



## QuickStart Guide

Concur® Premier: Travel



CORPORATE TRAVEL PLANNERS

*Travel. Events. Groups.*

A Branch of the Tzell Travel Group

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### **Concur® Premier: Travel QuickStart Guide**

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Published by Concur Technologies, Inc.  
18400 NE Union Hill Rd  
Redmond, Washington 98052

Printed in USA

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# Welcome to Concur Premier: Travel

Welcome to Travel, Concur's powerful employee travel management solution that enables you to create travel bookings online.

Concur's Travel feature enables you to:

- Search the same vendor inventory that your travel agency uses.
- Find, coordinate, and reserve your airline, rental car, hotel, rail, limo, or dining reservations for your business travel.
- Comply with your company's travel policy when booking your travel.

## Section 1: Log on to Travel

### How to...

1. Log on to Travel using the provided password that your institution has given you.

### Additional Information

Your password is case sensitive.

If you are not sure how to log on, check with your institution travel administrator.

## Section 2: Update Your Travel Profile

Before you use Travel for the first time, update your profile. You must save your profile before you first attempt to book a trip in Travel.

If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the Profile page).

### Step 1: Change Your Password

Your company decides if you can change your password. If allowed, you will change your password on the Profile tab.

#### How to...

1. On the **My Concur** page, select **Profile** from the menu at the top of the page.
2. On the **Profile** submenu, click **Change Password**.
3. In the **Old Password** field, enter your current (temporary) password.
4. In the **New Password** field, enter your new password.
5. Verify your new password by re-entering it in the **Re-enter Password** field.
6. Enter a word or phrase in the **Password Hint** field to act as a reminder if you forget your password, and then click **Save**.

#### Additional Information

If your company uses Single Sign On, you access Travel via your company's intranet. If that is the case, you will not see this option on the Profile menu nor will you be able to change your password. To change your password, you need to know your old or temporary password.

**Concur**

My Concur Travel Expense Invoice Reporting Administration **Profile**

Personal Information **Change Password** System Settings Mobile Registration Travel Vacation Reassignment System E-Mail Settings

**My Profile**

- Your Information**
  - Personal Information
  - Company Information
  - Contact Information
  - Emergency Contact
  - Credit Cards
- Travel Settings**
  - Travel Preferences
  - International Travel
  - Frequent-Traveler Programs
  - Assistants/Arrangers
- Expense Settings**
  - Expense Information

**Change Password**

A password must be at least 7 characters. It must contain numbers (0-9), and may contain 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.**

This will change your password in both Cliqbook and the Concur Expense system.

Old Password  New Password  Re-enter New Password

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

Submit Cancel

# Section 2: Update Your Travel Profile (Continued)

## Step 2: Change your Time Zone, Date Format, or Language

### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **System Settings**.
3. On the **System Settings** page, update the appropriate information, and then click **Save**.

### Additional Information

You can change the system and regional settings (number, currently, date, and time format).

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

The screenshot shows the Concur user interface. At the top, the Concur logo is on the left, and navigation tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile' are on the right. Below these, a secondary navigation bar includes 'Personal Information', 'Change Password', 'System Settings' (highlighted), 'Mobile Registration', 'Travel Vacation Reassignment', and 'System E-Mail Settings'. The main content area is titled 'My Profile' and contains a sidebar on the left with categories: 'Your Information', 'Travel Settings', 'Expense Settings', 'Invoice Settings', and 'Other Settings'. The 'System Settings' option is selected in the sidebar. The main content area is divided into sections: 'Regional Settings and Language' (with dropdowns for Default Language, Number Format, Placement of Currency Symbol, Negative Number Format, Negative Currency Format, Date Format, Time Format, Hour/Minute Separator, and Time zone), 'Calendar Settings' (with dropdowns for Start week on, Start Day View At, End Day View At, and Default View), 'Other Preferences' (with dropdowns for Home Page and Rows per page), and 'Travel Settings' (with a list of checkboxes for email notifications). At the bottom right, there are 'Save', 'Reset', and 'Close' buttons.

# Section 2: Update Your Travel Profile (Continued)

## Step 3: Update Your Personal Information

### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **Personal Information**.
3. On the **My Profile** page, update the appropriate information, and then click **Save**.

### Additional Information

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

Complete these sections of your travel profile:

- Name & Airport Security
- Home Address
- Work Address
- Contact Information
- Emergency contact
- Travel Preferences
- Credit Cards

You must complete all fields marked **Required** (in orange) to save your profile.

Verify that the first and last name fields match the ID used at the airport.

If you cannot edit these fields, contact your travel agency or travel manager to make changes.

The country you select in the work address fields will determine the default map that appears on the **Concur Travel Map** tab.

There are several **Save** buttons on the profile page. You only need to save once as every **Save** button saves the entire profile.

The screenshot shows the 'My Profile' page with a sidebar on the left containing navigation links for 'Your Information', 'Travel Settings', 'Expense Settings', and 'Invoice Settings'. The main content area includes a top navigation bar with links for 'Home Address', 'Work Address', 'Contact Info', 'Emergency Contact', 'Travel Preferences', 'Assistants', and 'Credit Cards'. Below this is a search bar and a 'Change Picture' button. A red warning box states: 'Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.' The form fields include: Title (dropdown), First Name [Required] (text, value: Kevin), Middle Name (text, value: John), Nickname (text), Last Name [Required] (text, value: Dorsey), and Suffix (dropdown). There is a checkbox for 'No Middle Name'. Below these are fields for 'Concur Cost Center' (value: 8512) and 'Company Information' which includes 'Employee ID' (value: 100030), 'Exchange Login' (text), 'Manager' (value: Brenna Calnan), 'Position/Title' (value: Training Consultant), and 'Org. Unit/Division' (dropdown).

## Section 2: Update Your Travel Profile (Continued)

### Step 4: Set Up a Travel Arranger or Assistant

#### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** dropdown menu, click **Personal Information**.
3. Click **Assistants** at the top of the page.
4. Click **Add an Assistant** to search for your assistant's last name.
5. In the **Search Criteria** field, enter the assistant's name.
6. Click **Search**.
7. Click the **Assistant** dropdown arrow.
8. Select the appropriate name from the dropdown list.
9. Select **Can book travel for me**.
10. Select **Is my primary assistant for travel**.
11. Click **Save**.

#### Additional Information

Use **Assistants & Travel Arrangers** to give other Travel users the ability to view and modify your profile or book travel and trips for you.

The primary assistant's name and work phone number become part of the traveler's GDS profile, if configured.

**Important:** Your assistant must have an existing Travel account before you can add him or her to your profile.

**Hint:** When searching, use the following format: *LastName,FirstName* (no spaces).

For example: Smith,June

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to have this assistant included on any agency-generated emails about your trips. This will only occur if your Travel Management Company has configured your site to send information to your GDS profile.



# Section 3: Make a Travel Reservation

## Step 1: Make a Flight Reservation

### How to...

1. On the **My Concur** page, click the **Flight** tab at the left side of the page.
2. Select one of the following types of flight options:
  - Round Trip
  - One Way
  - Multi-Segment

The screenshot shows a flight reservation form with the following fields and options:

- Flight** tab selected, with other tabs: Car, Hotel, Taxi, Rail, Flight Status, Dining.
- Radio buttons for **Round Trip** (selected), **One Way**, and **Multi-Segment**.
- Departure City**: MSP - Minneapolis St Paul Intl - Minneapolis, MN (MSP).
- Arrival City**: (empty field).
- Departure**: depart, 9:00am, ± 3.
- Return**: depart, 5:00pm, ± 3.
- Checkboxes:  Pick-up/Drop-off car at airport,  Automatically reserve this car,  Find a Hotel.
- Checkboxes:  Specify airline,  Refundable only air fares.
- Number of adults**: 1.
- Class of service**: Economy class.
- Search flights by**: Price (selected), Schedule.
- Flights w/ no double connections**: .
- Search** button.

3. In the **Departure City** and **Arrival City** fields, enter the cities for your travel.
4. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.
5. If you need a car, select the **Pick-up/Drop-off car at Airport** checkbox.

### Additional Information

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

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

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

Depending on your company's configuration, you can automatically reserve a car, allowing you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.

If you need an off-airport car or have other special requests you can make these requests on the **Car Results** page or you can skip this step and add a car from the **Itinerary** page.

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

### How to...

6. If you need a hotel, select the **Find a Hotel** checkbox.
7. If also booking for a companion, from **the Number of Adults** dropdown menu, select the number of adults traveling.
8. To search only fully refundable fares, select the **REFUNDABLE only** checkbox.
9. Select **Search flights by Price** or **Schedule**.
10. Click **Search**.

### Additional Information

You can choose to search for the hotel by:

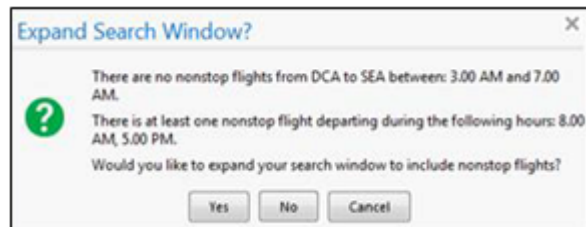
- Airport
- Address
- Company Location
- Reference Point / Zip Code (a city or neighborhood)

If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel from the **Itinerary** page.

Your company decides if this field appears in the Trip Search section. When displayed, if a companion is selected, the payment screen will provide the option to use the credit card from the companion's profile.

The forward tab that you see on the search results screen will depend on which you select.

Depending on your company's configuration, you might be notified that there are non-stop flights, but they don't exactly fit the times you have entered. If you want, you can change your search criteria to include non-stop flights.



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 right. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

You can also click the **more like this** link, and then select either **Outbound flight** or **Return flight** to view more options for the selected flight.

# Step 1: Make a Flight Reservation (Continued)

## How to...

- Review the search results on the **Shop By Fares** tab, and then click **Show Details**.
  
- Select any green (unoccupied) seat and position the mouse pointer over a seat to see the seat number.

## Additional Information

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.

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

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.

http://rqa3-cb.outtask.com/twPopup/popup\_seatmap.asp?airv=A5&fltnum=660&bic=V&startdt=2010-12-27&numseats=1&startcity=SEA&endcity=DFW

**Seat Map**

**Alaska Airlines** Flight: 660 Boeing 737-900  
 Seattle Tacoma Intl Arpt (SEA) - Dallas Ft Worth Intl (DFW)  
 12/27/2010  
 Seat Selection:

Select Seat Close

F	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
E	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
D	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
C	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
B	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
A	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

Seat assignment is subject to change up until time of departure

- Available seat
- Occupied seat
- Preferential seat
- Exit row
- Selected seat

Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status.

# Step 1: Make a Flight Reservation (Continued)

## How to...

- Click the appropriate seat to select it, and then click **Select Seat**.
- Once you have made your seat selection, click **Close**. Repeat for all flights.
- From the **Shop By Fares** tab, click **Reserve** to select your airfare.

## Additional Information

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.

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. Yellow buttons will not appear if your company uses Concur Standard.
- 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.

The screenshot displays the Concur flight reservation interface. At the top, there are navigation tabs: My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below these are sub-tabs: Home, Trip Library, Templates, Meetings, Meeting Admin, Policy, Profile, Tools, and Cliqbook XA. The main heading is "Seattle, WA To Dallas, TX Nov 22 - Nov 25".

On the left, there is a "Baggage Fee Policies" section with a "Hide matrix" link. Below this is a table of carrier options:

Carrier	United	Alaska Airlines	American	Multiple Carriers	Frontier	Airtran Air	US Airways
All	88 results	..	..	..	..	..	..
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

Below the carrier table is a "Shop by Fares" section with a "Shop by Schedule" tab. It shows "Sorted By: Policy - Most Compliant" and "Displaying: 88 out of 88 results." There are navigation links: "<< Previous", "Page: 1 of 9", "Next >>", and "All".

The main results table has columns: Price, Carrier, Depart, Arrive, and Stops / Duration. Three results are shown, all for Alaska Airlines with a price of \$364.10 and a green "Reserve" button:

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

On the right side, there is a "Change Flight Search" panel with sliders for Outbound and Return flights, a "Price" section with a currency dropdown (USD \$) and a price range slider (\$317.40 - \$608.02), and a "Display Settings" section with a checkbox for "Hide Non-refundable Fares".

# Section 3: Make a Travel Reservation (Continued)

## 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.

Depending on your company's configuration, you might be able to select **In-car GPS system** or **Ski rack** under **Car booking options** on the right. Other preferences or car program ID numbers can also be added.

Picking up the car at: (DFW) on 10/18/2010 12:51 PM Print / E-mail  
 Returning on 10/19/2010 6:55 PM Hide matrix

All 34 results	Economy Car	Compact Car	Intermediate Car	Full-size Car	Standard Car	Intermediate Car Hybrid
	45.00	45.00	46.00	48.00	48.00	--
	38.00	40.00	42.00	44.00	43.00	--
	43.00	43.00	44.00	46.00	46.00	--
	60.76	60.76	--	64.09	61.87	119.63
	53.00	53.00	56.00	60.00	58.00	--
	53.00	53.00	55.00	59.00	57.00	--

Displaying: 7 out of 34 results.  
 Sorted By: Policy - Most Compliant

**Economy Car** (Worldspan) E-Receipt Enabled

**\$45.00** per day (Corporate rate)  
 Unlimited miles  
 Automatic transmission  
 Total cost **\$132.59\***

[Reserve](#)

**Economy Car** (Worldspan)

**\$38.00** per day (Corporate rate)  
 Unlimited miles  
 Automatic transmission  
 Total cost **\$114.79\***

[Reserve](#)

**Car booking options**

In-car GPS system    Ski rack

Other Car Preferences:

Use the following Car Program:  

[+ Add car Mileage Program](#)

Use my default credit card: 'My Corporate Credit Card'.

**Change Car Search** ⏪

**Car Display Filters** ⏷

Choose currency: USD \$

Unlimited miles

Air conditioning

Hybrid

Car Transmission

Automatic

Manual

## Section 3: Make a Travel Reservation (Continued)

### Step 3: Select a Hotel

#### How to...

1. If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results appear after you choose your rental car.
2. To filter by hotel chain, enter the chain name in the **With names containing** box next to the **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.
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

You can sort the list of hotels by **Preference**, **Price**, **Rating**, **Distance** and **Policy**.

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.

To filter by multiple chains, in the **Hotel chain** box on right, click **hide all** and then select only the 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.

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. Yellow buttons will not appear if your company uses Concur Standard.
- 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 from the agency system.

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

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

## Step 3: Select a Hotel (Continued)

Check-in Mon, Oct 18 - Check-out Tue, Oct 19 Hide Map Print / E-mail

Map | Satellite | Hybrid

Hotel Preferences

Room Type: Don't Care | Smoking Preference: Don't Care

Foam pillows  Rollaway bed

Crib

Other Hotel Preferences:

Use my default credit card: 'My Corporate Credit Card'.

Change search <

Price <

Display Settings <

Neighborhood <

Hotel chain <

Hotel Amenities <

Sorted By: Preference | With names containing:

Displaying: 71 out of 71 results. <<Previous | Page: 1 of 8 | Next>> | All

	Embassy Suites Dallas - DFW Airport North ...	2.24 miles	\$209
	2401 Bass Pro Drive Grapevine, Texas 76051	★★★★☆	\$379
	E-Receipt Enabled	<a href="#">more info</a> <a href="#">compare</a>	<a href="#">view rates</a>
	Sleep Inn DFW North	1.94 miles	\$48
	Hackberry Creek 4770 Plaza Drive Irving, Texas 75063	★☆☆☆☆	\$82

## Step 4: Complete the Reservation

### How to...

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. Click **Purchase Ticket** to finalize your trip.

### Additional Information

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

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.

You will see the name and itinerary, along with the quoted airfare amount.

# Section 4: Cancel or Change an Airline, Car Rental, or Hotel Reservation

## How to...

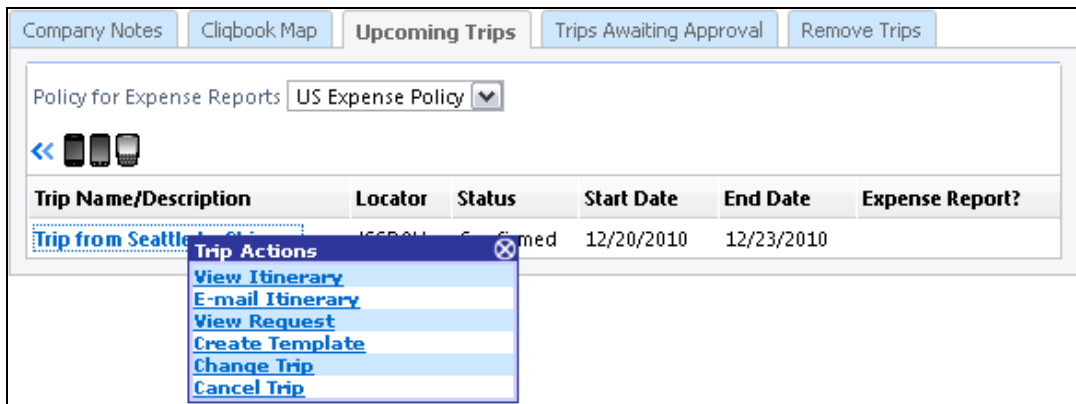
1. At the top of the **My Concur** page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

## Additional Information

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 your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.



3. From the **Trip Actions** menu, click **Change Trip**.
4. On the **Itinerary** page, select the portion of the trip you want to change.

From the **Itinerary** page, you can:









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

5. To cancel your entire trip, click the **Upcoming Trips** tab
6. From the **Trip Actions** menu, select **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.



## Section 5: Travel Action Buttons and Icons

Button/Icon Description	
	<b>Airfare:</b> Click to view your airfare booking information.
	<b>Car Rental:</b> Click to view booking information for your car rental.
	<b>Lodging:</b> Click to view your lodging booking information.
	<b>Multiply:</b> Reverses the exchange rate when working with foreign out of pocket transactions.
	<b>Rail:</b> Click to view your rail booking information.
	<b>Reserve:</b> Reserves the selected trip details.
	<b>Seat map:</b> Click to view the flight seat map.
	<b>Yellow Diamond:</b> Indicates a company preferred vendor.

Assistants & Travel Arrangers.....	10	Completing .....	17
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