MISSISSIPPI STATE UNIVERSITY™

TRAVEL SERVICES

Concur Travel User Guide

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Updating Your Travel Profile

Before you use Concur's travel application for the first time, update your Travel profile. Even if you make no changes, you must **save** your profile before you can book a trip in Travel.

Use the Travel profile options to set or change your personal Travel preferences and settings.

They include:

- Assistant or travel arranger
- Credit card
- Email options
- E-Receipts
- Language
- Password
- Personal preferences (name, address, emergency contact, credit card)
- Regional preferences (number format, date format, language)
- Register for Concur for Mobile
- Travel preferences (air, hotel, car rental, rail preferences)
- Travel vacation reassignment
  and
- Other preferences and settings (default home page, calendar, emails, accessibility mode)

Travel Arranger

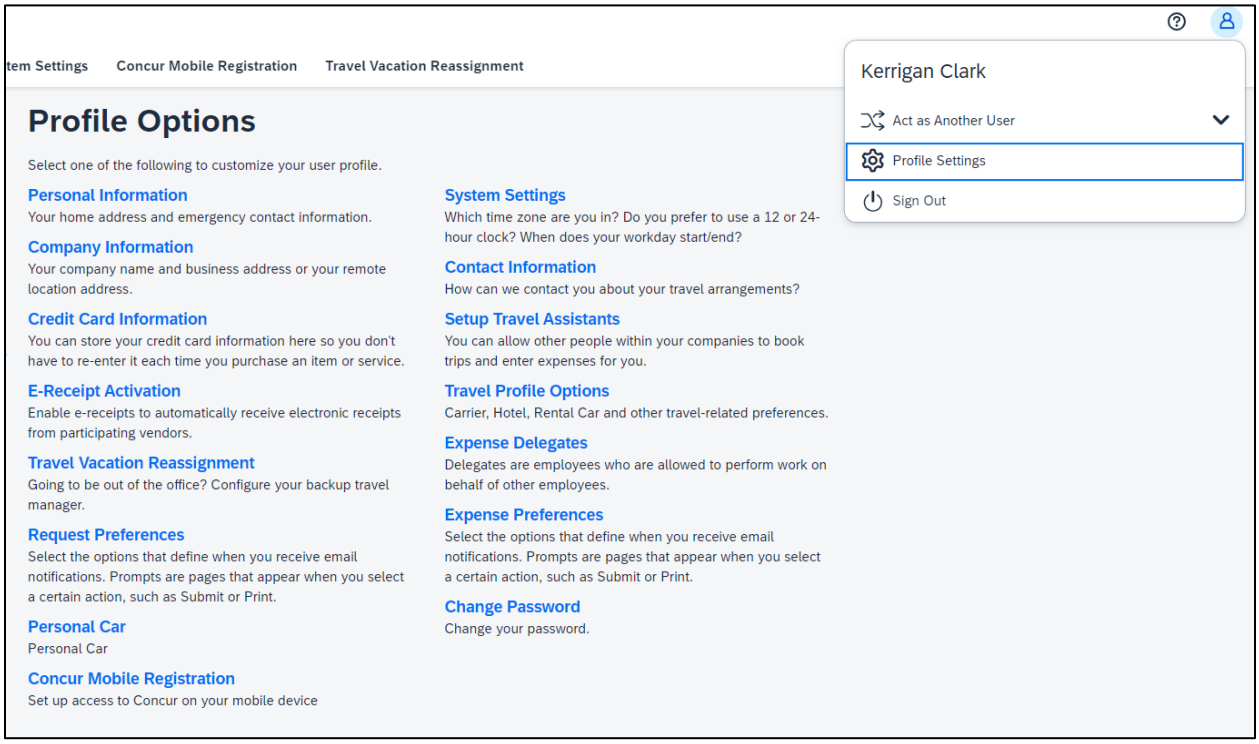
If you are a travel arranger and you want to change the profile of one of your users:

- Click KC (your initials in upper-right hand corner).
- Click the **Act as Another User** dropdown and select **A Delegate for another user who has granted you this permission.**
- In the field, type the first few letters of the user's name.
- Select the desired user from the search results.
- Click **Switch**.

Access

To access the profile information:

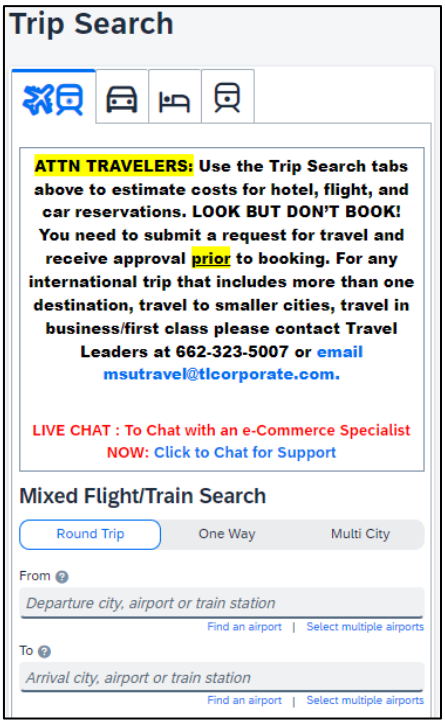
- Click KC (your initials in upper-right hand corner) > **Profile Settings**. The **Profile Options** page appears.
- Select the desired option on the left side of the page.



Obtain Airfare Quote

Before booking a flight, you must complete a request. The steps below walk through using the Trip Search tool on the Concur homepage. Use this tool to collect the price quotes ONLY. Do NOT book from the Trip Search tool. It is required to book from a request that has already been approved.

From the **Concur Home** page, use the Air / Rail tab to retrieve a flight quote.
You can access the Air / Rail tab on the left side of the home page.



1. Select one of the following types of flight options:
   - Round Trip
   - One Way
   - Multi City

2. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. When you enter a city, airport name, or airport code, Concur will automatically search for a match.
   - **NOTE:** Use the **Find an airport** and **Select multiple airports** links as needed.

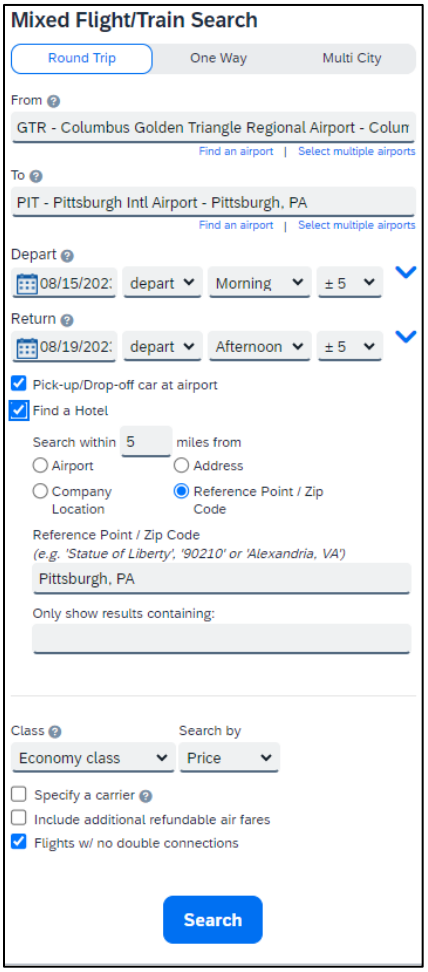
3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the desired time range.
   - Click the arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary, to see/reserve nonstop flights.

4. Check the **Specify a carrier** check box if desired.
   - **NOTE:** You can only search one vendor at a time, and this will override the preferred airline searches normally done for all the frequent flyer number carriers.
   - If you click the **Specify a carrier** check box, a list of carriers appears that are color coded:
     - The first (yellow) will be their frequent flyer carriers.
     - The second (gray/khaki) are the most requested airlines.
     - The remaining airlines are in alphabetical order.

5. For **Search flights by**, select either **Price** or **Schedule**.

6. If necessary, uncheck the **Flight w/ no double connections** check box.

7. Click **Search**. The flight search results appear.

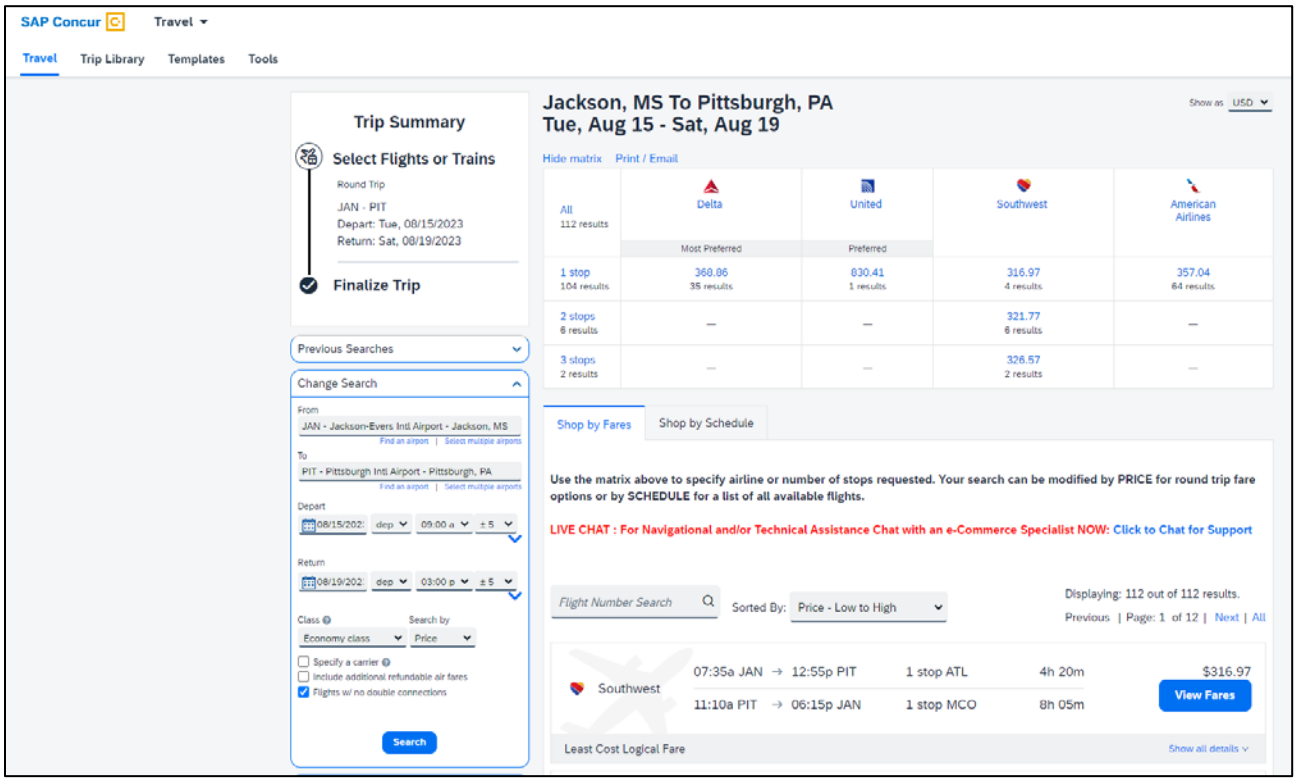


8. There are a variety of filters set on the left side of the page. Use show ⌄ and hide ⌃ as needed.
   - In the **Change Search** area:
     - Change your airports, dates, times, etc.
     - Click **Search**. Travel displays the new results.
   - Use the slider in the **Depart, Return,** or **Price** areas to narrow your search.
   - In the **Display Settings, Airport Filters,** and **Connecting Airport Filters** areas, select the desired options.

9. Use the information provided on the Flight Search results page to obtain your quote ONLY. Do NOT select any flights to book at this point. Make a note of the price and include it in your request.
    - What you will see on the Flight Search results page:
        - If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
        - If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active.
        - (Click either **Shop by Fares** or **Shop by Schedule** - whichever applies - for the appropriate help information).

NOTES:

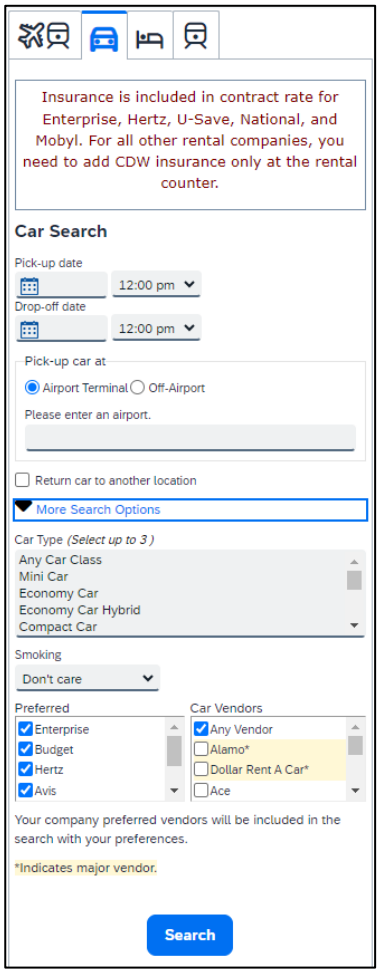
- The graphical display is based on flight schedule data. It will not show any rail options, nor can it take refund-ability or class of service preferences into account.
- Click "View Fares" to see fare option, but do NOT select any flights to book at this point.
    - The ⚠ icon next to the price reflects an option that will trigger one or more company travel policy rules.
    - The ✓ icon next to the price reflects an option that conforms with MSU travel policy.



Obtain Car Rental Quote

Before booking a car, you must complete a request. The steps below walk through using the Trip Search tool on the Concur homepage. Use this tool to collect the price quotes ONLY. Do NOT book from the Trip Search tool. It is required to book from a request that has already been approved.

From the **Concur Home** page, use the Car tab to retrieve a car rental quote.
You can access the Car tab on the left side of the home page.



1. Enter your pick-up and drop-off dates and times.
   - In the **Pick-up car at** section, select either:
     - **Airport Terminal** and then type the city or the Airport code.
     - **Off-Airport** and then enter (or search for) the location.

2. Select **Return car to another location**, if desired. Additional fields appear. Choose the desired location.

3. To see additional search preferences, click **More Search Options**.
   - Select the **Car Type**.
     NOTE: Hold the Ctrl key to select more than one type.
   - Select smoking or non-smoking.
   - Select the preferred vendors.

4. Click **Search**. The rental car search results appear.

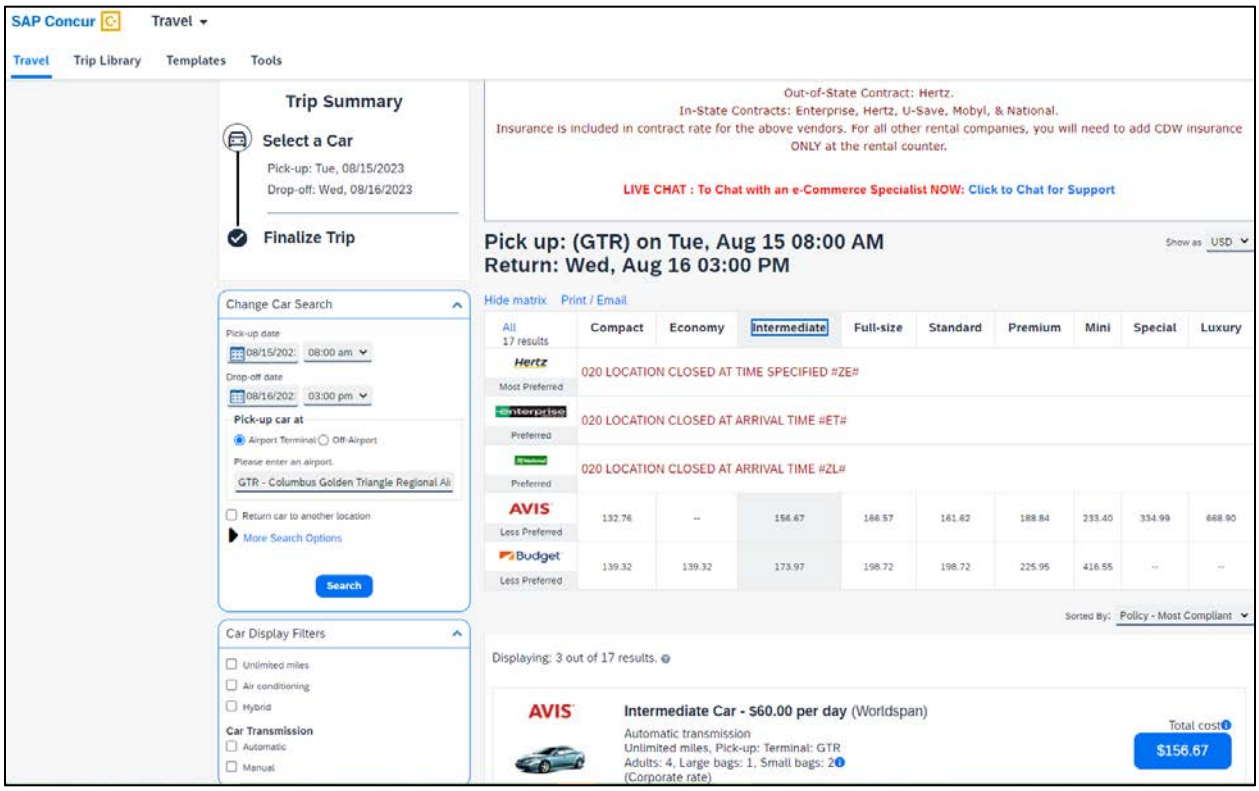
5. There are two sets of filters: one at the top of the page and one at the left side of the page.
   - **Left side of the page**: Use the show and hide arrows as needed.
     - In the **Change Car Search** area:
       - Change your pick-up and drop-off dates and times; change your pick-up location; change your drop-off location.
       - Expand **More Search Options** to select car type, vendors, etc.
       - Click **Search**. Travel displays the new results.
     - In the **Car Display Filters** area, select the desired options.

   - **Matrix - Top right side of the page**: Use the grid to filter the results.

- Vendors are displayed in the left column.
- The shaded column displays the intermediate car option defined in MSU's travel policy.
- To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
- To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
- To see cars of a particular size *and* a particular vendor, click the appropriate cell. The search results below will reflect that choice.

6. Below the matrix is the **Sorted By** list. Select the desired sort option.

7. Use the information provided on the results page to obtain your quote ONLY. Do NOT select any cars to reserve at this point. Make a note of the price and include it in your request.



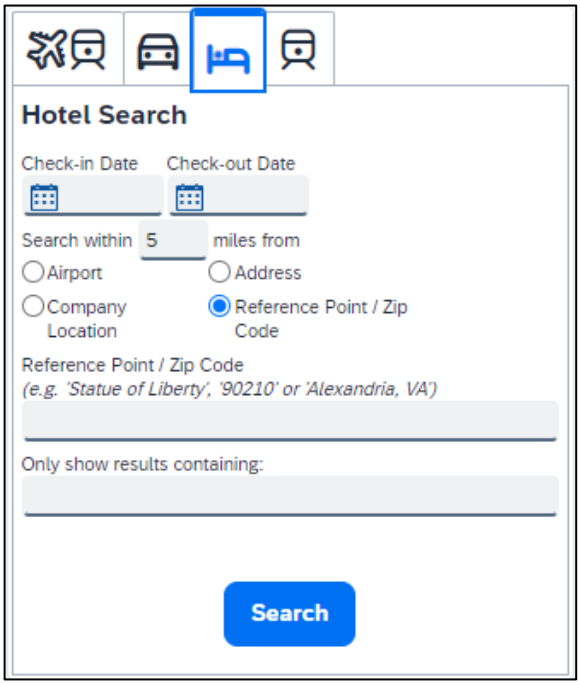
Notes:

- The ⚠ icon next to the price reflects an option that will trigger one or more company travel policy rules.
- Review the boxes above the **Matrix** for information/policy on the state-contracted vendors.
- Review the price and options.
- Click the picture of the car (if available) to see a larger picture as well as passenger and luggage capacity.
- Click **Location details** for more information about the available options.

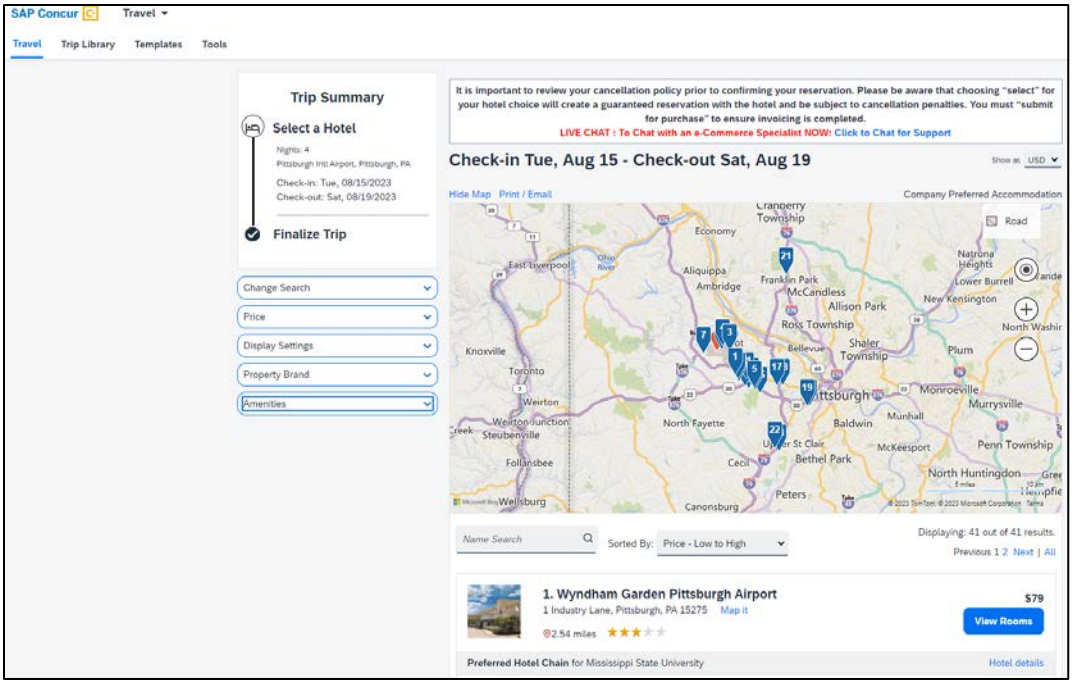
Obtain Hotel Quote

Before booking a hotel, you must complete a request. The steps below walk through using the Trip Search tool on the Concur homepage. Use this tool to collect the price quotes ONLY. Do NOT book from the Trip Search tool. It is required to book from a request that has already been approved.

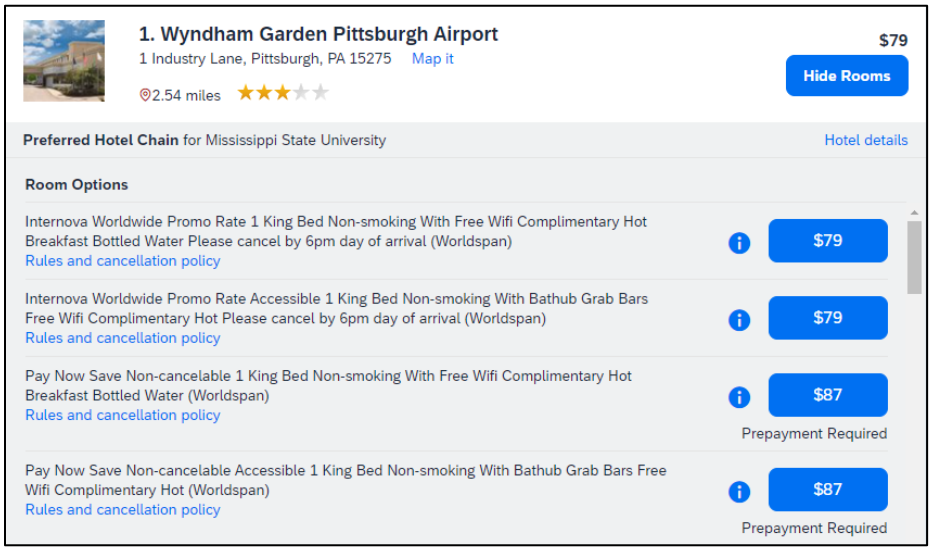
From the **Concur Home** page, use the Hotel tab to retrieve a hotel room quote. You can access the Hotel tab on the left side of the home page.



1. Enter the check-in and check-out dates (or click each field and use the calendar).
2. Enter the search radius and choose either miles or kilometers. Concur will always show *company preferred hotels* within a larger radius, usually 30 miles or kilometers.
3. Choose to search near an airport, near an address, near a company location, or near a reference point / zip code (a city or neighborhood).
4. Click **Search**. The hotel search results appear.
5. There is a filter set on the left side of the page. Use show and hide as needed.
   - In the **Change Search** area:
     - Change your check-in and check-out dates; change your hotel location.
     - Click **Search**. Travel displays the new results.
   - Use the slider in the **Price** area to narrow your search.
   - In the **Property Brand** area, select the desired hotels.
   - In the **Amenities** area, select the desired options.
6. Review the hotel map if desired. Click any blue 1 to see specific hotel information. Click, zoom, and move the map as desired.
7. Sort the results if desired. Below the map, select from the **Sorted By** list to sort the results. Enter hotel names if desired.

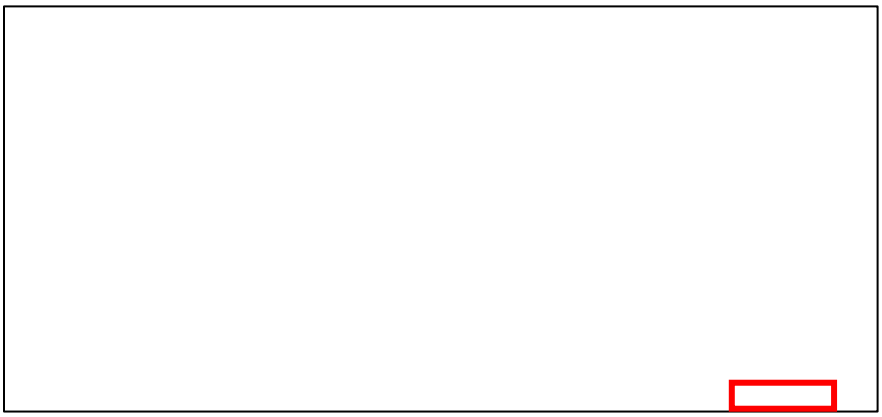


8. Use the information provided on the results page to obtain your quote ONLY. Do NOT select any hotel rooms to reserve at this point. Make a note of the price and include it in your request.
   - Click **View Room** to see:
     - The available rates
       - Click the ⓘ icon next to the price to see information on the rate.
     - Other amenities per room/rate
     - Rate details and cancellation policy

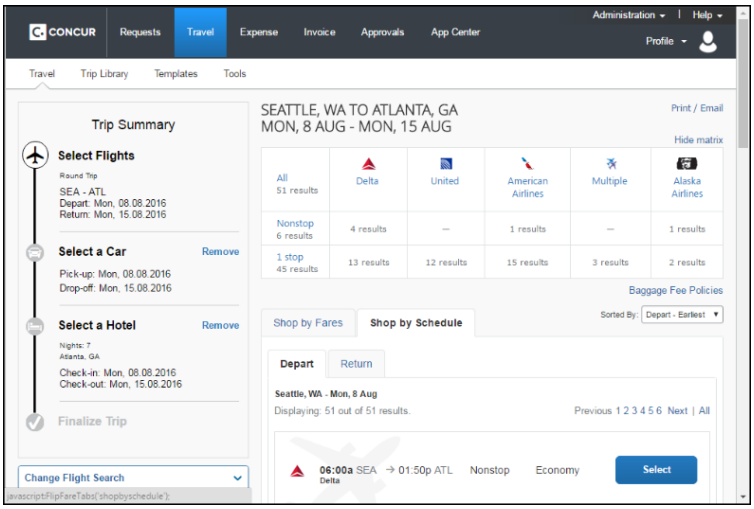


Book a Flight

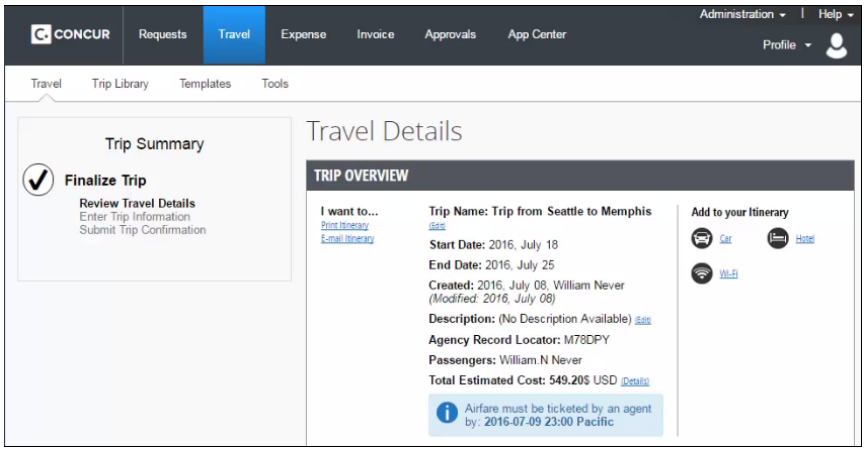
1. From your approved request, select the request that is now Pending On-line Booking. Click the **Book Travel** button in the Upper-Right hand corner of the request.
2. Click **Proceed to Booking**.



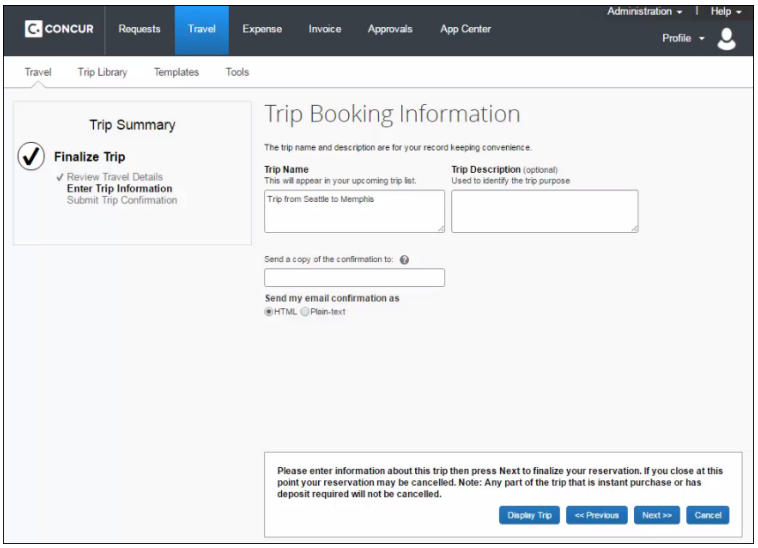
3. On the Flight Search results page:
   - If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
   - If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active.
   - (Click either **Shop by Fares** or **Shop by Schedule** - whichever applies - for the appropriate help information).
4. Sort the results (if desired).
   - **Matrix** (Top right side of the page)**:** Use the grid to filter the results.
     - To see flights for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
     - To see flights with a particular number of stops, click the cell for that stop count. The search results below will reflect that choice.
     - To see cars of a particular stop count and a particular vendor, click the appropriate cell. The search results below will reflect that choice.
   - Below the matrix is the **Sorted By** list. Select the desired sort option.
5. Review the results and select the desired flight.



6. After selecting the flight:
   - If you requested a car, the rental car search results appear. Reserve the Car Rental.
   - If you requested a hotel, the hotel search results appear. Reserve the Hotel.
7. Review and change your itinerary, if necessary.
   - In the **Trip Overview** section:
     - Review the information for accuracy.
     - In the **I want to** section, print or email as appropriate.
     - In the **Add to your Itinerary** section, add a car, hotel, etc., as necessary.
   - In the **Flight** section:
     - Verify the information for accuracy.
     - Click **Change Seat** to select a difference seat (depending on the airline).
     - Click **Cancel all Air**, if necessary.
   - Review the remaining sections as necessary and make the appropriate changes.
   - Review the **Total Estimated Cost** section.

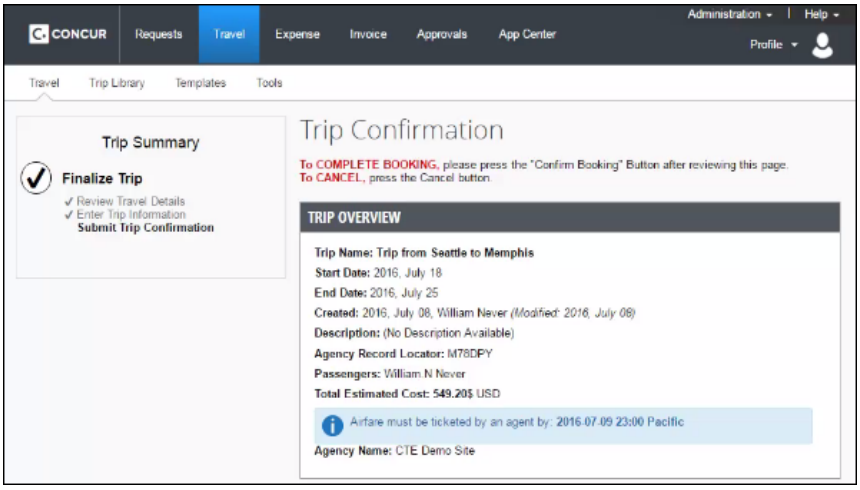


8. Click Next. The Trip Booking Information page appears.
9. Use the **Trip Booking Information** page to enter additional information about your trip.

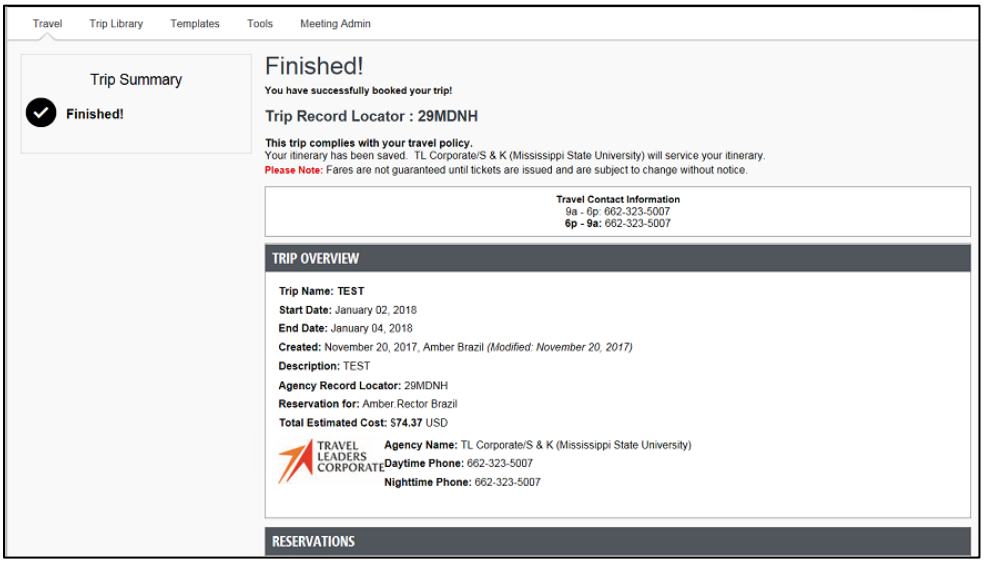


- Enter or modify your trip name. This is how the trip will appear on your itinerary and in the automated email from Concur.
- Enter a trip description.
- Enter any comments for the travel agent.
  - **NOTE: Be aware that making an entry in this field will likely generate an agency fee**.
- Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.
- If you book the trip, you will automatically receive the email.
- If you book as an arranger, you will also receive the email.

10. Click Next. Concur displays your itinerary on the Trip Confirmation page. This itinerary will include any messages about ticketing policies.



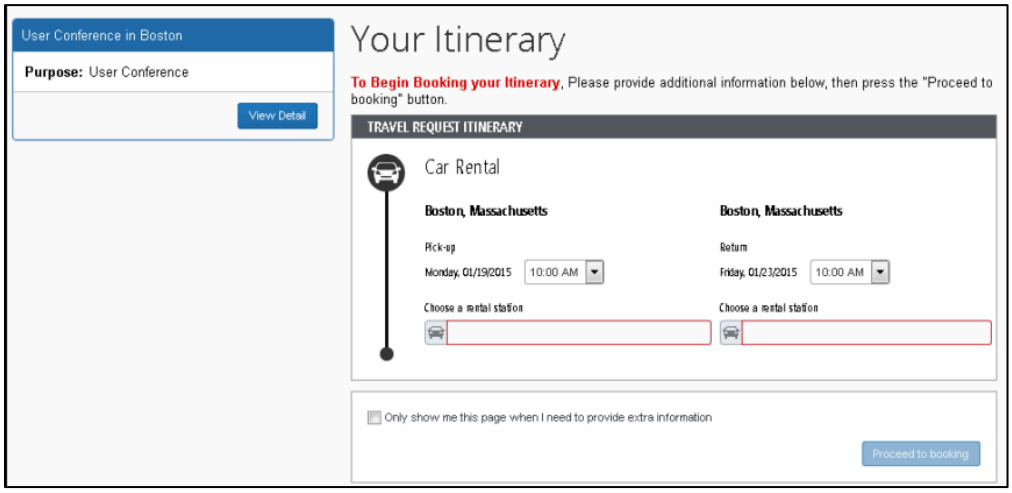
11. Click Confirm Booking to send your request to the travel agents.
12. The Finished! screen shows your confirmation number and information to contact the travel agent.



13. Click Return to Travel Center.

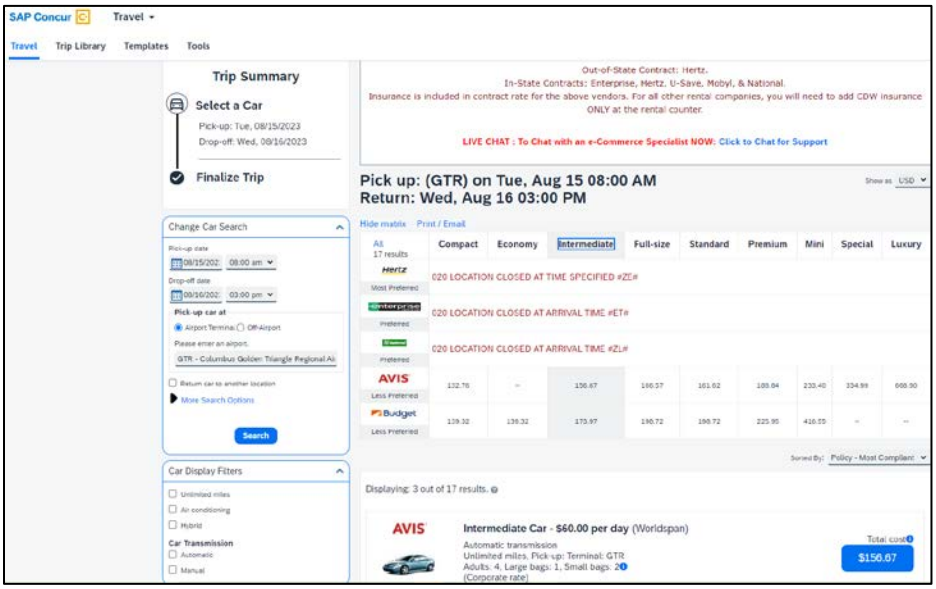
Book a Car

1. From your approved request, select the request that is now Pending On-line Booking. Click the **Book Travel** button in the Upper-Right hand corner of the request.
2. Within the **Travel Request Itinerary** section, complete the required fields.
3. Click **Proceed to Booking**.



4. On the Car Rental Search results page, filter the results (if desired). There are two sets of filters: one at the top of the page and one at the left side of the page.
   - **Left side of the page**: Use the show ⌄ and hide ⌃ arrows as needed.
     - In the **Change Car Search** area:
       - Change your pick-up and drop-off dates and times; change your pick-up location; change your drop-off location.
       - Expand **More Search Options** to select car type, vendors, etc.
       - Click **Search**. Travel displays the new results.
     - In the **Car Display Filters** area, select the desired options.
   - **Matrix - Top right side of the page:** Use the grid to filter the results.
     - The shaded column displays the type of car defined by MSU's travel policy.
     - To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
     - To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
     - To see cars of a particular size and a particular vendor, click the appropriate cell. The search results below will reflect that choice.

5. Sort the results (if desired).
    - Below the matrix is the **Sorted By** list. Select the desired sort option.
6. Review the results.



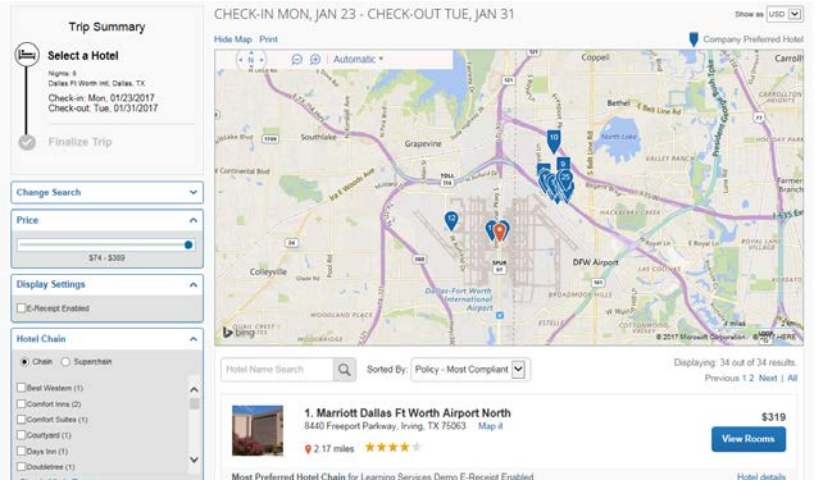
Notes:

- The ⚠ icon next to the price reflects an option that will trigger one or more company travel policy rules.
- Review the information boxes above the **Matrix** for information/policy on state-contracted vendors.
- Click the picture of the car (if available) to see a larger picture as well as passenger and luggage capacity.
- Click **Location details** for more information about the available options.

7. Select the desired rental car by clicking the blue button with the amount of the car rental you would like reserve.
8. The **Review and Reserve Car** page appears:
    - Review the details for accuracy.
    - Select a program if desired.
    - Select a method of payment, if necessary.
9. Click **Reserve Car and Continue**.
10. Your **Travel Details** page (itinerary) appears. Review the page and then click **Next**.
11. Continue through the booking process until the **Finished!** Screen appears and shows your confirmation number and information to contact the travel agent.
12. Click **Return to Travel Center**.

Book a Hotel Reservation

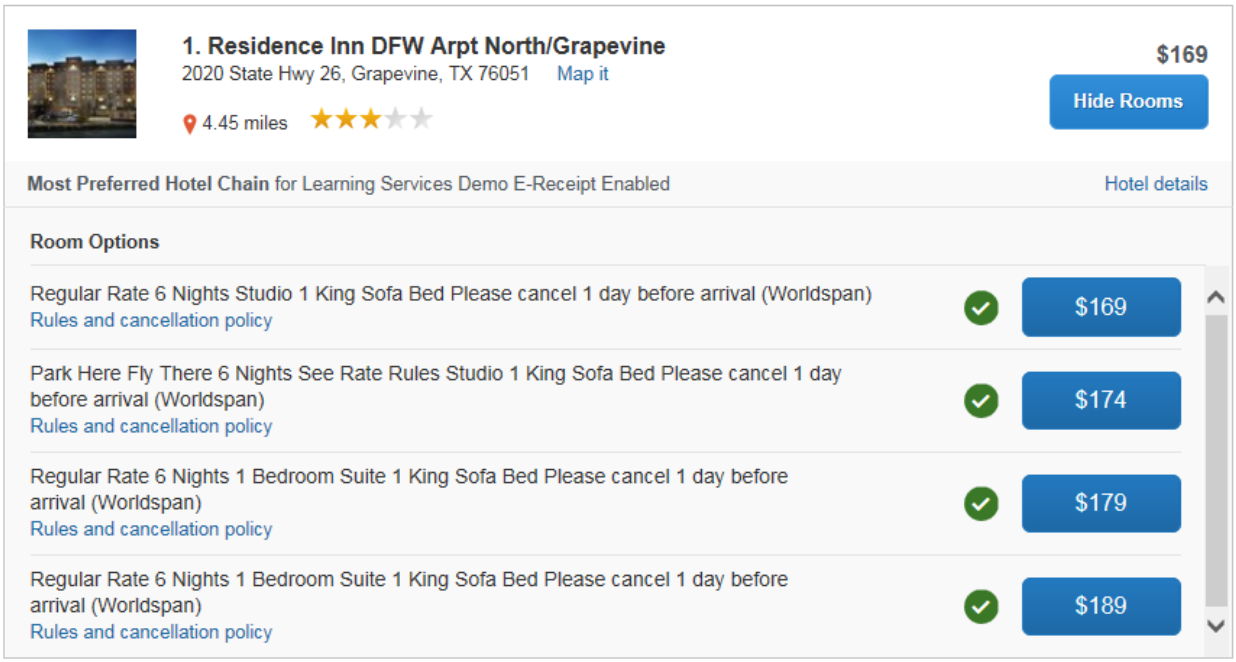
1. From your approved request, select the request that is now Pending On-line Booking. Click the **Book Travel** button in the Upper-Right hand corner of the request.
2. Click **Proceed to Booking**.
3. Change and filter your search (if desired)
   - There is a filter set on the left side of the page. Use show ⌄ and hide ⌃ as needed.
     - In the **Change search** area:
       - Change your check-in and check-out dates; change your hotel location.
       - Click **Search**. Travel displays the new results.
     - Use the slider in the **Price** area to narrow your search.
     - In the **Hotel chain** area, select the desired hotels.
     - In the **Hotel Amenities** area, select the desired options.
4. Review the hotel map (if desired).
   - Review the hotel map. Click any to see specific hotel information. Click, zoom, and move the map as desired.



5. Sort the search results (if desired)
6. Below the map, select from the **Sorted By** list to sort the results. Enter hotel names, if desired.
7. Review the results.
   - A picture as well as the name, address, rating stars, and price range appears.
     - Click the picture to see more images.
     - Click **Hotel details** to see contact information, street address, cancellation policy, and information about the facility.

- Click **View Room** to see:
  - The available rates
  - Other amenities per room/rate
  - Rate details and cancellation policy

8. Select the hotel room.
   - Click the **Cost** button next to the room that you want to reserve.



9. The Review and Reserve Hotel page appears. Navigate through the page and:
   - Review or modify the room preferences.
   - Verify or modify the guest and program information.
   - Review the price information.
   - Select a form of payment, if available, as defined by your company's configuration.
   - Review the rate and cancellation information.
   - Select the I agree to the hotel's rate rules, restrictions, and cancellation policy check box.
10. Click **Reserve Hotel and Continue**.
11. Your **Travel Details** page (itinerary) appears. Review the page and then click **Next**.
12. Continue through the booking process until the **Finished!** Screen appears and shows your confirmation number and information to contact the travel agent.
13. Click **Return to Travel Center**.

Creating an Expense Report Based on a Completed Trip

You can create an expense report based on a trip from the Upcoming Trips tab by clicking the **Expense** link in the **Action** column.

The Report Header will appear, and you will:

- Complete all required fields (indicated with a red asterisk *) and the optional field as directed by your company.
- Click **Next** or **Save**.

The expense report page appears. At this point you can add your out-of-pocket expenses and company card transactions.