Picking up the car at: (DFW) on Thu, Dec 29 5:00 PM Returning on Sun, Jan 1 7:00 AM</p> <p><a href="#">Print / E-mail</a></p> <p><a href="#">Hide matrix</a></p>		<p><b>Car booking options</b></p> <p><input type="checkbox"/> Ski rack</p> <p>Message to Vendor: <input type="text"/></p> <p>Use the following Car Program: <input type="text"/></p> <p><a href="#">+ Add car Mileage Program</a></p>						
<p>All 23 results</p>								
	8.47	8.47	9.14	10.65	11.32	27.13	27.15	
	15.92	16.81	17.81	18.47	19.56	52.31	52.56	
<p>Displaying: 23 out of 23 results.</p> <p>Sorted By: <input type="text" value="Policy - Most Compliant"/></p>		<p>Change Car Search <input type="text"/></p> <p>Car Display Filters <input type="text"/></p> <p>Choose currency: <input type="text" value="USD \$"/></p> <p><input type="checkbox"/> Unlimited miles</p> <p><input type="checkbox"/> Air conditioning</p> <p><input type="checkbox"/> Hybrid</p> <p>Car Transmission</p> <p><input type="checkbox"/> Automatic</p> <p><input type="checkbox"/> Manual</p>						
<p><b>Economy Car</b> (Worldspan) </p> <p>\$15.92 per day (Corporate rate)</p> <p><input type="button" value="Reserve"/> <input checked="" type="checkbox"/></p>		<p>Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$87.42*</p>				<p></p>		
<p><b>Compact Car</b> (Worldspan) </p> <p>\$16.81 per day (Corporate rate)</p> <p><input type="button" value="Reserve"/> <input checked="" type="checkbox"/></p>		<p>Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$90.83*</p>				<p></p>		

### Step 3: Select a Hotel

How to...		Additional Information	
1.	If you selected the <b>Find a Hotel</b> option on the <b>Flight</b> tab, the hotel results appear after you choose your rental car.	You can sort the list of hotels by <b>Preference, Price, Rating, Distance</b> and <b>Policy</b> .	
2.	To filter by hotel chain, , enter the chain name in the <b>With names containing</b> box next to the <b>Sorted by</b> box	Depending on your company's configuration, you might be prompted to provide the hotel information if you are booking a roundtrip overnight stay without a hotel.	
3.	Use the filter options to narrow your search by <b>Amenity</b> or <b>Chain</b> .	To filter by multiple chains, in the <b>Hotel chain</b> box on right, click <b>hide all</b> and then select only the chains you want displayed.	
4.	To filter by neighborhood, select the desired neighborhoods in the <b>Neighborhood</b> box on the right.	A map of hotels appears at the top of the page. Your company's preferred hotels are indicated with pink dots.	



## Section 4: Make a Travel Reservation

### Step 3: Select a Hotel (continued))

#### How to...

5. Click the **more info** link for a specific hotel to find more detailed information for the hotel.
6. Click **choose room** to view room rates.
7. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Reserve**.
8. Review the information on the **Rate details/Cancellation policy** pop-up window, click to agree, and then click **Continue**.

#### Additional Information

The **Reserve** buttons are color coded as follows:

- A *green* **Reserve** button indicates the hotel rate is within policy.
- A *yellow* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information.
- A *red* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved.

You will see a notification if a hotel is outside of policy. You can view the type of rate and room, as well as other information that is available.

A *grey* or *yellow* diamond indicates that the hotel property is company preferred.

After clicking the **Reserve** button, the hotel confirmation page appears.



## Section 4: Make a Travel Reservation

### Step 3: Select a Hotel (continued)

How to...

Additional Information

The screenshot displays a hotel search interface. At the top, it shows the check-in date as Monday, Oct 18, and the check-out date as Tuesday, Oct 19. A map of the Grapevine, Texas area is shown with several hotel locations marked with numbered pins (1-10). Below the map, there are search filters and sorting options. The results list shows two hotels:

Hotel Name	Distance	Price
Embassy Suites Dallas - DFW Airport North ...	2.24 miles	\$209
Sleep Inn DFW North	1.94 miles	\$48

Additional details for the first hotel include the address 2401 Bass Pro Drive, Grapevine, Texas 76051, a 4.5-star rating, and a price of \$379. The second hotel has an address of 4770 Plaza Drive, Irving, Texas 75063, a 3.5-star rating, and a price of \$82.

### Step 4: Complete the Reservation

How to...

Additional Information

1. Review the details of the reservation, and then click **Next**.
2. On the *Trip Booking Information* page, enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click **Next**.
4. On the *Trip Confirmation* page, click **Purchase Ticket** if you are satisfied with your reservation.
5. The **Finished** page opens. The record locator number and the Finished message appear on this page.
6. Click on **Return to Travel Center**.

From here, you can add or make changes to the car, hotel as well as change the dates of the flight.

The trip name and description data are for your record keeping. If you have any special requests for the travel agent, please enter them into the agent comments section. Some request may result in higher fees.

The *Trip Confirmation* page opens.

To make any changes, click on **Previous** and make your changes

The *Finished* page opens.

You are done.

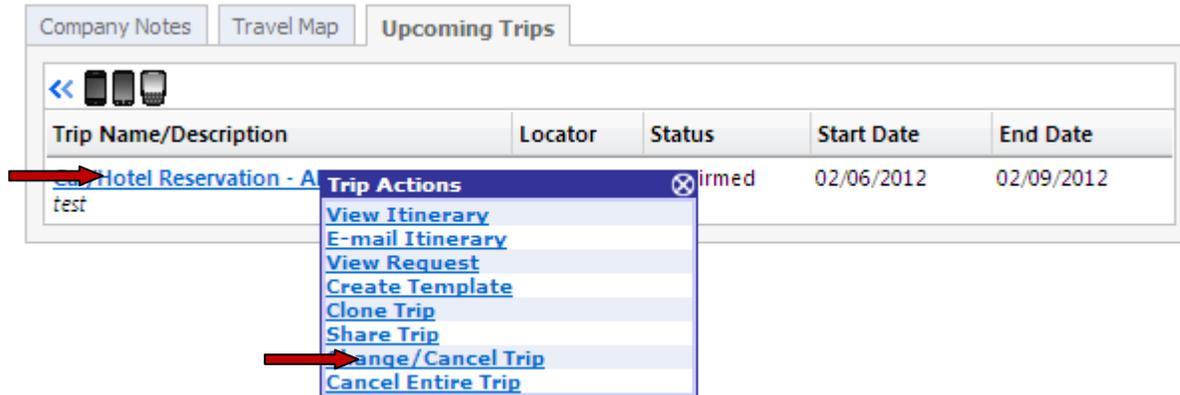


## Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

### *Change a Reservation*

How to...

Additional Information



1. From **Upcoming Trips** on the *My Concur* page, click on the trip you want to change.
2. Click **Change Trip**.
3. On the **Itinerary** page, select the portion of the trip you want to change.

The **Trip Actions** menu appears.

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

Directly contact the appropriate Website, or vendor if you did NOT book your trip using the GA Travel & Expense System.

From the **Itinerary** page, follow the prompts to:

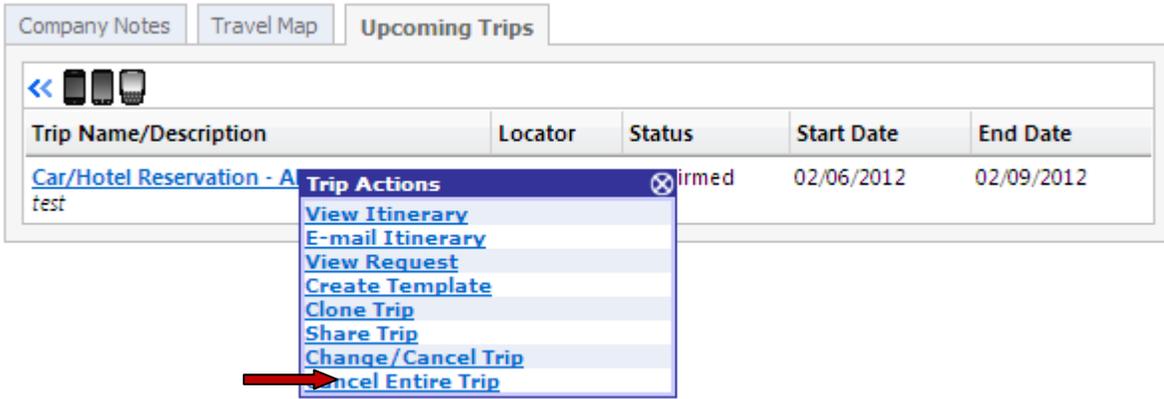
- Email your itinerary
- Change seat
- Change the flight day or time for travel (you cannot change the airline)
- Add, change, or cancel car rental
- Add, change, or cancel hotel



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

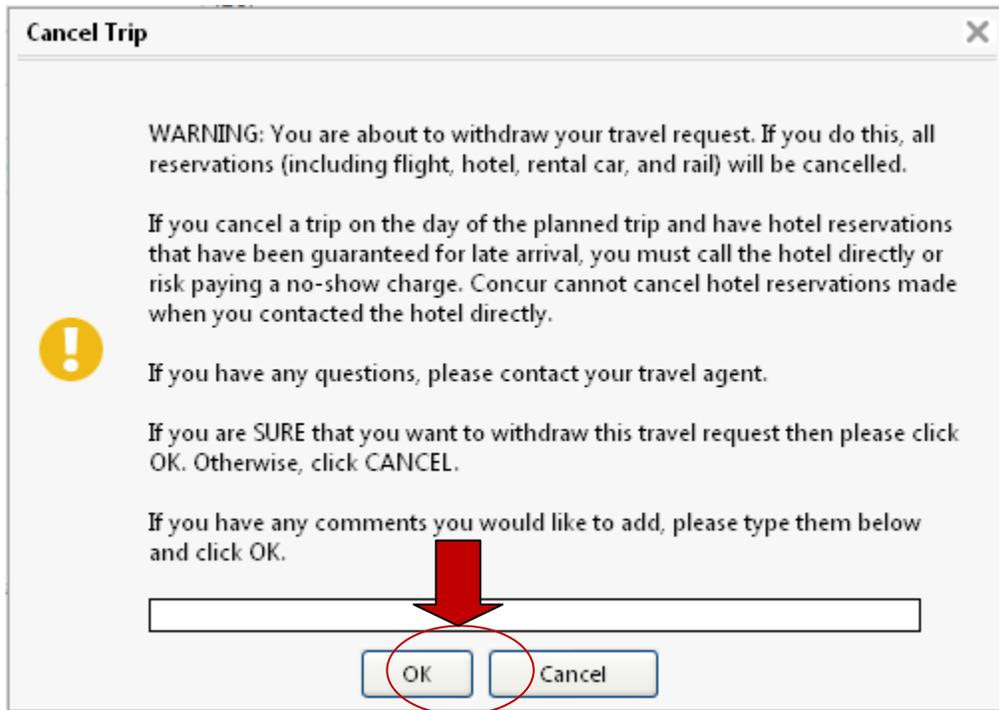
### *Cancel an Entire Reservation*

<b>How to...</b>	<b>Additional Information</b>
------------------	-------------------------------



1. From **Upcoming Trips** on the *My Concur* page, click on the trip you want to cancel.
2. Click **Cancel Entire Trip**.
3. Click **OK**.

Cancellation numbers are stored with the cancelled trip information in the **Trip Library**. **Cancel Trip** dialogue box opens.



A **Rate details/Cancellation policy** dialogue box may open. Read the information presented.



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

### Cancel an Entire Reservation (continued)

How to...

Additional Information

Rate details / Cancellation policy

Econo Lodge **EconoLodge**

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

Hotel Rates  
51.29 USD STARTING 06FEB FOR 3 NIGHTS

1 KING BED NO SMOKING  
FREE HIGH-SPEED WIRELESS PARKING AREA VIEW  
VIP  
RULES EXCLUDES 12 PCT TAX EXCLUDES GRATUITY  
RESERVATION WILL BE HELD TILL 6PM LOCAL TIME  
CC ACCEPTED AM AX BV CB DC DS JC MC PI VI  
CANCEL  
CANCEL BY 6 PM LOCAL HTL TIME DOA  
EXTRA ADULT 0.00 USD

I agree to the hotel's rate rules, restrictions, and/or cancellation policy.

Continue Cancel

4. Select the checkbox next to indicate agreement with the vendor's cancellation policy if presented.

Cancellation numbers are stored with the cancelled trip information in the **Trip Library**.  
The **Continue** button becomes active.

Rate details / Cancellation policy

Econo Lodge **EconoLodge**

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

Hotel Rates  
51.29 USD STARTING 06FEB FOR 3 NIGHTS

1 KING BED NO SMOKING  
FREE HIGH-SPEED WIRELESS PARKING AREA VIEW  
VIP  
RULES EXCLUDES 12 PCT TAX EXCLUDES GRATUITY  
RESERVATION WILL BE HELD TILL 6PM LOCAL TIME  
CC ACCEPTED AM AX BV CB DC DS JC MC PI VI  
CANCEL  
CANCEL BY 6 PM LOCAL HTL TIME DOA  
EXTRA ADULT 0.00 USD

I agree to the hotel's rate rules, restrictions, and/or cancellation policy.

Continue Cancel

5. Click on **Continue**.

The cancellation begins to process.



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

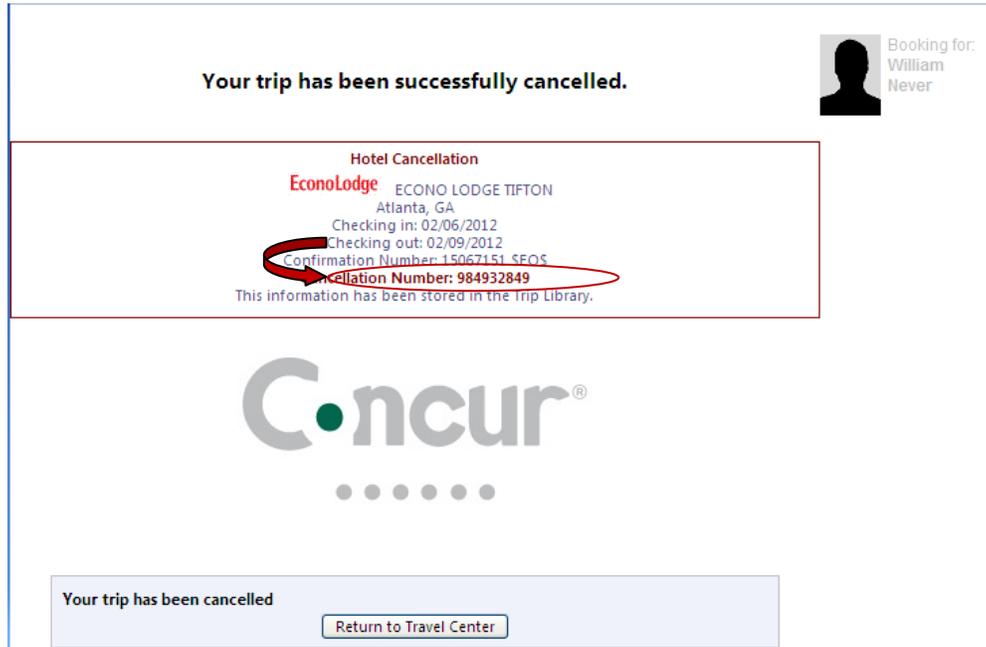
### *Cancel an Entire Reservation (continued)*

#### How to...

6. Click on **Continue**.

#### Additional Information

The cancellation begins to process.



7. Your trip has been cancelled. Click on **Return to Travel Center**.

Cancellation numbers are stored with the cancelled trip information in the **Trip Library**.

Cancellation numbers can be retrieved at any time.

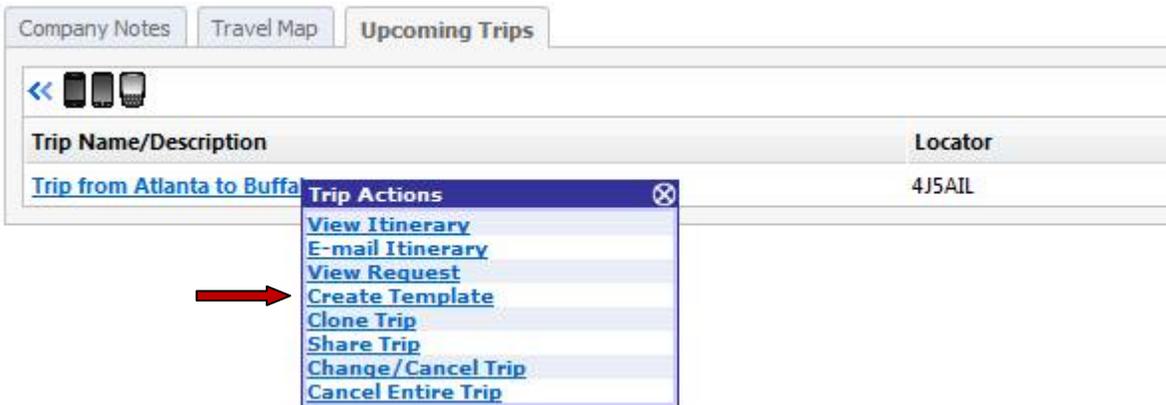


## Section 6: Trip Templates

If you make the same reservation frequently, create a trip template to save time. The next time you book the trip you will only have to change the dates and perhaps travel times. Templates are individual to the user.

### *Create a Template From an Upcoming Trip*

<b>How to...</b>	<b>Additional Information</b>
------------------	-------------------------------



- From **Upcoming Trips** on the *My Concur* page click on the trip you want to make a template from. The **Trip Actions** dropdown menu appears.
- Select **Create Template**.
- Click **OK**.

### *Make a Template Using the Templates Menu*

<b>How to...</b>	<b>Additional Information</b>
------------------	-------------------------------

- Click the **Travel** tab from the **My Concur** page. The **Travel** Menu opens.



- Click on **Templates**. The **Travel Templates** menu opens.
- Click on **+Add New Template**.



## Section 6: Trip Templates

### *Make a Template Using the Templates Menu (continued)*

How to...

Additional Information

My Concur | **Travel** | Expense | Reporting | Profile

Home | Trip Library | **Templates** | Policy | Profile | Tools

### Travel Templates

You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.

**Personal Travel Templates -- Donna S Fitzgerald** + Add New Template

Template Name▲	Created by	Description
No records found.		

**Company Travel Templates**

Template Name	Created by▲	Description
No records found.		

4. Enter a unique name in **Template Name**.
5. Enter a description of the template in **Description**.
6. Select one of the three options for creating a template.

- **Start from an empty template.** – You are starting from scratch.
- **Record Locator** – use the Record Locator number (stored in Trip Library) from a past trip with all the correct travel components.
  - Enter the Record Locator Number
- **Existing Trip Template** – use an existing Trip Template to build from.
  - Select the existing Trip Template from the dropdown menu.

Home | Trip Library | **Templates** | Policy | Profile | Tools

Template Name: (Please use a unique name)

Description:

**Start this trip template from:**

Start from an empty template

Record Locator:

Existing Trip Template: Choose a template

**Next** Cancel



## Section 6: Trip Templates

### *Make a Template Using the Templates Menu (continued)*

#### How to...

7. Click **Next**.
8. Enter a description of the template in **Description**.
9. Select one of the three options for creating a template.

#### Additional Information

- A. Start from an empty template. – You are starting from scratch.
- B. Record Locator – use the Record Locator number (stored in Trip Library) from a past trip including all the travel components.
  - o Enter the Record Locator Number
- C. Existing Trip Template – use an existing Trip Template to build from.
  - o Select the existing Trip Template from the dropdown menu.

10. **Blank Template:** Build the applicable template segments – Air, Car and or hotel – for each leg of the trip.

The screenshot shows a web-based form for creating a trip template. At the top right is a small icon of a clipboard with a pencil. The form has the following elements:

- Template Name:** A text input field containing "Trip to NYC". Above it is the label "Template Name (Please use a unique name)".
- Description:** A large text area for entering details.
- Refundable only air fares:** A checkbox that is currently unchecked.
- Action Buttons:** Four buttons: "Save", "Delete Template", "Book Template", and "View All Templates".
- Segment Adders:** Two identical rows of three buttons: "Add Air" (with an airplane icon), "Add Car" (with a car icon), and "Add Hotel" (with a hotel icon).

-OR-

**Record Locator or Existing Template:** The information from the specific trip or existing template will populate the fields. Edit as necessary.



## Section 6: Trip Templates

### *Make a Template Using the Templates Menu (continued)*

How to...

Additional Information

Template Name(Please use a unique name)  
Washington DC - House Meetings

Description:

Refundable only air fares

[Save](#) [Delete Template](#) [Book Template](#) [View All Templates](#)

**Hartsfield Intl Arpt (ATL) to Ronald Reagan National Arpt (DCA)**

**DELTA** Delta (DL) Flight Number 2238 Depart After 1:15 PM (Economy)  
[Edit Air](#) [Remove Air](#)

[Add Air](#) [Add Car](#) [Add Hotel](#)

**Car Rental at Washington, DC (DCA) 2 nights**

Picking up:	2:30 PM
Pick-up at:	Ronald Reagan National Arpt (DCA)
Returning:	11:30 AM
Returning to:	Ronald Reagan National Arpt (DCA)
Car Type:	Any Car Class CarBody, Automatic transmission Air conditioning

[Edit Car](#) [Remove Car](#)

**Ronald Reagan National Arpt (DCA) to Hartsfield Intl Arpt (ATL)**

**DELTA** Delta (DL) Flight Number 443 Depart After 1:00 PM (Economy)  
[Edit Air](#) [Remove Air](#)

[Add Air](#) [Add Car](#) [Add Hotel](#)

[Add Air](#) [Add Car](#) [Add Hotel](#)

Click **Save**.

The template is saved and can be accessed in Templates.



## Section 6: Trip Templates

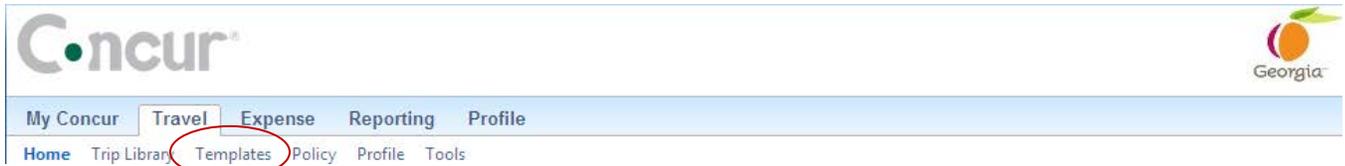
### *Book a Trip from a Template*

#### How to...

#### Additional Information

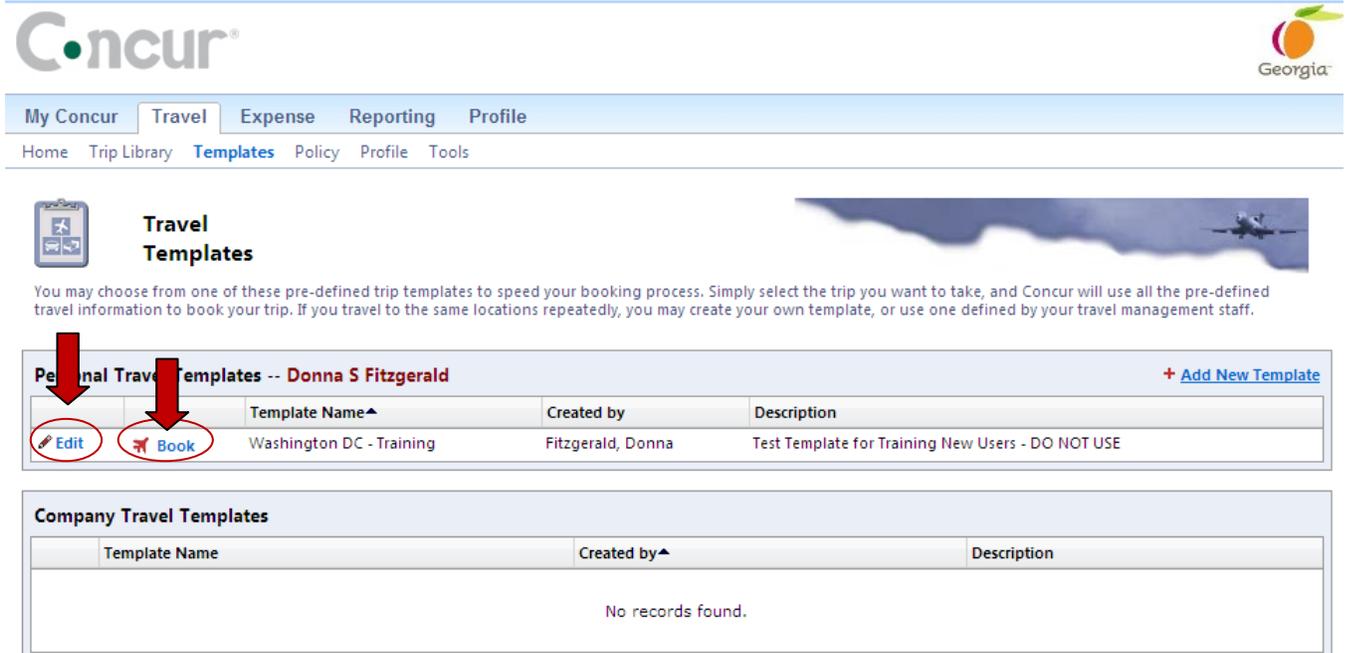
1. Click the **Travel** tab from the *My Concur* page.

The **Travel** Menu opens.



2. Click on **Templates**.

The **Travel Templates** menu opens.



3. Click on **Edit** to populate your dates for the trip and the components (segments, air, car or hotel).
4. Click on **Book** to make the reservations.
5. Follow the prompts until you complete the **Purchase Tickets** prompt, receive the **Finished** message and see the **Record Locator Number** for your trip.

Follow the prompts.



## Section 6: Trip Templates

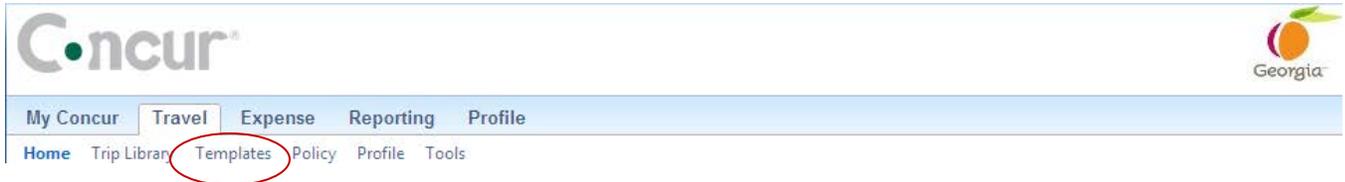
### Delete a Template

#### How to...

#### Additional Information

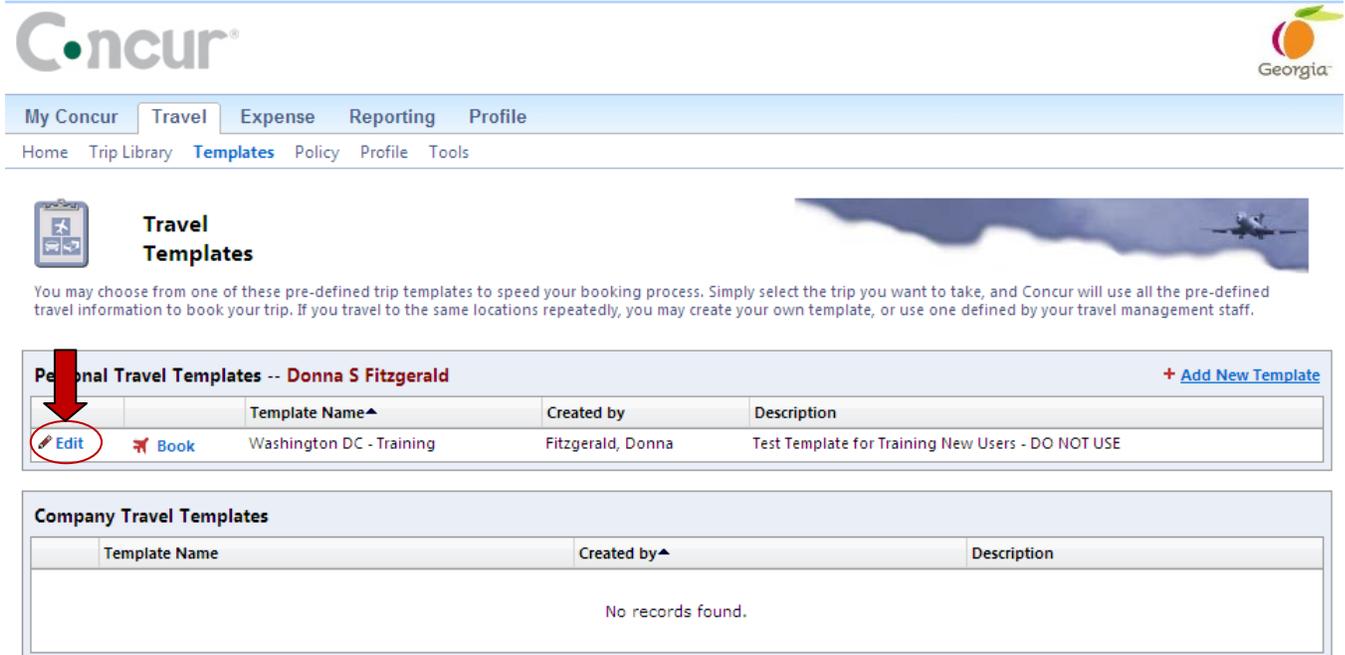
1. Click the **Travel** tab from the *My Concur* page.

The **Travel** Menu opens.



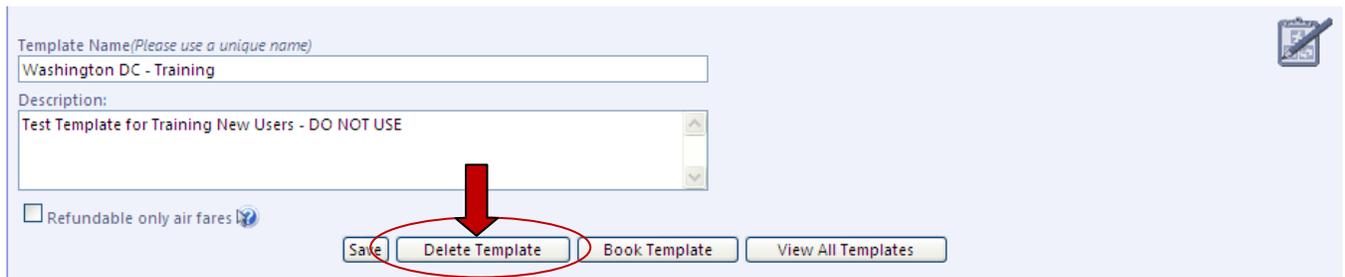
2. Click on **Templates**.

The **Travel Templates** menu opens.



3. Click on **Edit** for the Template you want to delete.

The Template opens



4. Click on **Delete Template**.

A confirmation window opens.

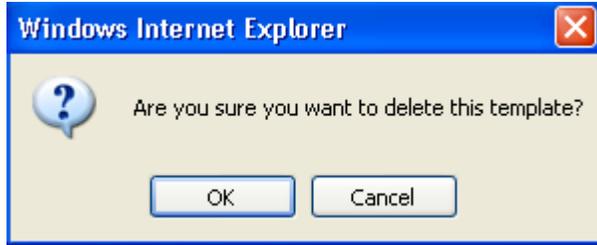


## Section 6: Trip Templates

### Delete a Template (continued)

How to...

Additional Information



5. Click on **OK**.

The template is deleted.

Home Trip Library **Templates** Policy Profile Tools



**Travel Templates**

You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.



**Personal Travel Templates -- Donna S Fitzgerald** [+ Add New Template](#)

Template Name▲	Created by	Description
No records found.		

**Company Travel Templates**

Template Name	Created by▲	Description
No records found.		

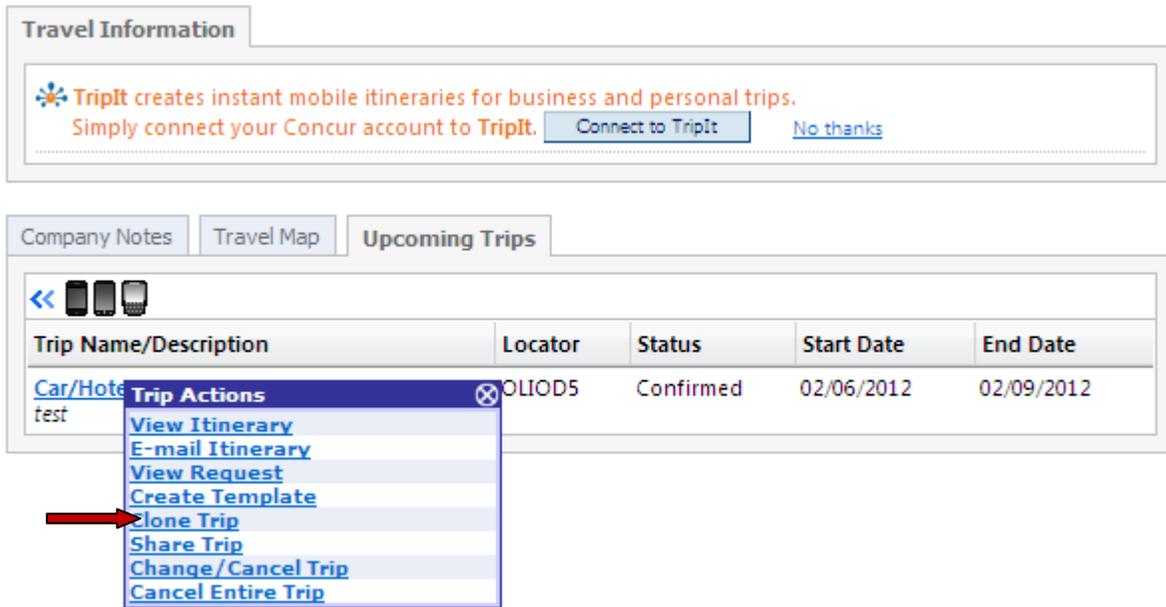


## Section 7: Clone a Trip

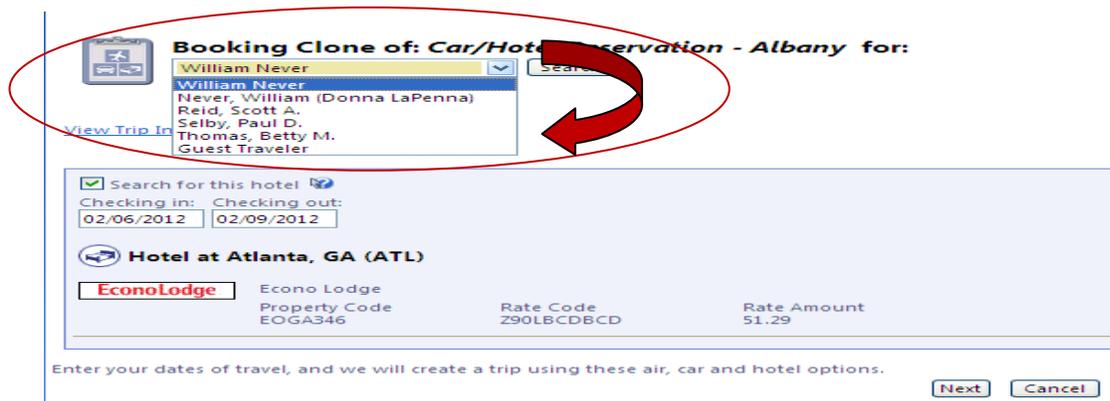
If you have to make the same reservation for a group of people, book the information for one traveler then use the clone feature to quickly and easily make the same reservation for other travelers you administer without having to re-enter locations, and search criteria. The trip you are cloning from **MUST** be an active upcoming trip in order to use the clone feature.

### *Create a Cloned Trip*

<b>How to...</b>	<b>Additional Information</b>
------------------	-------------------------------



1. From **Upcoming Trips** on the *My Concur* page click on the trip you want to clone. The Trip Actions box appears.
2. Select **Clone Trip**.
3. Select the person you are Travel Assistant for from the drop down list.



## Section 7: Clone a Trip

### Create a Cloned Trip (continued)

#### How to...

- Edit the check-in/check-out dates if necessary.
- Select **Next**.

#### Additional Information

**Booking Clone of: Car/Hotel Reservation - Albany for:**  
 Never, William (Donna LaPenna) Search

[View Trip Information](#)

Search for this hotel

Checking in: 02/06/2012    Checking out: 02/09/2012

**Hotel at Atlanta, GA (ATL)**

**EconoLodge** Econo Lodge

Property Code	Rate Code	Rate Amount
EOGA346	Z90LBCDBCD	51.29

Enter your dates of travel, and we will create a trip using these air, car and hotel options.

Next Cancel

- Click **Next** again.
- Follow the prompts through each segment of the reservations on the cloned trip. Our example is a hotel only reservation clone.

**Compare List**

1. Econo Lodge		0 miles	\$51
	1025 West 2nd St Tifton, GA 31794		\$57
		more info	remove
			choose room

- The hotel chosen in the original reservation will show in a yellow block in the **Compare List** area.
- Click on **Choose Room** and select the room type and rate.



## Section 7: Clone a Trip

### Create a Cloned Trip (continued)

#### How to...

- C. Click **Reserve**

#### Additional Information

The Trip Payment Information box may open.

### Trip Payment Information



Booking for:  
William  
Never

Choose a credit card [Add a New Credit Card](#)  
Company cards are indicated by an asterisk (\*).

TEST VI (...1111)

Please choose a credit card and billing information, if applicable.

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.

- D. Click **Reserve Hotel**.
- E. Follow the prompts for any other segments such as air or car reservations. When reservation segments are complete.



## Section 7: Clone a Trip

### Create a Cloned Trip (continued)

#### How to...

- Click **Next** at the bottom of the *Travel Details* page.

#### Additional Information

The *Trip Booking Information* page appears.

#### Trip Booking Information

Booking for:  
William  
Never

The trip name and description are for your record keeping convenience

##### Trip Name

This will appear in your calendar

Car/Hotel Reservation - 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

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

- Enter a trip description
- Click **Next** at the bottom of the *Trip Booking Information* page.
- Click **Confirm Booking** at the bottom of the *Trip Confirmation* page.

The *Trip Confirmation* page appears.

The *Finished* page appears which shows your record locator number and the details of the trip.

#### Finished!

Thanks for using Concur

Trip Record Locator : OLMBR6

This trip complies with your travel policy.

Your itinerary has been saved. Travel Incorporated (92I) will service your itinerary.

**Please Note:** Fares are not guaranteed until tickets are issued and are subject to change without notice.

#### Travel Contact Information

If you do not receive an e-mail confirmation of your itinerary within 24 hours please contact your travel manager.



Travel Incorporated (92I)



Car/Hotel Reservation - Atlanta

Feb 6 - Feb 9

Description: (No Description Available)

Trip Record Locator: OLMBR6 Created on: 1/4/2012 10:12:52 AM

Reservation for: William Never.

Monday, Feb 6, 2012

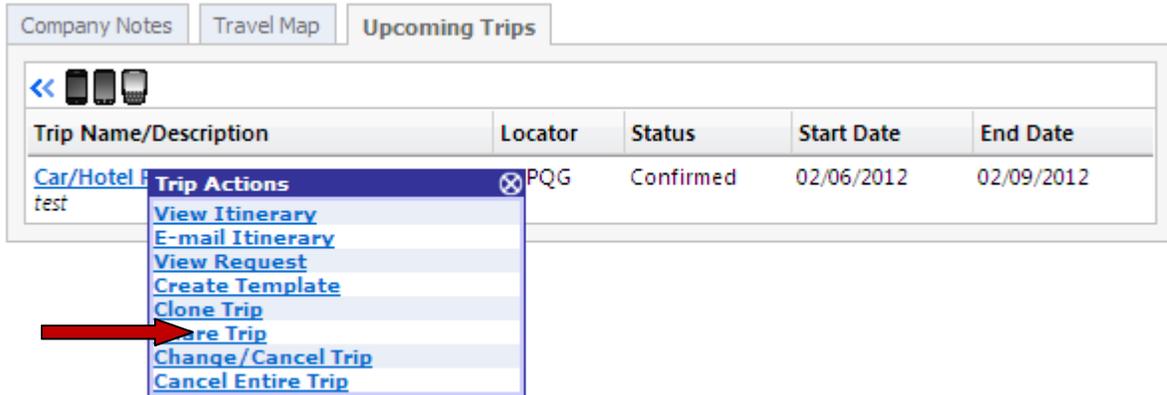


## Section 8: Share a Trip

If you make travel arrangements and you think there is someone you might like to share the information with so they can make reservations on their own, use the Share Trip feature.

### How to...

### Additional Information



1. From **Upcoming Trips** on the *My Concur* page click on the trip you want to share.
2. Select **Share Trip**.
3. From the dropdown list next to "Share this trip with:" select a person you administer for **OR** click on **Share** and type in the last name of the person you want to share the trip with.
4. Enter any comments in **Invitation Comments**.
5. Click **Share Trip**.

The **Trip Actions** dropdown menu appears.

**NOTE:** The list of matches displays results from all Agencies subscribed to the GTE system. However, the list displays full name and Agency.

Trip Name	Fare Quote	Locator	Start Date	End Date
Car/Hotel Reservation - Albany	USD0	4LIPQG	02/06/2012	02/09/2012



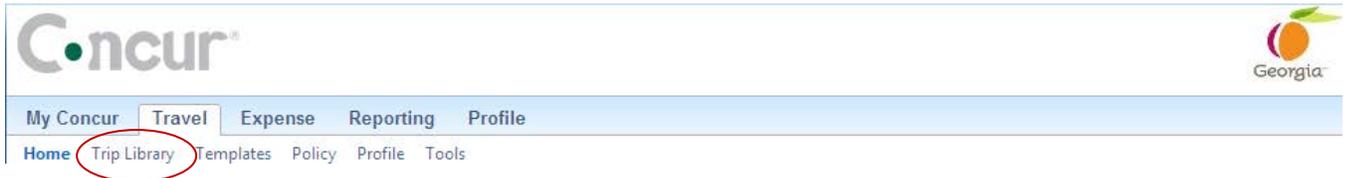
## Section 9: Trip Library

### How to...

### Additional Information

1. Click the **Travel** tab from the *My Concur* page.
2. Click on **Trip Library**.

The **Travel** Menu opens.  
The **Trip Library** opens.



4. Enter the date range of the trips you want to view.
5. Click in the box next to **Include Withdrawn Trips**.

Or you can enter a specific **Record Locator Number** in the **Search Value** field.

This allows you to view ALL entries made not just the ticketed ones.

7. Click on **Search**.

The information you requested will be returned.

Action	Trip Name/Description	Locator	Status	Start Date	End Date
Actions	Car/Hotel Reservation	NW6QH9	Confirmed	10/17/2011	10/19/2011
Actions	Car/Hotel Reservation	NWHS9	Confirmed	10/04/2011	10/05/2011
Actions	Car/Hotel Reservation	M223GY	Confirmed	09/19/2011	09/21/2011

8. Click on **Actions**.

The Trip Actions box for any specific trip will open. The actions available depend on the status of the trip. For example, Clone only appears if the trip has not begun.



## Section 9: Trip Library

### How to...

If you click on a cancelled/withdrawn trip instead of the Trip Actions box you will see the following:

### Additional Information

The Trip Library stores all the information about a trip including the original confirmation numbers AND any cancellation numbers.

**Travel Request Details**

Item Name:	Car/Hotel Reservation - Atlanta
Trip Description	No description
Submitted By:	William Never
Submitted on:	Wednesday, January 04, 2012 10:13 AM Eastern Time
Approval Status/History:	
History/Notes:	<p>Request Created on Wednesday, January 04, 2012 at 10:12 AM Eastern time by William Never.</p> <hr/> <p><b>Hotel segment Econo Lodge added on Wednesday, January 04, 2012 at 10:12 AM Eastern time.</b> No rules were broken.</p> <hr/> <p>Trip sent to travel agency for ticketing on Wednesday, January 04, 2012 at 10:19 AM Eastern time.</p> <hr/> <p>Trip Withdrawn on Wednesday, January 04, 2012 at 10:27 AM Eastern Time by: William Never Comments:</p> <div style="border: 1px solid red; padding: 5px;"> <p><b>Hotel Cancellation</b>  <b>EconoLodge</b> ECONO LODGE TIFTON                      Atlanta, GA                      Checking in: 02/06/2012                      Checking out: 02/09/2012                      Confirmation Number: 15069586 SEOS                      Cancellation Number: 984930414</p> </div>

