

TeamWorks Travel and Expense

Powered By Concur Technologies

TTE Travel: *Travel Assistant Handbook*



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Date	Notes / Comments / Changes
01/10/12	Document Release
11/12/13	Updated Branding from GTE to TTE, Header and Footers only

Welcome to TTE Travel & Expense

TeamWorks Travel & Expense powered by 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 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 TTE Travel & Expense

How to...

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

Additional Information

Your password is case sensitive.

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

You may even have access from your Agency intranet.

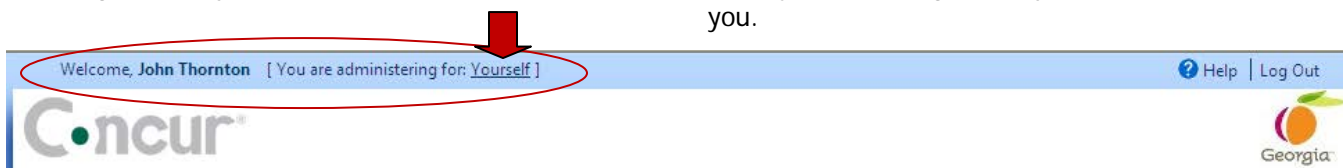
The screenshot shows the Concur login interface. At the top, there is a language selection bar with links for English (US), English (UK), Deutsch, Français, Français canadien, Español, Português (Brasil), Nederlands, Italiano, and Svenska. The main content area has a 'Welcome' message and a 'Notice' section. The notice states: 'If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below.' Below this, there is a French version of the notice: 'Si vous éprouvez des difficultés à ouvrir une session dans ce site, veuillez cliquer sur le lien [Vous avez oublié votre mot de passe?](#) ci-dessous.' The login form itself is on a light blue background. It includes a 'Login' header, a 'User Name' field, a 'Password' field, and a checkbox labeled 'Remember user name on this computer'. A 'Login' button is located below the password field. At the bottom of the login area, there are links for '[Forgot your user name?](#)' and '[Forgot your password?](#)', followed by the text 'Passwords are case sensitive.' Below the login form, there is a promotional banner for Concur's mobile solution, featuring an image of a hand holding a smartphone and the text: 'Make your life easier with Concur's mobile solution. This is what smartphones were made for. [Click here to learn more.](#)'

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.

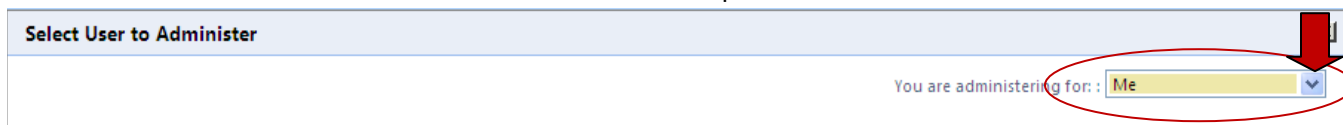


Additional Information

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

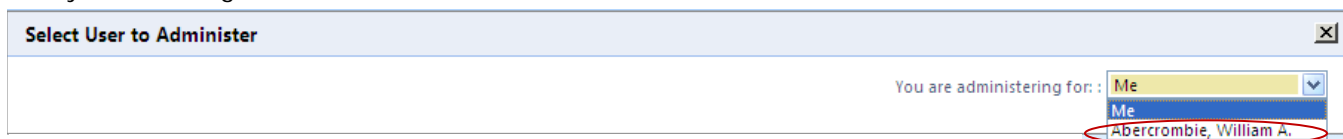
2. Click on Yourself.

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

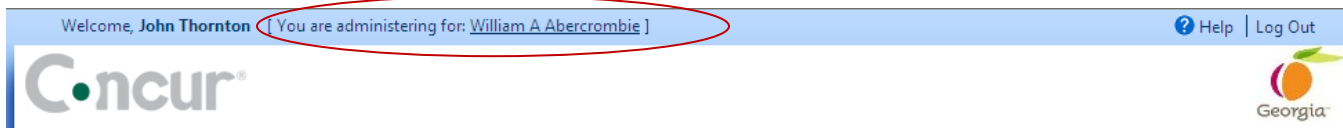


3. Click on dropdown box to display a list of users you are acting as a Travel Assistant for.

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.

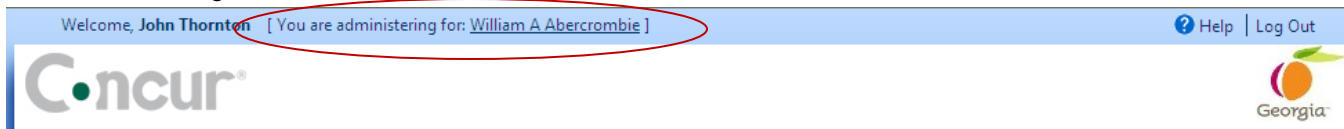
All the actions you take now are on behalf of this user.

Section 3: Logout as Travel Assistant for another User.

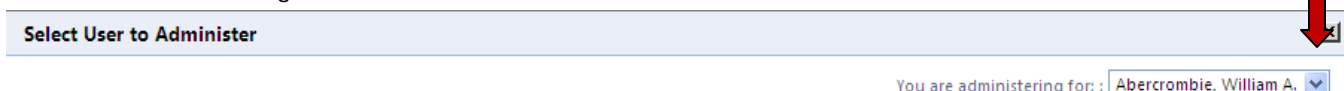
How to...

Additional Information

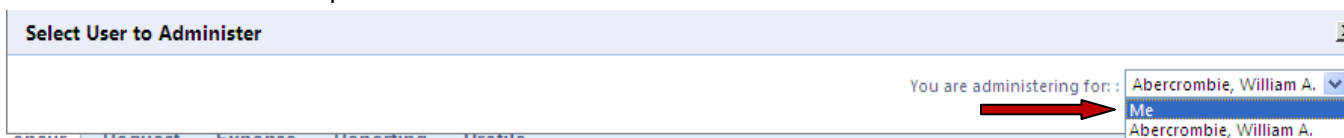
1. Click on the name appearing after "You are administering for:"



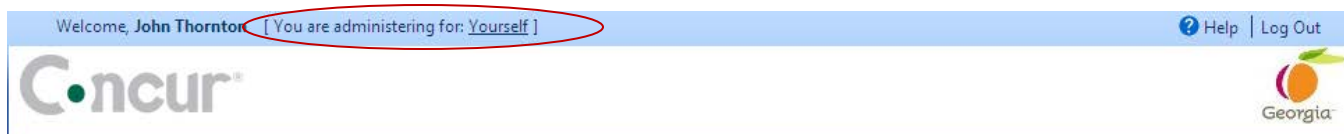
2. Click on the down arrow in the **Select User to Administer** dialogue box.



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...

1. Go to Trip Search on the *My Concur* page.
2. On the **Flight** tab, select one of these:
 - Round Trip
 - One Way
 - Multi-Segment
3. 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



Trip Search




Flight | Car | Hotel | Flight Status




WARNING-Holding multiple reservations for same routing or times or making multiple airline changes is considered an illegal booking practice by the airlines. This can result in additional fees billed to your credit card at a later date.

☒ Round Trip ☐ One Way ☐ Multi-Segment

Departure City  ATL
ATL - Hartsfield Intl Arpt - Atlanta, GA  [Select nearby airports](#)


Arrival City 
 [Select nearby airports](#)



Departure
 depart  9:00am  ± 3 

Return
 depart  5:00pm  ± 3 

☐ Pick-up/Drop-off car at airport
☐ Automatically reserve this car

☐ Find a Hotel

☐ Specify airline  ☐ Refundable only air fares

Class of service: Economy class  

Search flights by: ☒ Price ☐ Schedule

Flights w/ no double connections: ☒

4. In the **Departure** and **Return** fields, select the preferred travel dates and times.
5. If you need a car, select **Pick-up/Drop-off car at airport**.
6. If you need a hotel, select **Find a Hotel**. Select search parameters.
7. 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**.

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.

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.

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.

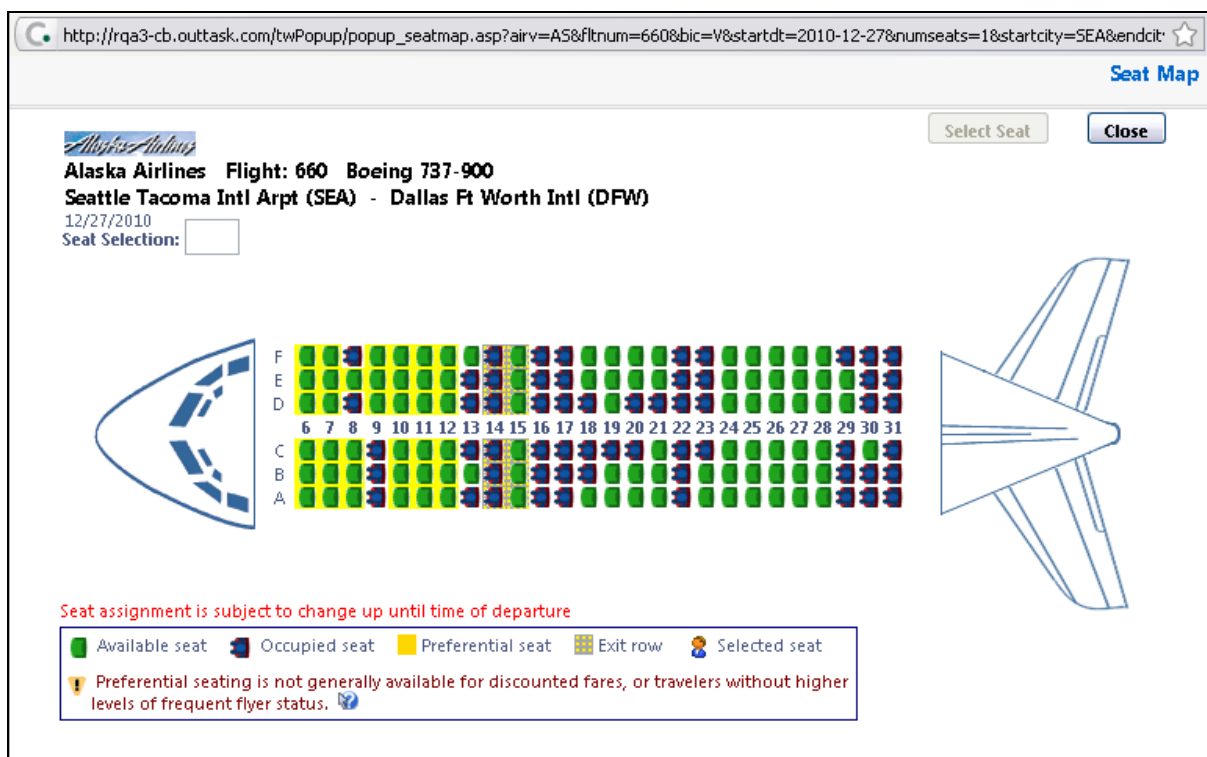
Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.

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 [Print / E-mail](#)

[Baggage Fee Policies](#) [Hide matrix](#)

All 88 results	United	Alaska Airlines	American	Multiple Carriers	Frontier	Airtran Air	US Airways
Nonstop 4 results	--	--	317.40 4 results	--	--	--	--
1 stop 84 results	446.56 22 results	364.10 22 results	328.10 17 results	317.60 15 results	318.80 6 results	361.80 1 results	586.80 1 results

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

Displaying: 88 out of 88 results. <<Previous | Page: 1 of 9 | Next>> | All

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

compare | more like this + | show details

Change Flight Search

Outbound

Depart: 6:00 AM - 12:00 PM

Arrive: 12:00 PM - 10:14 PM

Return

Depart: 2:00 PM - 7:25 PM

Arrive: 6:25 PM - 12:45 AM

Price

Choose currency: USD \$

Price: \$317.40 - \$608.02

Display Settings

☐ Hide Non-refundable Fares

Step 2: Select a Car

How to...

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**.

Additional Information

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>Print / E-mail</p> <p>Hide matrix</p>																											
<table border="1"> <thead> <tr> <th>All 23 results</th> <th>Economy Car</th> <th>Compact Car</th> <th>Intermediate Car</th> <th>Standard Car</th> <th>Full-size Car</th> <th>Premium Car</th> <th>Intermediate SUV</th> </tr> </thead> <tbody> <tr> <td></td> <td>8.47</td> <td>8.47</td> <td>9.14</td> <td>10.65</td> <td>11.32</td> <td>27.13</td> <td>27.15</td> </tr> <tr> <td></td> <td>15.92</td> <td>16.81</td> <td>17.81</td> <td>18.47</td> <td>19.56</td> <td>52.31</td> <td>52.56</td> </tr> </tbody> </table>				All 23 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Intermediate SUV		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
All 23 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Intermediate SUV																				
	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. Previous 1 2 3 Next All</p> <p>Sorted By: Policy - Most Compliant</p>																											
<table border="1"> <tbody> <tr> <td> Economy Car (Worldspan) ♦♦ \$15.92 per day (Corporate rate) Reserve ✓ </td> <td> Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$87.42* </td> <td></td> </tr> <tr> <td> Compact Car (Worldspan) ♦♦ \$16.81 per day (Corporate rate) Reserve ✓ </td> <td> Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$90.83* </td> <td></td> </tr> </tbody> </table>				Economy Car (Worldspan) ♦♦ \$15.92 per day (Corporate rate) Reserve ✓	Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$87.42*		Compact Car (Worldspan) ♦♦ \$16.81 per day (Corporate rate) Reserve ✓	Unlimited miles Pick-up: Terminal: DFW Automatic transmission Total cost \$90.83*																			
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Car booking options

☐ Ski rack

Message to Vendor:

Use the following Car Program: [Add car Mileage Program](#)

Change Car Search

Car Display Filters

Choose currency: [USD \\$](#)

☐ Unlimited miles

☐ Air conditioning

☐ Hybrid

Car Transmission

☐ Automatic

☐ Manual

Step 3: Select a Hotel

How to...		Additional Information	
<ol style="list-style-type: none"> If you selected the Find a Hotel option on the Flight tab, the hotel results appear after you choose your rental car. To filter by hotel chain, , enter the chain name in the With names containing box next to the 		<p>You can sort the list of hotels by Preference, Price, Rating, Distance and Policy.</p> <p>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.</p> <p>To filter by multiple chains, in the Hotel chain box on right, click hide all and then select only the</p>	

Sorted by box

3. Use the filter options to narrow your search by **Amenity** or **Chain**.
4. To filter by neighborhood, select the desired neighborhoods in the **Neighborhood** box on the right.

chains you want displayed.

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 web interface for hotel selection. At the top, it shows the check-in and check-out dates: "Check-in Mon, Oct 18 - Check-out Tue, Oct 19". Below this is a map of the Dallas/Fort Worth area, with several numbered markers (1-10) indicating hotel locations. To the right of the map is a "Hotel Preferences" section with dropdown menus for "Room Type" and "Smoking Preference", both set to "Don't Care". There are checkboxes for "Foam pillows", "Rollaway bed", and "Crib". A text field for "Other Hotel Preferences" is also present. Below the map, there is a search filter section with "Sorted By: Preference" and a text field for "With names containing:". The main list of hotels shows two results: "Embassy Suites Dallas - DFW Airport North ..." and "Sleep Inn DFW North". Each result includes a small image, the hotel name, address, distance, star rating, and price. The "Embassy Suites" result shows a price of \$209 and \$379, while the "Sleep Inn" result shows \$48 and \$82. Navigation links like "more info", "compare", and "view rates" are provided for each hotel.

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.

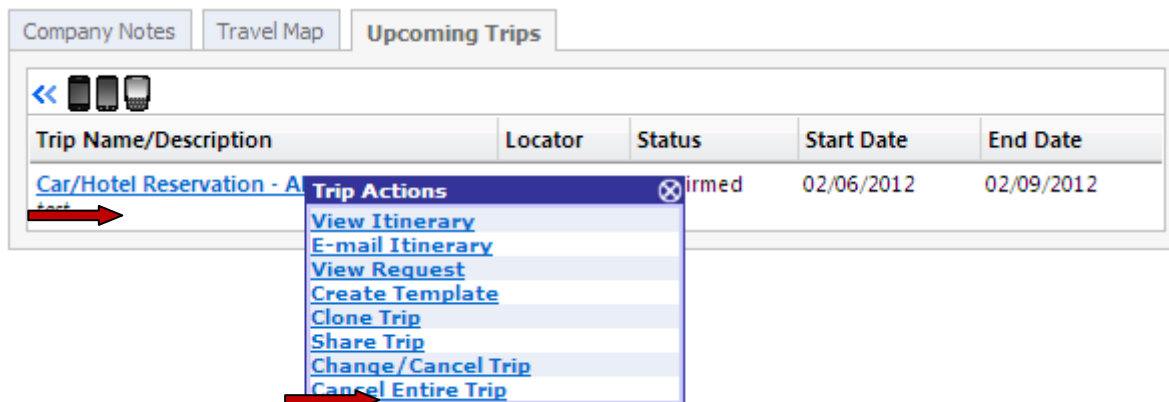
You are done.

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**.

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 TTE Travel & Expense System.

3. On the **Itinerary** page, select the portion of the trip you want to change.

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

How to...

Additional Information

Company Notes

Travel Map

Upcoming Trips

<< < > >>

Trip Name/Description	Locator	Status	Start Date	End Date
Car/Hotel Reservation - A test		Confirmed	02/06/2012	02/09/2012

Trip Actions

[View Itinerary](#)
[E-mail Itinerary](#)
[View Request](#)
[Create Template](#)
[Clone Trip](#)
[Share Trip](#)
[Change/Cancel Trip](#)
[Cancel Entire Trip](#)

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.

Cancel Trip

!

WARNING: You are about to withdraw your travel request. If you do this, all reservations (including flight, hotel, rental car, and rail) will be cancelled.

If you cancel a trip on the day of the planned trip and have hotel reservations that have been guaranteed for late arrival, you must call the hotel directly or risk paying a no-show charge. Concur cannot cancel hotel reservations made when you contacted the hotel directly.

If you have any questions, please contact your travel agent.

If you are SURE that you want to withdraw this travel request then please click OK. Otherwise, click CANCEL.

If you have any comments you would like to add, please type them below and click OK.

OK

Cancel

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 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 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

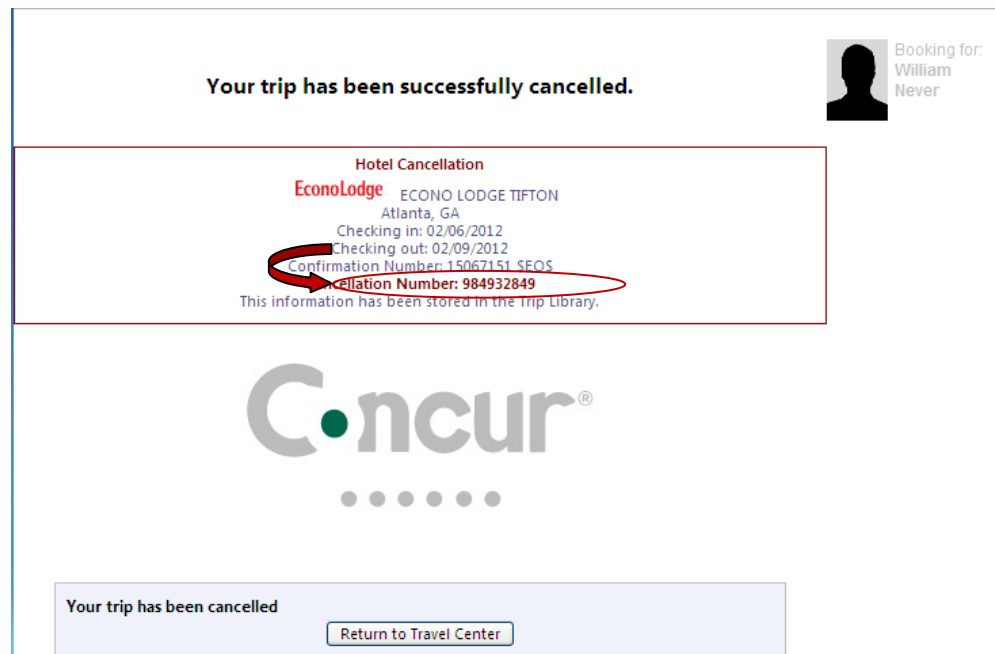
Cancel an Entire Reservation (continued)

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.

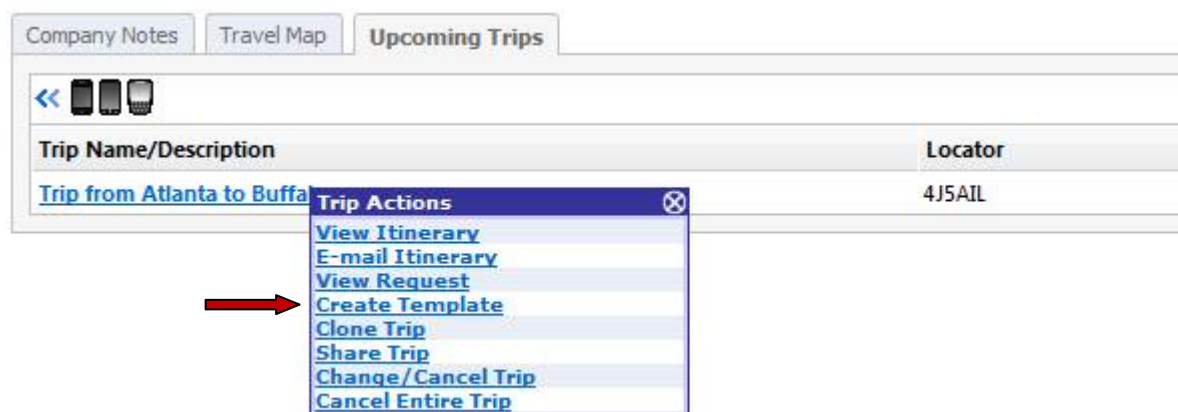
Section 6: Trip Templates

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

How to...

Additional Information



1. From **Upcoming Trips** on the *My Concur* page click on the trip you want to make a template from.
2. Select **Create Template**.
3. Click **OK**.

The **Trip Actions** dropdown menu appears.

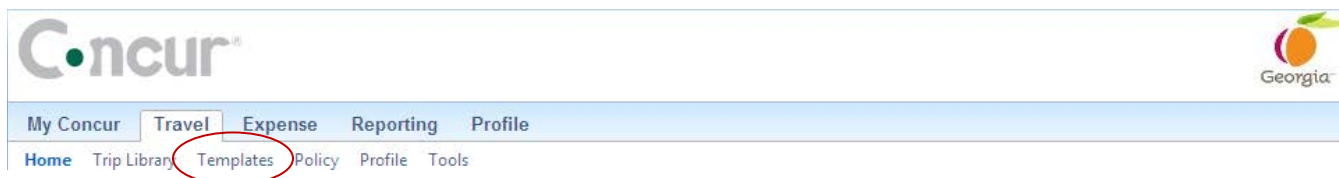
Make a Template Using the Templates Menu

How to...

Additional Information

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

The **Travel** Menu opens.



2. Click on **Templates**.
3. Click on **+Add New Template**.

The **Travel Templates** menu opens.

Section 6: Trip Templates

Make a Template Using the Templates Menu (continued)

How to...

Additional Information

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.

Section 6: Trip Templates

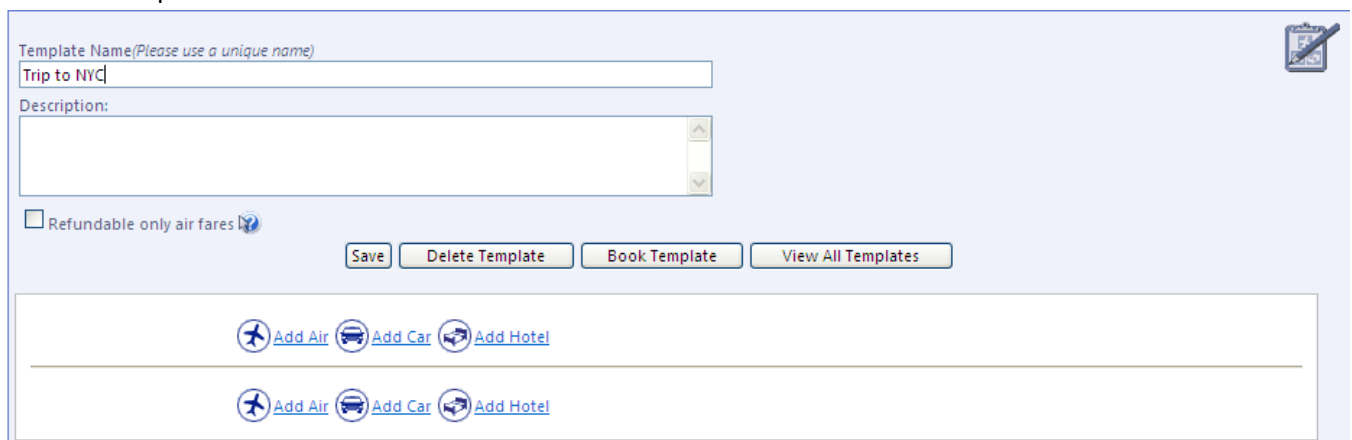
Make a Template Using the Templates Menu (continued)

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

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.



The screenshot shows a web-based form for creating a trip template. At the top, there is a text input field for 'Template Name (Please use a unique name)' with the value 'Trip to NYC'. Below it is a larger text area for 'Description:'. A checkbox labeled 'Refundable only air fares' is present. To the right of the description field is a small icon of a notepad with a pencil. Below the checkbox are four buttons: 'Save', 'Delete Template', 'Book Template', and 'View All Templates'. At the bottom, there are two identical rows of icons and links: an airplane icon with 'Add Air', a car icon with 'Add Car', and a hotel icon with 'Add Hotel'.

-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 (DL) Flight Number 2298 Depart After 1:15 PM (Economy)
[Edit Air](#) [Remove Air](#)

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

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

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

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

Click **Save**.

The template is saved and can be accessed in Templates.

Section 6: Trip Templates

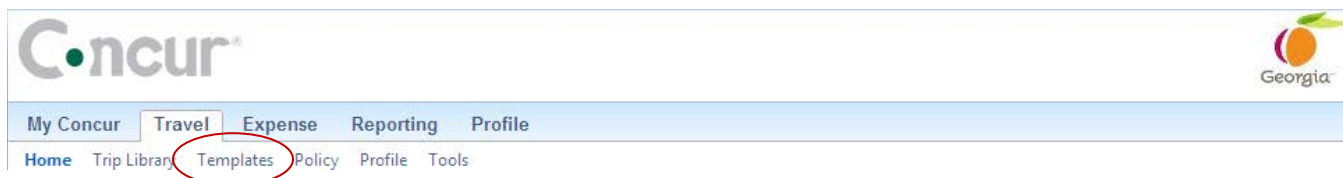
Book a Trip from a Template

How to...

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

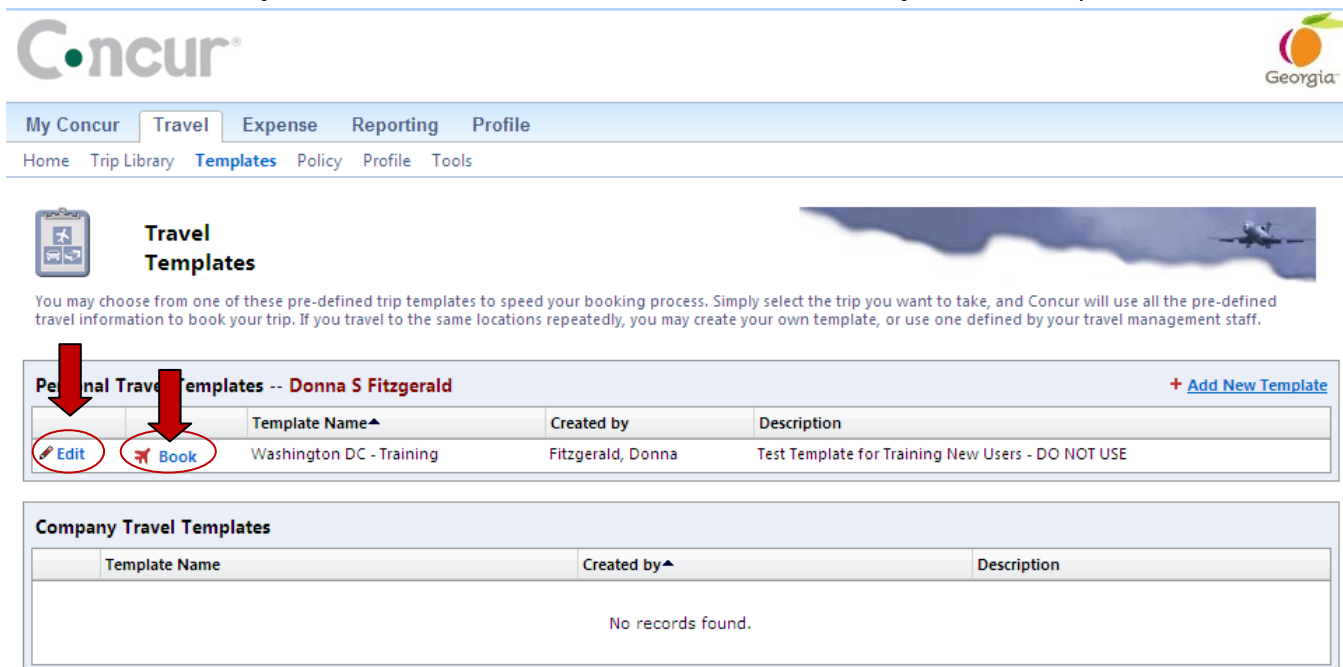
Additional Information

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

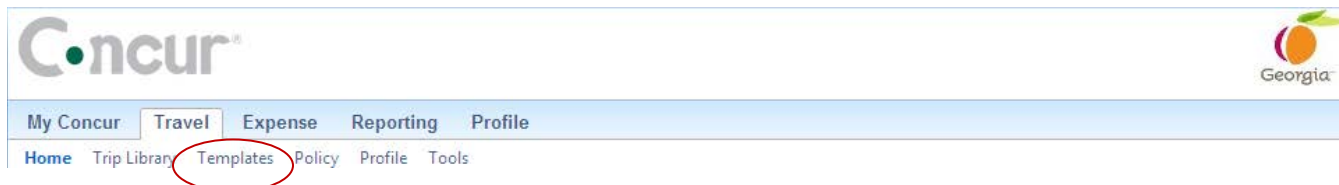
Delete a Template

How to...

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

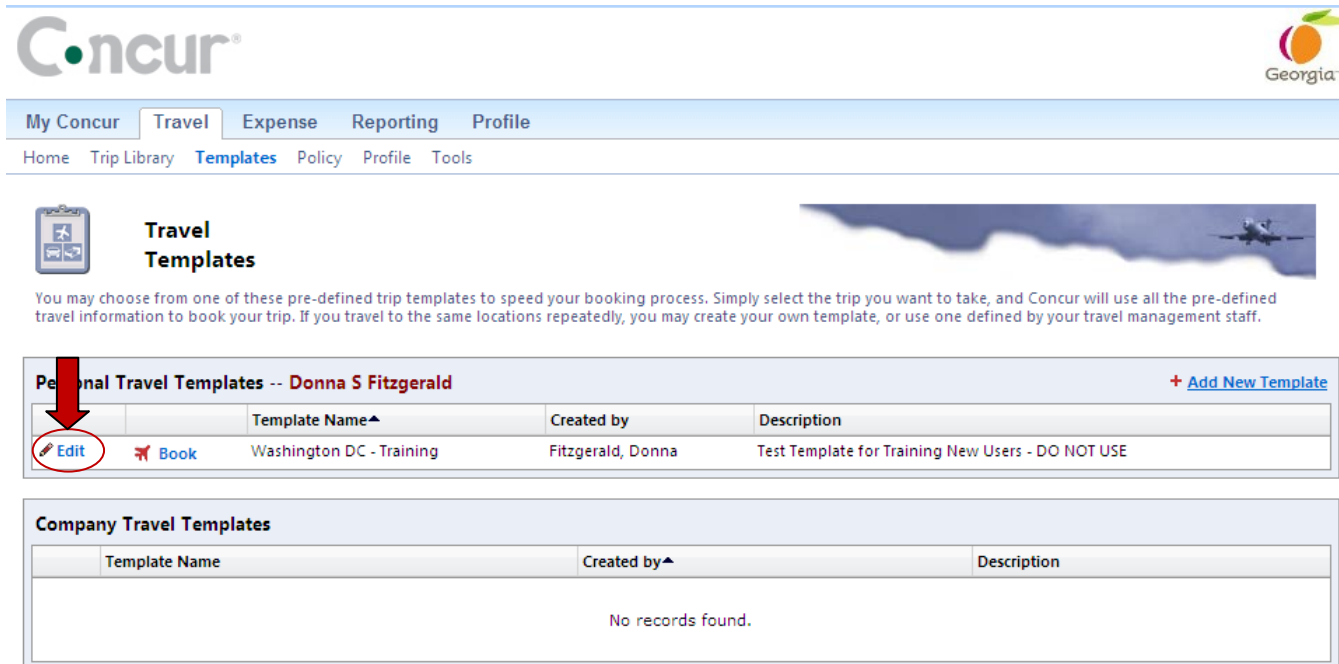
Additional Information

The **Travel** Menu opens.



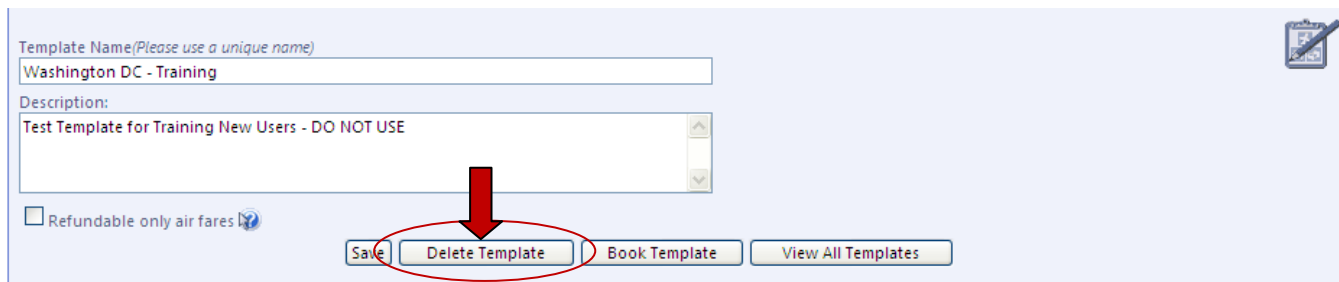
2. Click on **Templates**.

The **Travel Templates** menu opens.



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

The Template opens



4. Click on **Delete Template**.

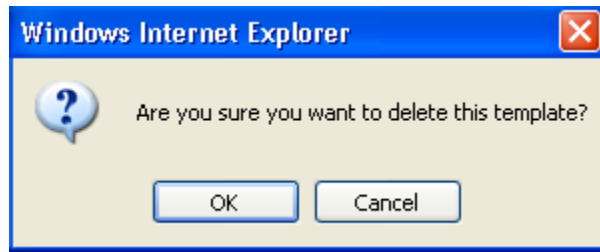
A confirmation window opens.

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

How to...

Additional Information

Travel Information

TripIt creates instant mobile itineraries for business and personal trips. Simply connect your Concur account to TripIt. [Connect to TripIt](#) [No thanks](#)

Company Notes **Travel Map** **Upcoming Trips**

Trip Name/Description	Locator	Status	Start Date	End Date
Car/Hotel test	OLI0D5	Confirmed	02/06/2012	02/09/2012

Trip Actions

- View Itinerary
- E-mail Itinerary
- View Request
- Create Template
- Clone Trip**
- Share Trip
- Change/Cancel Trip
- Cancel Entire Trip

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

The Trip Actions box appears.

Booking Clone of: Car/Hotel Reservation - Albany for:

William Never
Never, William (Donna LaPenna)
Reid, Scott A.
Selby, Paul D.
Thomas, Betty M.
Guest Traveler

☒ Search for this hotel

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

Hotel at Atlanta, GA (ATL)

EconoLodge Econo Lodge
Property Code EOGA346
Rate Code Z90LBCDBCD
Rate Amount 51.29

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

[Next](#) [Cancel](#)

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: EOGA346 Rate Code: Z90BCDBCD Rate Amount: 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	
	1025 West 2nd St Tifton, GA 31794		\$51 \$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)



Edit This Card

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

Start Over

<< Previous

Reserve Hotel

D. Click **Reserve Hotel**.

E. Follow the prompts for any other segments such as air or car reservations. When reservation segments are complete.

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.

Next >>

Cancel

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

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

Description: (No Description Available)

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

Reservation for: William Never.

Feb 6 - Feb 9

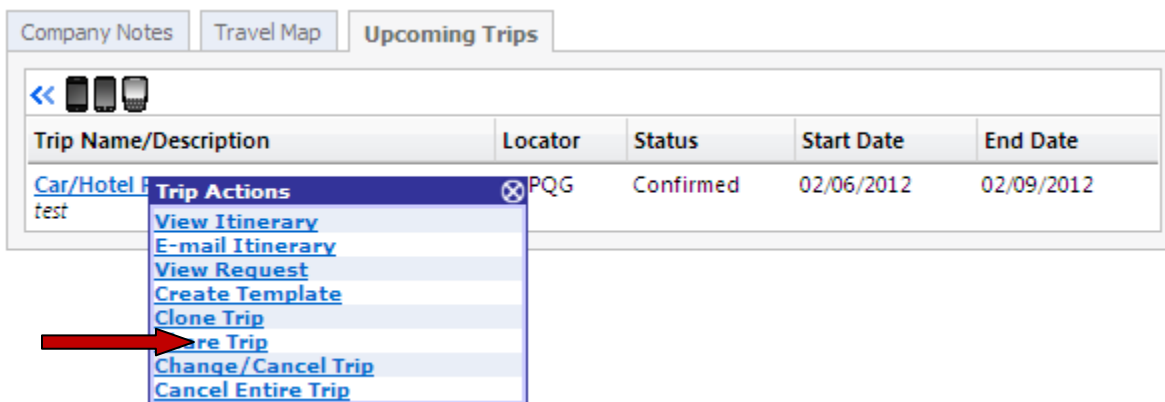
Monday, Feb 6, 2012

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

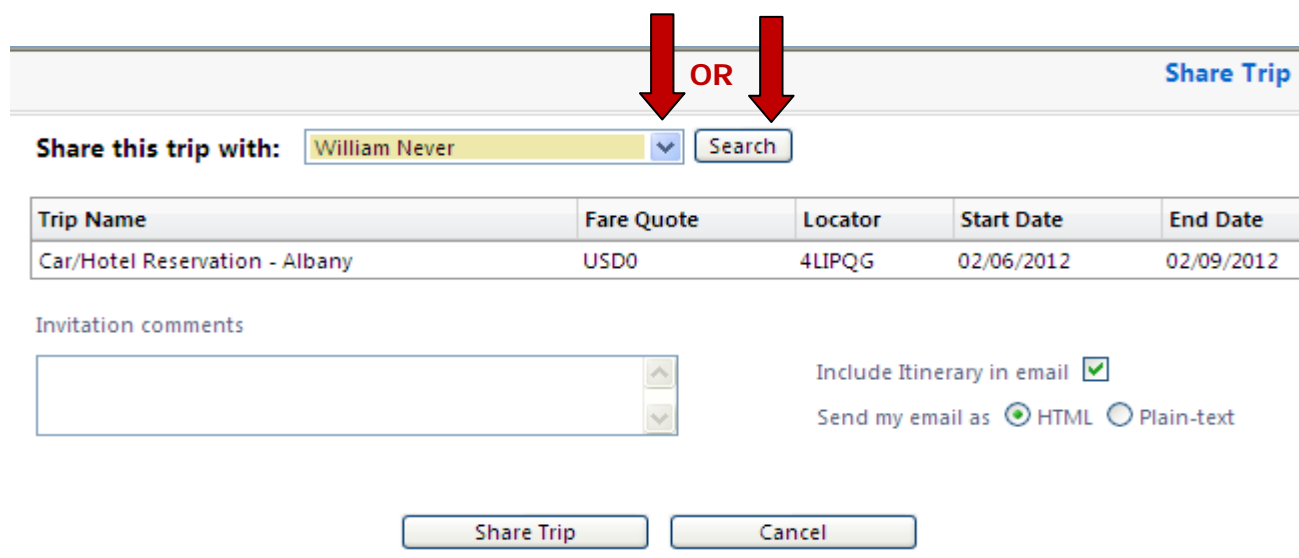


Trip Name/Description	Locator	Status	Start Date	End Date
Car/Hotel Reservation - Albany	4LIPQG	Confirmed	02/06/2012	02/09/2012

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

Invitation comments

Include Itinerary in email ☒

Send my email as ☒ HTML ☐ Plain-text

Share Trip **Cancel**

Section 9: Trip Library

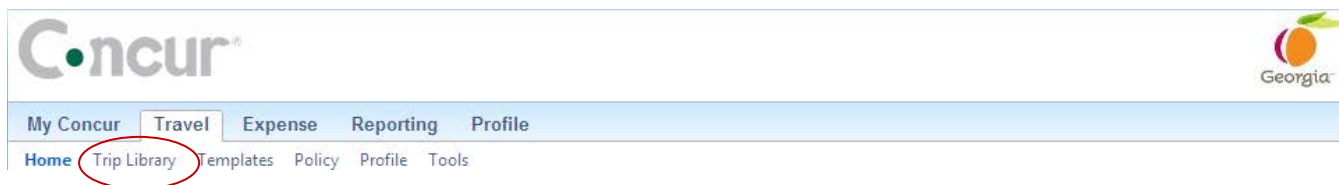
How to...

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

Additional Information

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.

Search value: [] Start Date: 07/04/2011 End Date: 01/04/2012 ☐ Include withdrawn trips [Search]

No trips meet your search criteria.

7. Click on **Search**.

The information you requested will be returned.

Search value

Start Date

End Date

07/04/2011

01/04/2012

☐ Include withdrawn trips

Search

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...

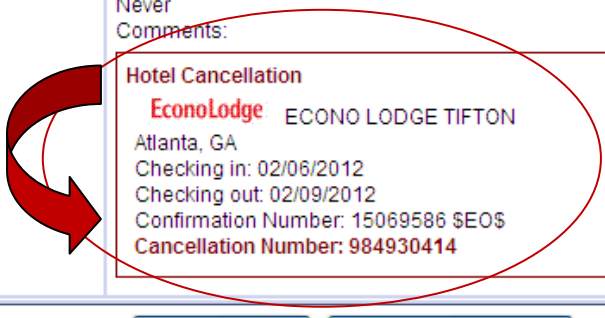
If you click on a cancelled/withdrawn trip instead of the Trip Actions box you will see the following:

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>Hotel segment Econo Lodge added on Wednesday, January 04, 2012 at 10:12 AM Eastern time. 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><p>Hotel Cancellation EconoLodge: ECONO LODGE TIFTON Atlanta, GA Checking in: 02/06/2012 Checking out: 02/09/2012 Confirmation Number: 15069586 \$EO\$ Cancellation Number: 984930414</p></div>



[View Itinerary](#) [Withdraw Request](#) [Close](#)