

# UNIGLOBE<sup>®</sup>

## Travel Designers

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## CONCUR : GETTING STARTED



Table of Contents

Welcome to Concur ..... 3

    Section 1: Logging on to Concur ..... 3

    Section 2: Retrieving and Changing your Password..... 4

    Section 3: Navigating Concur..... 6

    Section 4: Updating your Profile..... 7

    Section 5: Using Concur Travel ..... 8



## Welcome to Concur

Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools you need to book travel as well as create and submit expense reports.

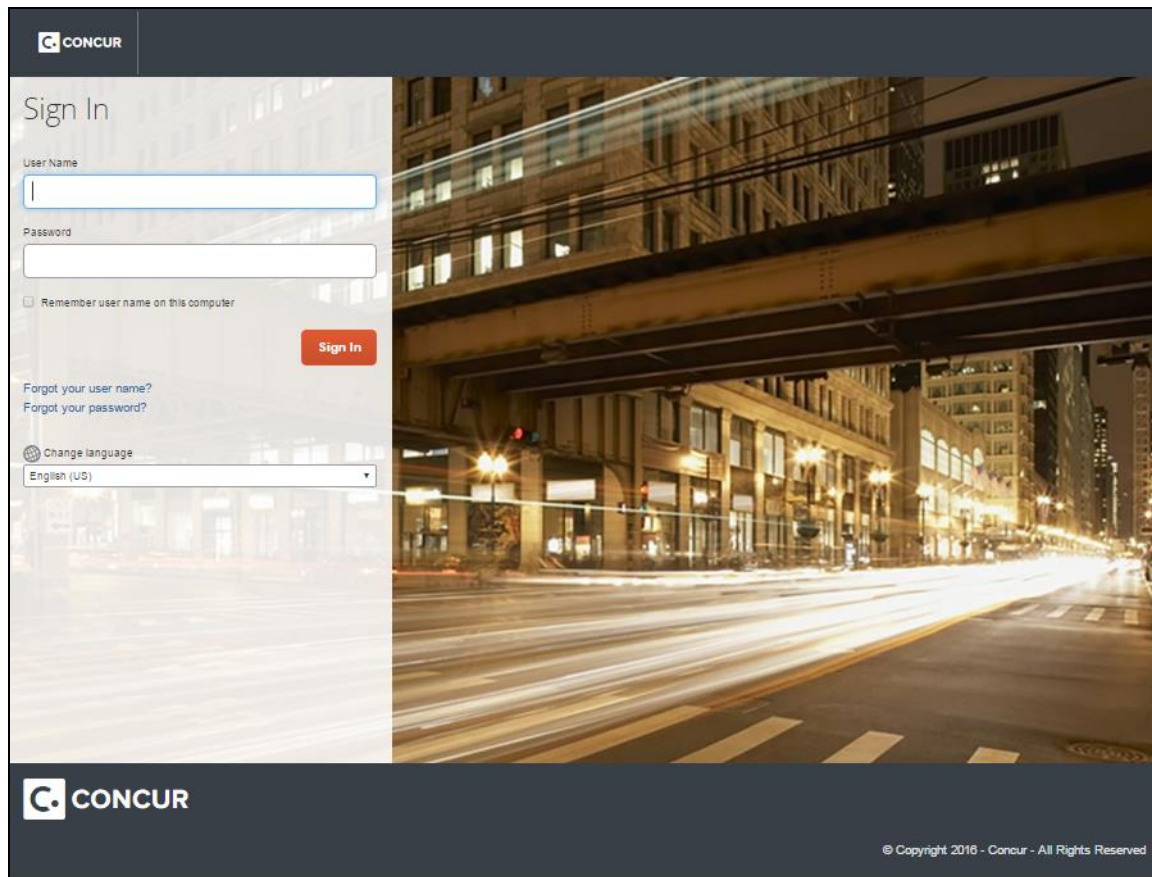
### Section 1: Logging on to Concur

#### How to...

1. Navigate to <https://www.concursolutions.com>.
2. Log onto Concur using your ID and Password
3. After entering your **User Name** and **Password**, and then click **Sign In**.

#### Additional Information

When logging onto Concur, remember that your password is case sensitive.



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## Section 2: Retrieving and Changing your Password

If you have forgotten your password, you can request to receive it in an email.

### Retrieving your password

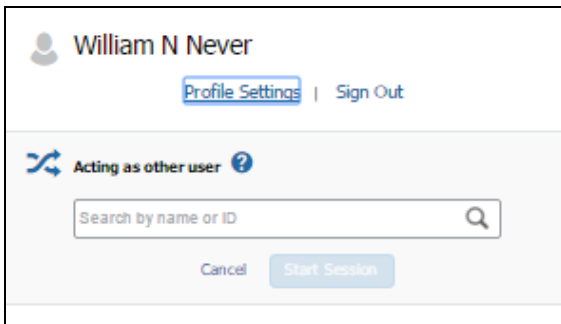
#### How to...

1. On the **Login** page, click the **Forgot your password?** link.
2. Select if you want an email with a password hint, or if you want an email with a link to reset your password, and then click **Submit**.

### Changing your password

#### How to...

1. After you log in, in the upper right corner of the page, click **Profile**, and then click **Profile Settings**.



2. On the **Profile Options** page, click **Change Password**.

#### Additional Information



## Profile Options

Select one of the following to customize your user profile.

### Personal Information

Your home address and emergency contact information.

### Company Information

Your company name and business address or your remote location address.

### Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

### E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

### Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

### Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

### Change Password

Change your password.

### System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

### Contact Information

How can we contact you about your travel arrangements?

### Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

### Bank Information

Bank Information

### Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Mobile Registration

Set up access to Concur on your mobile device

3. Enter and confirm your new password.

Note that your password must be at least seven characters with at least one number and one letter.

## Change Password

A password must be at least 6 characters. It may contain numbers (0-9), upper and lower case characters (A-Z, a-z) and symbols (such as ^%\*@#). It cannot contain spaces. *All fields are required.*

**Note: Passwords are case sensitive.**

**i** This will change your password for all Concur products.

Old Password	New Password	Re-enter New Password
<input type="text"/>	<input type="text"/>	<input type="text"/>

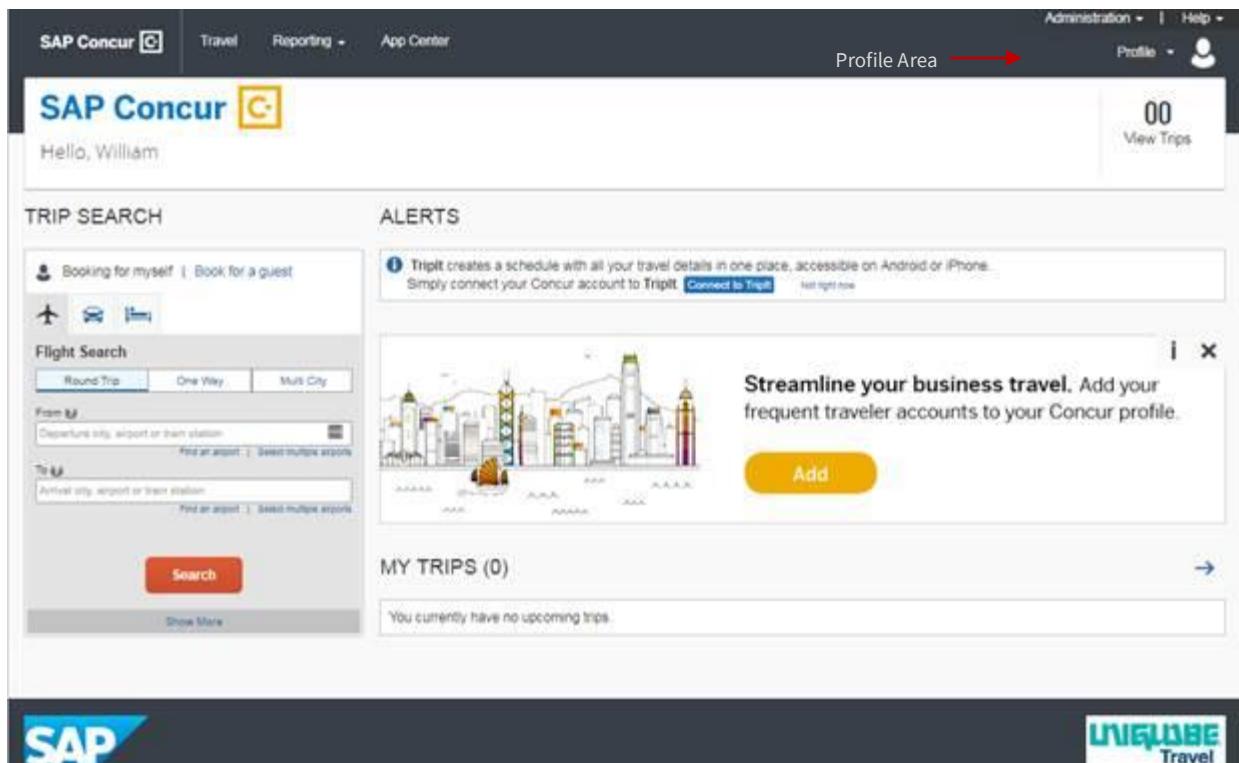
Password Hint (we will email this to you if you forget your password)

4. To act as a reminder, enter a hint for the password, and then click **Submit**.

## Section 3: Navigating Concur

The **Concur** home page includes the following sections that make it easy for you to navigate and find the information you need.

- **Quick Task Bar** – Provides direct access to expenses, reports, request, and other Concur features.
- **Profile Area** – Access / update your profile settings and information.
- **My Trips** – Displays a dashboard for your open requests, expenses, approvals, etc.
- **Trip Search** – Provides the tools you need to book a trip (If Concur Travel is enabled).



## Section 4: Updating your Profile

You use the **Profile Options** page to customize your user profile.

- **Your Information** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Travel Settings** - Enter expense preferences, add bank information, and company card information. You can also enter expense delegates and approvers.

### Step 1: Accessing your Profile page

#### How to...

- On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.

#### Additional Information

The screenshot shows the 'Profile Options' page. At the top, there is a navigation bar with the following links: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. On the left side, there is a sidebar menu with the following categories and sub-links:

- Your Information
  - Personal Information
  - Company Information
  - Contact Information
  - Email Addresses
  - Emergency Contact
  - Credit Cards
- Travel Settings
  - Travel Preferences
  - International Travel
  - Frequent-Traveler Programs
- Request Settings
  - Request Information
  - Request Delegates
  - Request Preferences
  - Request Approvers
  - Favorite Attendees
- Expense Settings
  - Expense Information
  - Bank Information
  - Expense Delegates
  - Expense Preferences
  - Expense Approvers
  - Favorite Attendees
- Invoice Settings
  - Invoice Information

The main content area is titled 'Profile Options' and contains the following sections:

- Personal Information**: Your home address and emergency contact information.
- Company Information**: Your company name and business address or your remote location address.
- Credit Card Information**: You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- Travel Profile Options**: Carrier, Hotel, Rental Car and other travel-related preferences.
- Bank Information**: Bank Information
- Request Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Change Password**: Change your password.
- System Settings**: Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**: How can we contact you about your travel arrangements?
- E-Receipt Activation**: Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Expense Delegates**: Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Mobile Registration**: Set up access to Concur on your mobile device.
- Travel Vacation Reassignment**: Going to be out of the office? Configure your backup travel manager.

## Step 2: Completing your information

### How to...

- Click the appropriate links on the **My Profile – Personal Information** page to complete your profile information, as needed.

### Additional Information

To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur for the first time and update it whenever your information changes.

Update your Travel preferences and any other appropriate information.

## Section 5: Using Concur Travel

You use Concur Travel to book a flight, rail, car, and/or hotel reservation.

### Step 1: Making a flight reservation

#### How to...

1. On the **Concur** home page, on the **Flight** tab on the left side of the page, select one of the following options.
  - Round Trip
  - One Way
  - Multi City

#### Additional Information

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





2. In the **From** and **To** fields, enter the cities for your travel, and then click **Search**.
3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.
4. Select **depart** or **arrive**, the time of day you want to fly, and time range from the dropdown arrows.
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.

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

Travel searches before and after the time you select.

Depending on your company's configuration, you can automatically reserve a car, which allows you to bypass viewing the car results. After you select a

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6. If you need a hotel, select the **Find a Hotel** check box.
  
7. Select **Schedule** or **Price** from the **Search by** dropdown arrow.
8. To search only fully refundable fares, select the **Refundable only air fares** check box.
9. If you do not want a flight with a double connection, select the **Flights w/ no double connections** check box.
10. Click **Search**.
  
11. Review the search results and select the most appropriate option for your flight.
  
12. To select your flight:
  - On the **Shop by Schedule tab**, click **Select** for the appropriate flight.
  - OR-
  - On the **Shop by Fares tab**, click **Select** next to the appropriate flights.

vendor and car type, a car is automatically added to your reservation.

You can choose to search for the hotel by:

- Airport
- Address
- Company Location
- Reference Point / Zip Code (a city or neighborhood)

To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the left. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

To select a seat, click the **View seats** link next to the flight. A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential.



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The screenshot shows the CONCUR Travel interface. The top navigation bar includes 'CONCUR', 'Requests', 'Travel' (selected), 'Expense', 'Invoice', 'Approvals', and 'App Center'. The right side has 'Administration', 'Help', 'Profile', and a user icon. Below the navigation, there are tabs for 'Travel', 'Trip Library', 'Templates', and 'Tools'. The main content area is titled 'SEATTLE, WA TO DALLAS, TX MON, JAN 23 - TUE, JAN 31' with a 'Show as USD' dropdown. On the left, a 'Trip Summary' sidebar shows 'Select Flights' (Round Trip, SEA - DFW, Depart: Mon, 01/23/2017, Return: Tue, 01/31/2017) and 'Finalize Trip'. Below this are sections for 'Change Flight Search', 'Depart - Mon, Jan 23' (with time sliders for Depart: 06:00 A - 11:34 A and Arrive: 12:09 P - 10:49 P), 'Display Settings' (Hide Propeller Planes), and 'Airport Filters' (Departure: SEA - Seattle, WA). The main search results area shows a 'Hide matrix Print' link and a table of results by airline. Below the table are 'Shop by Fares' and 'Shop by Schedule' tabs. The 'Shop by Schedule' tab is active, showing 'Depart' and 'Return' options. The 'Depart' section is expanded for 'Seattle, WA - Mon, Jan 23', displaying a search bar, 'Sorted By: Depart - Earliest', and 'Displaying: 56 out of 56 results. Previous 1 2 3 4 5 6 Next | All'. Two flight options are shown: a United nonstop flight from SEA to SFO (06:00a) and another United nonstop flight from SFO to DFW (10:40a), both in Economy class. A 'Select' button is next to the second flight. At the bottom of the flight card, it says '8h 24m / United 0368, United 5750 - View seats Airbus Industrie A320-100/200, E7W (Worldspan)'.

13. On the **Review and Reserve Flight** page, review your information, select a method of payment, and then click **Reserve Flight and Continue**.

Add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.



### Trip Summary

- Flights Selected**  
Round Trip  
SEA - DFW  
Depart: Mon, 07/24/2017  
Return: Fri, 07/28/2017
- Select a Car** [Remove](#)  
Pick-up: Mon, 07/24/2017  
Drop-off: Fri, 07/28/2017
- Select a Hotel** [Remove](#)  
Nights: 4  
Dates: TX  
Check-in: Mon, 07/24/2017  
Check-out: Fri, 07/28/2017
- Finalize Trip

### Review and Reserve Flight

#### REVIEW FLIGHTS

**DEPART** ✕ Mon, Jul 24 - Seattle, WA to Dallas, TX [Hide details](#)

Mon, Jul 24 08:05a SEA → 12:06p DFW 4h 04m American Airlines 1332 Boeing 737-800

**RETURN** ✕ Fri, Jul 28 - Dallas, TX to Seattle, WA [Hide details](#)

Fri, Jul 28 04:55p DFW → 07:07p SEA 4h 12m American Airlines 1220 328

#### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. @

**Primary Traveler** [Edit](#) | [Review all](#)

Name: William Nate Never Phone: 1 425 590 4567

Frequent Flyer Programs [Add a Program](#)  
For American Airlines

#### SEAT ASSIGNMENT

Seats will be automatically selected based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete. [View seatmap](#)

#### REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$442.79	\$61.61	\$504.40
Total Estimated Cost: \$504.40			
Total Due Now: \$504.40			

#### METHOD OF PAYMENT

This purchase will be charged to your company directly.

**⚠ This is a Non-Refundable Ticket**  
Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carriers system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

[Back](#) [Reserve Flight and Continue](#)

This where you enter your personal credit card information. Information will be stored for future use.



## Step 2: Selecting 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. Click the **Total cost** button next to the appropriate rental car.

### 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.

**CONCUR** Requests **Travel** Expense Invoice Approvals App Center Administration | Help Profile

Travel Trip Library Templates Tools

**Trip Summary**  
**Select a Car**  
 Pick-up: Mon, 01/23/2017  
 Drop-off: Tue, 01/31/2017  
 Finalize Trip

Change Car Search

**Car Display Filters**

- Unlimited miles
- Air conditioning
- Hybrid

**Car Transmission**

- Automatic
- Manual

PICK UP: (DFW) ON MON, JAN 23 12:00 PM  
 RETURN: TUE, JAN 31 12:00 PM  
 Show as USD

Hide matrix Print

All 52 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car
<b>AVIS</b> Most Preferred	42.86	43.00	45.14	52.14	53.86	71.29	88.00
<b>Enterprise</b>	20.55	20.55	20.85	21.15	21.15	57.00	67.86
<b>Hertz</b>	42.29	42.57	45.00	51.86	53.86	71.95	86.14
<b>Enterprise</b>	43.05	43.19	--	--	--	--	--

Sorted By: Policy - Most Compliant

Displaying: 7 out of 32 results.

**AVIS** **Economy Car - \$42.86 per day (Worldspan)** Total cost\*  
**\$518.34**

Automatic transmission  
 Unlimited miles, Pick-up: Terminal: DFW  
 Adults: 2, Children: 2, Large bags: 1, Small bags: 1  
 \$300.00 weekly rate

Most Preferred Car Vendor for Learning Services Demo / E-Receipt Enabled Location details

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**AVIS** **Compact Car - \$43.00 per day (Worldspan)** Total cost\*  
**\$519.80**

Automatic transmission  
 Unlimited miles, Pick-up: Terminal: DFW  
 Adults: 2, Children: 2, Large bags: 1, Small bags: 2  
 \$301.00 weekly rate

3. Review your car rental details, and then click **Reserve Car and Continue**.
4. Review your travel details, and then click **Next**.

### Step 3: Selecting a hotel

**How to...** **Additional Information**

1. If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results appear after you choose your rental car.

The screenshot displays a travel booking interface. On the left, a 'Trip Summary' sidebar shows:
 

- Flights Reserved:** Round Trip SEA - DFW, Depart: Mon, 07/24/2017, Return: Fri, 07/28/2017.
- Car Reserved:** Pick-up: Mon, 07/24/2017, Drop-off: Fri, 07/28/2017.
- Select a Hotel:** Nights: 4, Dates: TX, Check-in: Mon, 07/24/2017, Check-out: Fri, 07/28/2017.
- Total Estimated Cost:** Air (USD 504.40), Car (USD 507.59), Total (USD 1,011.99).
- Filters:** Price range (\$145 - \$500), Display Settings (E-Receipt Enabled), Hotel Chain (Chain selected), and Hotel Amenities.

 The main area features a map of the Dallas-Fort Worth area with numbered location pins (1-19) and a 'Company Preferred Hotel' icon. Below the map, a search bar shows 'Hotel Name Search' and 'Sorted By: Policy - Most Compliant'. The results list four hotels:
 

- 1. Fairfield Inn by Marriott:** 4800 W John Carpenter Fwy, Irving, TX 75063. Price: \$149. 2 miles from airport. Rating: 4 stars.
- 2. Courtyard by Marriott:** 1151 W Walnut Hill Lane, Irving, TX 75038. Price: \$161. 4.23 miles from airport. Rating: 4 stars.
- 3. Residence Inn Dallas DFW Airport South:** 2200 Valley View Lane, Irving, TX 75062. Price: \$169. 4.17 miles from airport. Rating: 4 stars.
- 4. SpringHill Suites by Marriott:** 5600 High Point, Irving, TX 75038. Price: \$179. 3.9 miles from airport. Rating: 4 stars.

 Each hotel listing includes a 'View Rooms' button and a note: 'Most Preferred Hotel Chain for Learning Services Demo E-Receipt Enabled'.

2. Use the filter options to narrow your search by

**Hotel Chain or Amenities.**

3. Click **View Rooms** to view room rates.
4. When you are ready to reserve your hotel room, click the rate button next to the desired room type.
5. Review the information on the **Review and Reserve Hotel** page, select the check box to agree, and then click **Reserve Hotel and Continue**.

## Step 4: Completing the reservation

### How to...

1. Review the **Travel Details**, 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. Click **Confirm Booking** to finalize your trip.
5. On the **Pre-populating Your Expense Report** page, you can add transportation and parking expenses, and then click **Finish**.

### Additional Information

From here, you can add or make changes to the car or hotel as well as change the dates of the flight. Depending on your company's configuration you may be able to add parking, taxi, wifi, or dining at this time.

The trip name and description data are for your record keeping. You can choose to send a copy of the confirmation to additional recipients.

You will see the name, itinerary, and ticketing deadline, along with the total estimated cost.

## Step 5: Cancelling or changing an airline, car rental, or hotel reservation

### How to...

1. At the top of the **My Concur** page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

### Additional Information

**\*\*Directly contact UNIGLOBE Travel Designers to make these changes or when you are ready to re-book your cancelled flight.**

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.



Company Notes		Upcoming Trips		Trips Awaiting Approval		Remove Trips	
Trip Name/Description	Status	Start Date	End Date	Action			
Viaggio da Seattle a Denver (N9OLO8) (33D7)	Needs Expense Report Withdrawn	11/12/2015	14/12/2015	Expense			
Car Reservation at CHICAGO (75QJLZ)	Needs Expense Report Withdrawn	08/02/2016	12/02/2016	Expense			
Trip SEA to ORD (75PDHD)	Needs Expense Report Withdrawn	08/02/2016	12/02/2016	Expense			
Trip from Seattle to Memphis (M96NLS)	Needs Expense Report Withdrawn	22/02/2016	26/02/2016	Expense			
Trip TXL to ORY (M9E6OY)	Needs Expense Report Withdrawn	09/05/2016	13/05/2016	Cancel Trip   Expense			
Trip TXL to ORY (2Z34BS)	Withdrawn	16/05/2016	20/05/2016				

- To change a trip, in the **Action** column, click **Change Trip**.
- On the **Itinerary** page, select the portion of the trip you want to change.
- To cancel your entire trip, in the **Action** column, click **Cancel Trip**, and then click **OK**.

When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. **If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips.**

**\*\*Again, contact UNIGLOBE Travel Designers when you are ready to re-book so we can apply a fee waiver when applicable.**

