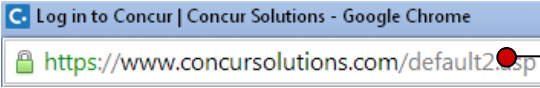


Getting Started Guide



Logging in to Concur T&E

Access Concur Travel & Expense




Navigate to:
<https://www.concursolutions.com>

Enter your **User Name** and **Password**.

Click **Login**.

Retrieve or Change a Password

 If you have forgotten your password, on the login page, click the **Forgot your password?** link.

As needed, you can also change your password by clicking **Change Password** in your Profile. To change your password in your Profile:

A password must be at least 6 characters. It can 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.

Enter and confirm your new password. (It must be at least 7 characters with at least one number and one letter.)

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

Enter a hint for the password.


Click **Submit**.

Navigating

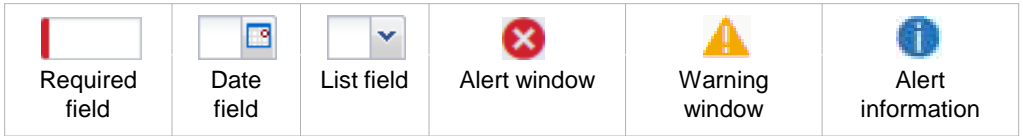
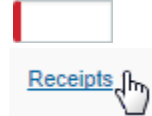
Use Common Fields



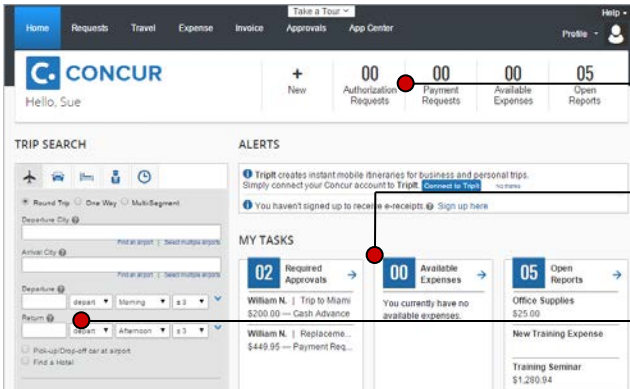
The QuickTask bar provides direct access to features. (e.g. *Create a new expense report.*)

 A field preceded by a red line must be filled.

Highlighted text indicates a link or action.



The Home Page

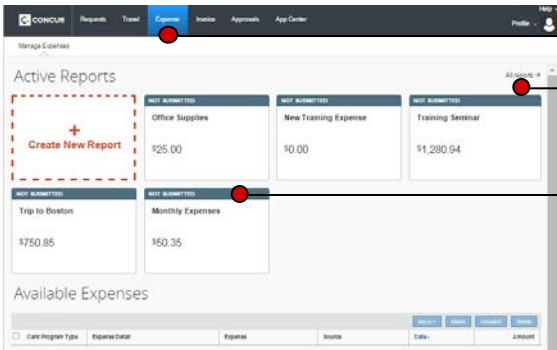


QuickTask bar for expenses, reports, requests, and actions.

Dashboard for expenses, approvals, etc.

Trip Search fields. (If Concur Travel is enabled.)

The Expense Report Page



Action buttons.

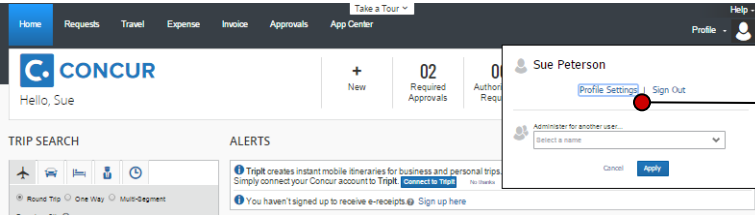
Click **All reports** to view all reports.

Expense report.

Updating Your Profile

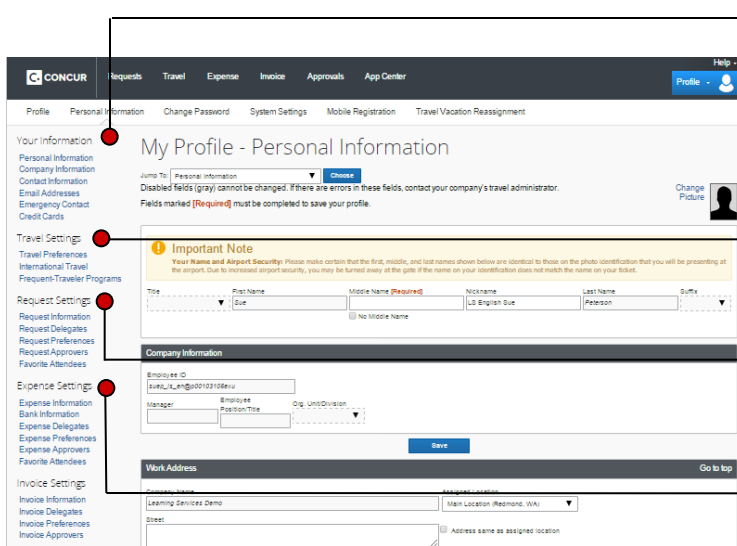
To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur Travel & Expense for the first time and update it whenever your information changes.

Access your profile page



Access via **Profile > Profile Settings.**

Complete your profile information



Your Information (validate personal information such as name, address, phone, and emergency contact, etc.)

Travel Settings (enter air, hotel, and car travel preferences, enter frequent flyer programs, enter TSA passport information, add/remove travel assistant, add/remove credit cards.)

Request Settings (select request information, add/remove delegates, enter email settings select approvers, add/remove attendees.)

Expense Settings (enter expense preferences, add bank information, enter expense delegates and approvers, add company card information, etc.)

Using Concur Travel

Enter Search Criteria

TRIP SEARCH

Round Trip One Way Multi-Segment

Departure City

Arrival City

Departure depart Morning ±3

Return depart Afternoon ±3

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

Specify airline
 Refundable only air fares

Class of Service: Highest allowed

Search flights by: Price Schedule

Online booking available for **Flights** (One Way or Return), **Hotel** and **Car Rental**.

Enter the arrival and departure cities.

Enter the date and time of departure and return.

Click **Search** to retrieve the search results.

Select Quote Price

Trip Summary
Select Flights
SEA - WAS
Outbound Mon, 11/17/2014
Return Fri, 11/21/2014

Seattle, WA To Washington, DC
Mon, Nov 17 - Fri, Nov 21

Chosen Carriers

Outbound	Carrier	Class	Status
United 1712	SEA	Economy	OK
United 1714	ORD	Economy	OK

NOTE: Please use schedule page to select your flights.

Outbound	Carrier	Class	Status
SEA	SEA	Economy	OK
SEA	ORD	Economy	OK

Select **Quote for Price** to add to the **Chosen Carriers** list.

Trip Summary
Select Flights
SEA - WAS
Outbound Mon, 11/17/2014
Return Fri, 11/21/2014

Seattle, WA To Washington, DC
Mon, Nov 17 - Fri, Nov 21

Chosen Carriers

Outbound	Carrier	Class	Status
United 1712	SEA	Economy	OK
United 1714	ORD	Economy	OK

NOTE: Please use schedule page to select your flights.

Return	Carrier	Class	Status
US Airways 17117	DCA	Economy	OK
US Airways 17141	DFW	Economy	OK

Click the **Price these options** button to view fares.

Using Concur Travel

Select Trip Fare

Seattle, WA To Washington, DC
Mon, Nov 10 - Fri, Nov 14

Price-to-Best \$947

Carrier	Class	Price	Duration
United	Y	\$947	10:00 AM - 11:30 AM
American	M	\$947	12:00 PM - 12:54 PM

Select the desired trip.

For details on pricing conditions, click **Show Details**.

Narrow the results, if necessary, by using the available filters.

Review and Reserve Flight

REVIEW FLIGHTS

Outbound Flight: Seattle, WA (SEA) - Baltimore, MD (BWI) - Mon, Nov 17

Flight	Carrier	Class	Price	Duration
SEA to BWI	United	Y	\$450	10:00 AM - 11:30 AM
BWI to SEA	American	M	\$497	12:00 PM - 12:54 PM

ENTER TRAVELER INFORMATION

PRIMARY TRAVELER
Name: Sue Peterson Phone: 200-555-1212

SEAT ASSIGNMENT
Click **View seatmap** to select your seat assignment.

SELECT A METHOD OF PAYMENT
Click **Add Payment Method** to add a payment method.

ACCEPT FARE RULES AND RESTRICTIONS
Click **Reserve Flight and Continue** to proceed.

Validate the trip information. You can modify your itinerary and add a hotel and/or rental car.

Verify and enter any necessary traveler information, including frequent flyer programs.

Click **View seatmap** to select your seat assignment.

Select or add a method of payment.

Accept fare rules and restrictions.

Click **Reserve Flight and Continue**.

Using Concur Travel

Confirm Your Reservation

The screenshot displays the Concur Travel interface. At the top, there are navigation tabs for 'CONCUR', 'Requests', 'Travel', 'Expenses', 'Invoice', 'Approvals', and 'App Center'. Below this, a 'Trip Summary' sidebar shows 'Flights Reserved' and 'Finalize Trip' options. The main area is titled 'Travel Details' and contains a 'Trip Overview' section with fields for 'Trip Name', 'Start Date', 'End Date', 'Created', 'Description', 'Agency Record Location', and 'Passengers'. A 'Total Estimated Cost' of \$325.20 USD is shown. Below this is a 'Gogo Wi-Fi' advertisement. The 'Reservations' section lists two flights: 'Seattle, WA (SEA) to Salt Lake City, UT (SLC)' and 'Salt Lake City, UT (SLC) to Baltimore, MD (BWI)'. Each flight entry includes departure and arrival times, flight numbers (Delta 1634 and Delta 1203), and confirmation codes (GUDBYZ). A 'Cancel All Air' link is visible next to each flight. At the bottom, a 'Total Estimated Cost' table shows a breakdown of Airfare (\$262.47 USD), Taxes and Fees (\$62.73 USD), and a Total Estimated Cost of \$325.20 USD. A 'Remarks' section contains a message about a credit card payment error. At the very bottom, there are 'Next' and 'Cancel' buttons.

Verify travel details. You can add car, taxi, hotel, and wifi to your travel itinerary.

You may have the option to select in-flight internet service.

Click **Cancel all Air** if your reservations are incorrect.

Confirm your travel reservations. You can add your seat assignment, or add car, hotel, and taxi.

Click **Next** to continue.

Using Concur Travel

Confirm Your Reservation

Travel | Flights to Book | Trip Library | Templates | Tools

Trip Summary

Flights Reserved

Advance Trip
SEA - WAS
Outbound Mon, 11/10/2014
Return Fri, 11/14/2014

Finalize Trip

Review Travel Details
Enter Trip Information
Submit Trip Confirmation

Trip Booking Information

The trip name and description are for your record-keeping convenience.

Trip Name:

Trip Description (optional):

The form defaults to the language:

Send a copy of the confirmation to:

Send my email confirmation as HTML or PDF format:


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**

Verify the name of the trip – you can update the name, as needed.

To send a copy of your travel confirmation, add an email address.

Once the information is complete, click **Next**.

 At this time, **tickets are only reserved and unissued**. Approval of the reservation is required before issuance of the ticket (except in special cases with **low cost** airline tickets)

Trip Confirmation

To **COMPLETE BOOKING**, please press the "Confirm Booking" Button after reviewing this page.
To **CANCEL**, press the Cancel button.

Trip Overview

Trip Name: Trip from Seattle to Washington
Start Date: Nov 10, 2014
End Date: Nov 14, 2014
Created: Oct 29, 2014, Sue Peterson (Modified: Oct 29, 2014)
Description: (No Description Available)
Agency Record Locator: MRH40V
Passengers: Sue Peterson
Total Estimated Cost: \$325.20 USD

i Airfare must be ticketed by an agent by: 10/31/2014 2:00 AM Eastern

Reservations

Monday, November 10, 2014

Flight Seattle, WA (SEA) to Salt Lake City, UT (SLC)

Delta 1634

Departure: 06:00 AM
Gate: No seat assignment
Seattle Tacoma Int Apt (SEA)
Duration: 1 hour, 58 minutes
Nonstop

Arrival: 08:55 AM
Salt Lake City Int Apt (SLC)
Terminal: 2

Confirmation: GUD9YZ
Status: Confirmed

Additional Details
Airport: Boeing 737-200
E-Ticket
Cabin: Economy (Y)
Distance: 639 miles

53 min layover at Salt Lake City Int Apt (SLC)

Almost done... Please confirm this itinerary.

Display Trip | Previous | **Confirm Booking** | Cancel

Confirm the trip on the **Trip Confirmation** page.

Click **Confirm Booking** to confirm, or **Cancel** to cancel trip.