


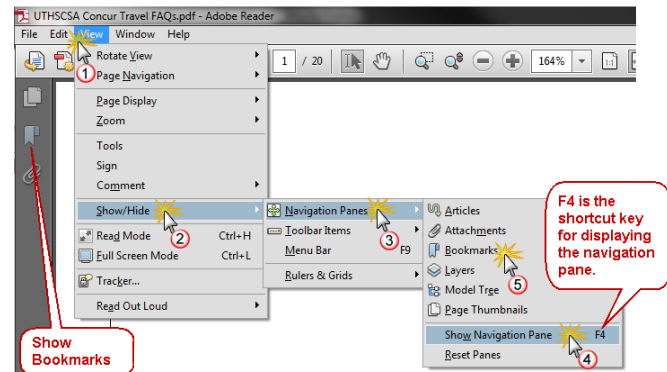
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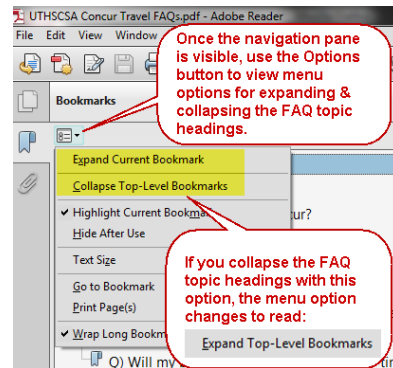
### Navigation Tips for Reading these FAQs in Adobe Reader

1. To see a list of the questions for each FAQ topic shown above, turn on the navigation pane in Adobe Reader by pressing the **F4** key. **F4** also toggles the pane open and closed. When the navigation pane displays, click on the Bookmarks icon .

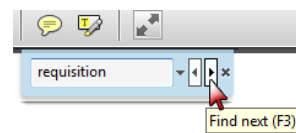
2. You can alternatively use the menu navigation steps shown below to display the navigation pane and show bookmarks.



3. To expand/collapse the FAQ topic headings in the navigation pane, use the Options button .



4. Press **CTRL + F** to open the search box in Adobe Reader. Enter a search phrase and click the **Find next** button. Press **F3** to continue searching for the same phrase.





## UTHSCSA - Frequently Asked Questions

### About Concur

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#### Q) What is Concur Travel?

Concur Travel is an online booking tool which a traveler (or his/her travel arranger) can use to research and book flights, reserve rental cars, and make hotel reservations 24 hours a day, 7 days a week using one's desktop browser. Concur stores the traveler's profile and travel preferences which are automatically applied at the time travel reservations are made. Concur also stores travel itineraries, trip history, and electronic receipts.

#### Q) What organizations use Concur?

Our university began using Concur in March 2014. Concur is being used across the UT System and by many top companies in all sorts of industries.

#### Q) Who at our university needs to use Concur?

Concur will be used by any employee who travels (or is anticipated to travel) on university business outside of the employee's headquarters city. Concur will also be used by employees who routinely make travel arrangements for another employee(s).

### Registration and Access

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#### Q) How do I register for Concur Travel?

Before registering for Concur, employees should begin with the *Concur Quick Start Guide*, which is available at <http://ut-ctp.com/uthscsa/>, our university's dedicated webpage on a site hosted by Corporate Travel Planners. The *Concur Quick Start Guide* provides a brief overview of the registration process, as well as an overview of how to use Concur. The self-registration procedure is covered in detail in the *Concur Quick Reference Guide*. Page 1 of this guide will step you through the creation of your Concur account, and explain how to update your Concur profile. Your UTHSCSA email address will be used for your Concur user name.

#### Q) How long does it take to register?

Registering and setting up one's profile in Concur takes just a few minutes. If an employee has an extensive number of frequent flier/traveler programs, these do not have to be set up when initially creating a travel profile. Employees can start by creating a basic profile and then revise it at their convenience, as often as needed. The profile should be completed in its entirety prior to an employee's next trip.



## UTHSCSA - Frequently Asked Questions

### Q) How do I access Concur again after registering?

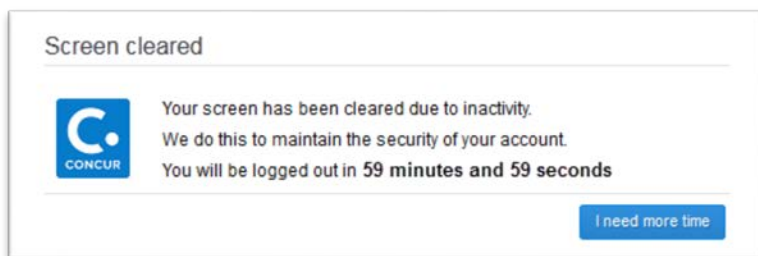
Use your browser to go to: <https://www.concursolutions.com/>. You can also access Concur from the *Online Booking Tool* link on the left side of the university's page on the Corporate Travel Planner's website. The URL for this page is <http://ut-ctp.com/uthscsa/>.

### Q) Is VPN required to access Concur?

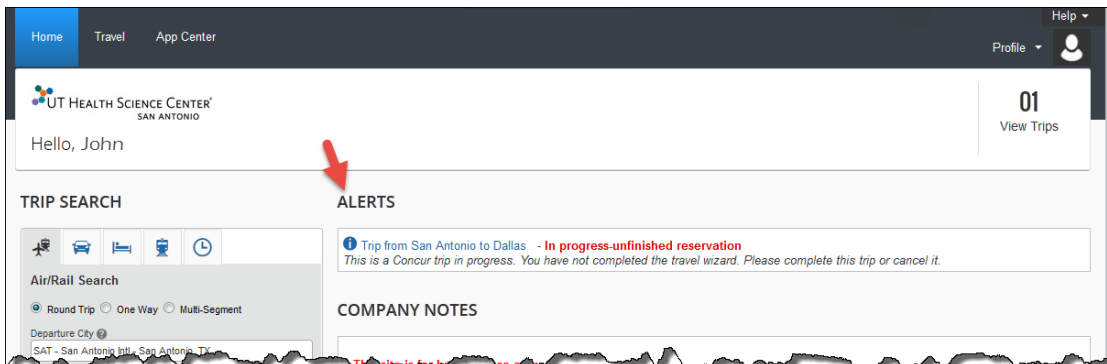
No. Concur is a hosted system accessible 24 hours a day, 7 days a week, using an internet browser. There is also a mobile version of Concur for smartphones and tablets, but you should begin with the web version using your desktop browser. There are some features of Concur (such as profile maintenance) that are not accessible using the mobile version.

### Q) Will my browser session running Concur time out?

Yes. After an hour of inactivity, your Concur session will be overlaid with a message similar to the one appearing below. Concur will then begin a 60 minute countdown after which your Concur session is disconnected. To prevent disconnection, just click the [I need more time](#) button at the bottom of the message. As long as you do so before the countdown clock has expired, your work will not be affected.



However, after the 60 minutes expires, your Concur session will close and the Concur login will display. Whether any work is lost depends on where you were in the booking process when your session was disconnected. If Concur managed to save your trip, when you next login to Concur you will an *Alerts* section at the top of the Concur Home page. See below. Click on the trip name to continue.





## First Time Login and Creating a User Profile

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### Q) What should I do the first time I login to Concur Travel?

You should update your Concur profile. Your profile drives much of what happens in Concur, so you must update and save your profile before your first attempt to book a trip in Concur. For more information about updating your Concur profile, see page 1 of the document titled *Concur Quick Reference Guide* at <http://ut-ctp.com/uthscsa/>.

### Q) Will every HSC employee need to have a Concur profile?

In general, a Concur profile will be needed for:

- any employee who expects to travel on university business to a destination outside of the employee's headquarters city
- any employee who arranges travel on behalf of another university employee

### Q) What are the required fields on the profile page?

The required fields on the **Profile** page appear with text **[Required]** next to the field. Each of the following sections has one or more required fields:

- **Your Name and Airport Security** – You must enter a Middle Name. If you do not have one, check the box labeled *No Middle Name*. First and last name cannot be edited. If either is incorrect, send email to: [concuradmin@uthscsa.edu](mailto:concuradmin@uthscsa.edu) to request corrections.
- **Contact Information** – Work phone and home phone are required in this section.
- **Travel Preferences** – Gender and Date of Birth (at the bottom of this section) are required.

Note: Under *Air Travel Preferences*, the **Preferred Departure Airport** is an important field. Although it is not required, it is a good idea to enter a value in this field. Doing so will save time for you (or your travel assistant) since it causes the departure airport to automatically populate on the Air/Rail tab in Concur. San Antonio employees would enter **SAT**; employees in Harlingen would enter **HRL**.

**Air Travel Preferences**

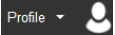
Seat: Window | Special Meals: Regular Meal | Ticket Delivery: E-ticket when possible

Preferred Departure Airport: SAT - San Antonio Intl - San Antonio, TX

**OR**

Preferred Departure Airport: HRL - Rio Grande Valley Intl Arpt - Harlingen, TX

### Q) Where do I update my email address in my profile? Can I specify more than one?

Click  at the top left of the Concur window, then click **Profile Settings**. From the menu on the left side of the page, click **Email Addresses**. You should already see your UTHSCSA email address, which is populated by the registration process. You can add two additional email addresses. To add an email address, click **[+] Add an email address** at the far right. At the time you add an email address, you can designate whether the email address should be also be a contact for travel notifications.

### Q) What do I do if I change my name or my UTHSCSA email address?


Your UTHSCSA email address is used as your Concur account name, and your Concur account also stores your UTHSCSA email address as the default for notifications. If you change your legal name (typically due to marriage or divorce), it is common for you to request a change to your UTHSCSA email address. Your Concur account can be renamed, and at the same time, your email address can be revised. Send email to: [concuradmin@uthscsa.edu](mailto:concuradmin@uthscsa.edu) to request these corrections.

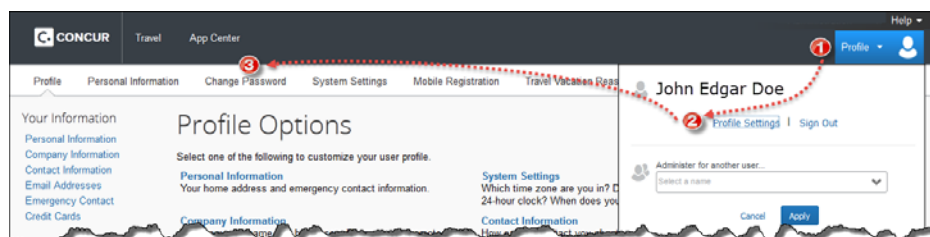
### Q) Will my password for Concur expire?

No.

### Q) How do I change my password?

During the registration process, you will create a permanent password for Concur, as well as a password hint. If you need to change either at any time, follow these instructions:

1. From the Concur Home page, click .
2. Click **Profile Settings**.
3. Click **Change Password**.



4. The *Change Password* box will appear. Change your password and/or your password hint. When you're done, click the **Submit** button.

### Change Password

A password must be at least 7 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.**

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

Strong

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

Name of my first grade teacher



## Using a Travel Assistant

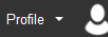
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### Q) Can a UTHSCSA employee use Concur to book official university travel on behalf of another employee?

Yes. Concur refers to this as a travel assistant / arranger.

### Q) What if I do not book my own travel?

In Concur Travel, you should designate an assistant. Besides making travel arrangements for you, your assistant can also update your profile if it becomes necessary. To set up an arranger, follow these steps:

1. On the Concur menu, click  and then click the **Profile Settings**.
2. From the menu options on the left, click **Assistants/Arrangers**.
3. At the far right, click **[+] Add an Assistant**
4. In the *Assistant* box, begin typing the last name of the person whom you would like to authorize to make travel arrangements for you.
5. From the list of names that appears, click on the correct name. (If you do not see your travel arranger in the list of people to select from, that individual might not have created a Concur account yet. Your travel arranger must have created his/her Concur account and profile before you can designate him/her as your assistant.)
5. Check the box "Can book travel for me". If appropriate, also check the box "Is my primary assistant for travel".
6. Click the **Save** button.

### Q) Can an employee let someone else set up the Concur profile?

No. Each employee needing to use Concur must register for Concur and, at a minimum, complete a basic travel profile (completing at least the required fields in the profile). In addition, the election of e-receipts can only be done by the employee/traveler. If the employee designates a travel assistant in Concur, his/her assistant can then complete other portions of the profile (such as travel preferences and frequent flier/traveler programs). The employee's Concur assistant can also update the travel profile as changes need to be made.

### Q) What if I do not want to designate a travel assistant?

If you have not historically made your own travel arrangements for official university travel, you should first consult with your supervisor or departmental administrator to determine if you, or a travel assistant, should handle your travel bookings in Concur. Even if your department requires you to designate a travel assistant to handle your bookings, you can still use Concur to research your travel plans and to make sure you are getting the best deal for your travel dollars. You can compare the discounted flights in Concur with Internet fares and other alternatives (example: Expedia, Travelocity, and airlines' websites) so you can be sure you are finding the best travel deals.



## UTHSCSA - Frequently Asked Questions

### **Q) Will Concur allow employee “A” to make reservations and employee “B” to complete the booking?**

Yes, but employee A must have designated employee B as his/her Concur assistant. If employee A makes the reservations, the trip reservations can be placed on hold in Concur. Concur will hold an airfare quote for up to 24 hours; the actual expiration time for a quote is dictated by the selected fare. Bear in mind that you don't want to “start the clock” to hold an airfare quote without taking into consideration processing time for the PeopleSoft travel requisition. You or your Concur assistant will need time to get the PeopleSoft travel requisition created to authorize the trip, and the requisition number is needed to complete the booking of the travel in Concur.

Here's one way to handle a travel reservation in Concur without placing the trip on hold. Employee A could research fares in Concur, reserve the fares, email the itinerary directly from Concur to a travel assistant (and perhaps even employee A's supervisor). Then, employee A could cancel the reservation directly from the Concur itinerary. The assistant would then have the necessary travel details and estimates to create a PeopleSoft travel requisition and forward it for approvals. Afterwards, the assistant could make the travel reservations in Concur for employee A.

Note that if employee A's supervisor were to let the assistant know that the travel details and costs are acceptable, the assistant could complete the booking in Concur while the requisition is still waiting to be approved. Concur only requires the requisition number, not an approved requisition.

## **Policy**

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### **Q) How will I know if a fare in Concur complies with university policy?**

All fares in Concur comply with University policy. Some examples of fare classes you won't find in Concur are first class and Southwest Airlines' business select.

The *price* of some fares in Concur may be more in compliance than others. In Concur, you will notice that the Select button is sometimes green and sometimes yellow. A *green* Select button indicates a fare that is considered to be a *least cost logical airfare*, which means the fare is within \$100 of the least cost airfare available. When an airfare exceeds the least cost logical airfare by more \$100, the Select button will be *yellow*. When you click a yellow Select button, Concur will display a box asking you to provide a justification for choosing the higher cost flight.

The same green/yellow color scheme is used in Concur for the Fares button. Sometimes you'll see a Fares button where the Select button normally appears. This indicates that there are multiple fare classes for the flight. Click the Fares button to expand the flight details. You will need to select a fare from the available fare types. You will then click on the Select button at the bottom right of the flight details.



## UTHSCSA - Frequently Asked Questions

### **Q) What if I can find a fare cheaper than what I find in Concur?**

In general, UT System mandates use of the contract travel agencies for airfare purchases; however, an exception is made if you can find a fare from an alternative source that is *less than or equal to* the cost of a *comparable* fare found in Concur (or obtained from one of the contract travel agencies). Before you can purchase the ticket from an alternative source, you should seek advance approval from the department approver for your travel requisition.

You should keep in mind that when you don't use Concur or the university's contract travel agencies, the travel agencies cannot provide you with customer support for your purchase. In addition, you must also pay for the travel fares up front and wait until you return from your trip to be reimbursed. In addition, you will be required to substantiate your alternative fare purchase with documentation.

Other exceptions to the general requirement to use the contract travel agencies for airfare purchases are: (1) Travel paid by a third party; (2) Unplanned emergency situations; and (3) Meeting/conference rates or discounts on airfare that cannot be accessed by the UT travel agencies or by Concur.

### **Q) What documentation is required to substantiate the purchase of airfare from a source other than Concur or the contract travel agencies?**

The alternative fare you find must be compared with a substantially identical fare found in Concur (or obtained from a contract travel agency). The fares being compared must be for the same travel dates, route, and fare class. As an example, you can't compare a non-stop flight in Concur to a fare from another source that is based on connecting flights, or to a direct flight (where you have a layover but remain on the same airplane).

To document your alternative airfare purchase, obtain a written quote from the alternative source (usually via email). Then, obtain a quote from Concur, or from the university's travel agencies. Concur lets you email an airfare quote to yourself (or to your travel assistant) directly from Concur. If you rely on a contract travel agency for a quote, ask the agent to email it to you. The date on the emailed quotes will be used to substantiate that you obtained the quotes on the same date. The quotes you received should be attached to the travel voucher that the department prepares to reimburse your travel expenses.

### **Q) When an employee transfers or terminates, how will the employee's Concur access be disabled?**

The employee's Concur account is tied to the employee and in no way to any department or project ID. Therefore, if an employee *transfers* from one department to another, there is no need for the employee's Concur account to be disabled. If the employee *terminates* employment with the university, the departmental ACE should send email to [ConcurAdmin@uthscsa.edu](mailto:ConcurAdmin@uthscsa.edu). Include in the email the employee's name and email address and the date by which the employee's Concur access should be disabled.

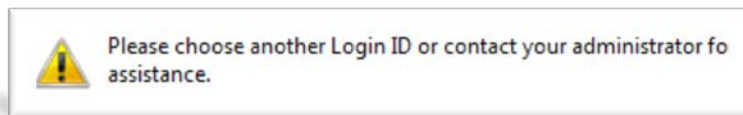
### **Q) When a former employee is rehired, how will the employee's Concur access be re-enabled?**





## UTHSCSA - Frequently Asked Questions

If an employee is rehired, the employee may not be certain if he/she has a Concur account. Simply have the employee register for a Concur account. If an account already exists, Concur will respond with the following message:



If this message appears, the departmental ACE should send email to [ConcurAdmin@uthscsa.edu](mailto:ConcurAdmin@uthscsa.edu) to request reactivation of the employee's Concur account. Include in the email the employee's name and email address and the date by which the employee's Concur access should be reactivated. (**Note:** If the employee has had a name change between termination and rehire, see the FAQs under the topic *First Time Login and Creating a User Profile*.)

### **Q) Could the traveler rather than a travel assistant be allowed to complete the booking (i.e. purchase the airline tickets)?**

It is certainly possible with Concur, but this is a policy decision that each department needs to make. There are no "security roles" in Concur that dictate that a user can only research travel options. So, a travel arranger could create the travel requisition and provide the traveler with the requisition number, project ID, and department ID to enter in Concur, after which the traveler could complete the ticket purchase. On the other hand, some departments may feel that travel arrangers are in a better position to complete the purchase of airline tickets since they routinely make travel arrangements, and consequently, they may have more experience with the intricacies of travel and university travel policies. The travel arranger is also often the employee who creates the travel requisition (an activity that has to be coordinated with the travel booking). If this approach is used, to complete the booking in Concur, the travel arranger must be designated in Concur as an assistant/arranger for the traveler.

## Reserving and Booking Travel for Employees

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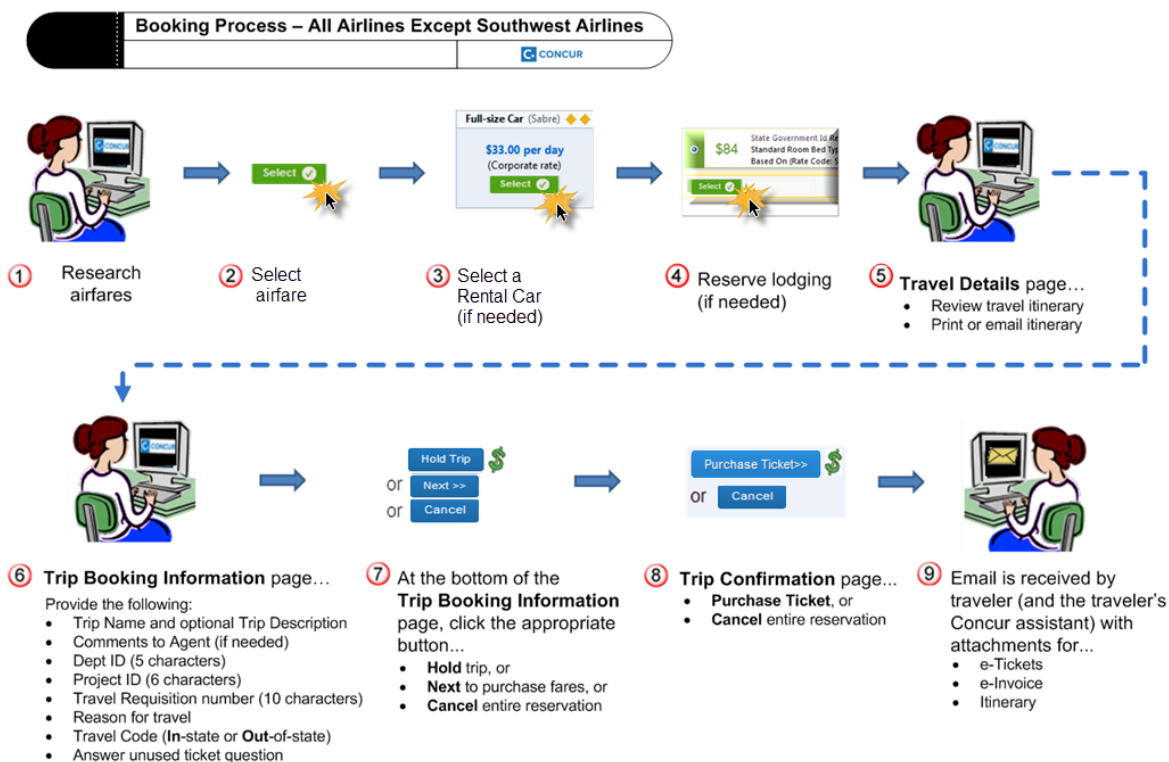
### **Q) What does the process of reserving and booking travel look like in Concur?**

The diagram below illustrates the typical process for all airlines **except** Southwest Airlines (which is discussed in the next FAQ). When you book a trip in Concur, the entire process can be completed without any intervention from the travel agency with one exception—when you need to apply an unused ticket.

For a booking completed in Concur, it is not until either step 7 or step 8 in the booking process that the university will incur a transaction fee (represented by the 💰). If you never place your trip on hold, a transaction fee won't be assessed until you get to step 8 and click the [Purchase Ticket>>](#) button. For more information about Concur's fees, see the FAQ section *Costs/Benefits of Concur*.

If you have multiple personal credit (and/or debit) cards associated with your profile and you don't specify a default card for hotel reservations in your profile, Concur will display the *Trip*

*Payment Information* page after reserving your lodging in step 4. On this page, you (or your travel assistant) will need to select which card to use to confirm your lodging accommodations.

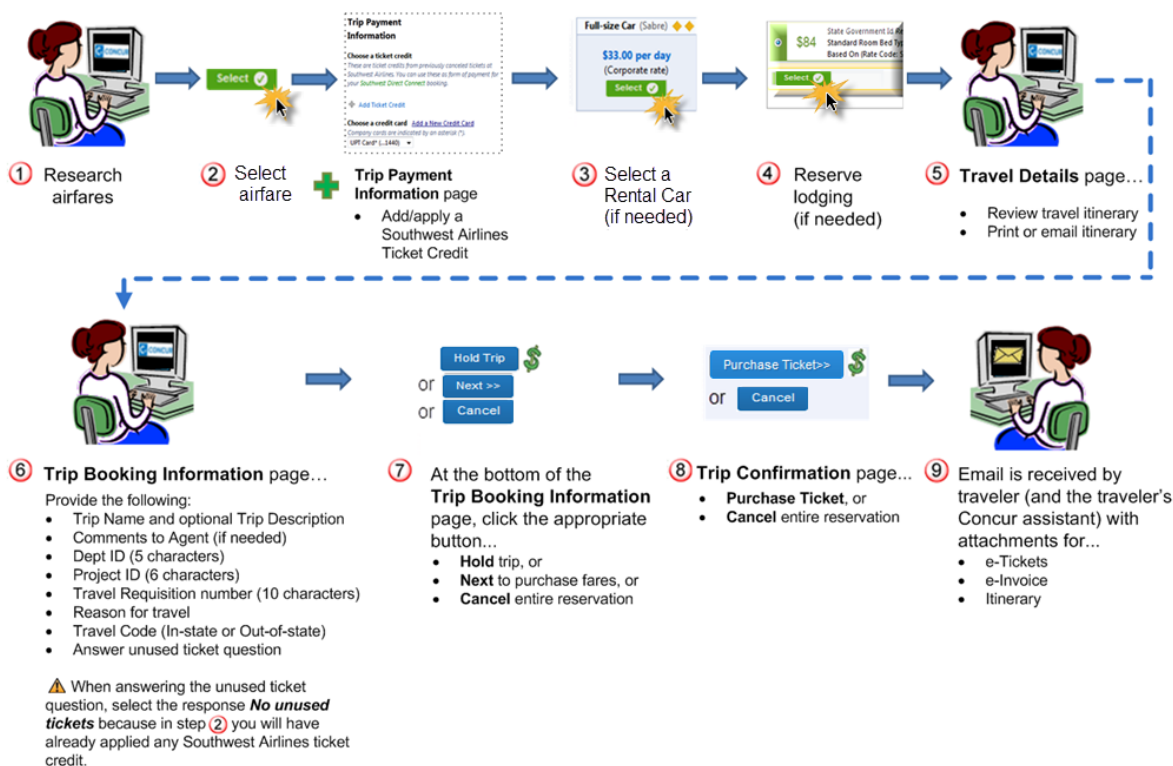


### Q) How is the booking process in Concur different for Southwest Airlines?

It is essentially the same, but Southwest Airlines adds a slight twist to steps 2 and 6. In step 2, after you click the **Select** button, you should see the **Trip Payment Information** page. On this page you can apply a Southwest ticket credit yourself instead of relying on the travel agency. Concur will check to see if you have already added a Southwest ticket credit to your Concur profile; however, if you have a ticket credit and you haven't yet added it to your Concur profile, you can do this in step 2.

When you reach step 6, you will need to answer the unused ticket question on the **Trip Booking Information** page. With Southwest Airlines, you should select "No unused tickets" since you're able to apply any ticket credit yourself during step 2.

## UTHSCSA - Frequently Asked Questions



### Q) What is the difference between reserving and booking in Concur?

It can be useful to think of Concur as your personal travel agent. Concur interacts with the reservation systems of airlines, rental car agencies, and hotel chains and shops for the best fares available. When you *reserve* airfare (or a rental car or hotel), Concur adds these items to your travel itinerary—sort of like putting them into your shopping cart—but, much more is happening. Concur also confirms your reservation in real time to prevent someone else from getting your fares.

When you get to step 7 (refer to the illustration for the previous FAQ) you have several options. You can place a hold on your reservations, cancel your entire reservation, or advance to step 8 and complete your purchase. If you purchase the airfare, you are completing a booking. So, you can generally equate *booking* with *buying* a fare.

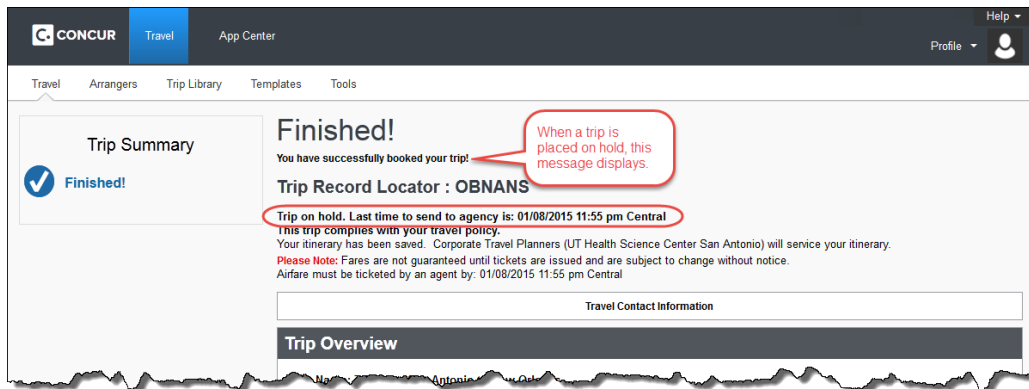
If you instead choose in step 7 to place a hold on your reservations, this is where Concur blurs the line between reserving and booking. Concur responds with a message, as shown in the illustration below, that *You have successfully booked your trip!* However, when your selections are placed on hold, a purchase still hasn't taken place. So, you can think of a hold as putting your selected fares on layaway. Concur will hold your reservations, but you must return to Concur to complete your purchase before the hold expires.

A hold *typically* lasts for 24 hours, but sometimes less. The fare you select determines how long Concur can hold your reservation. Concur will always advise you how long a reservation

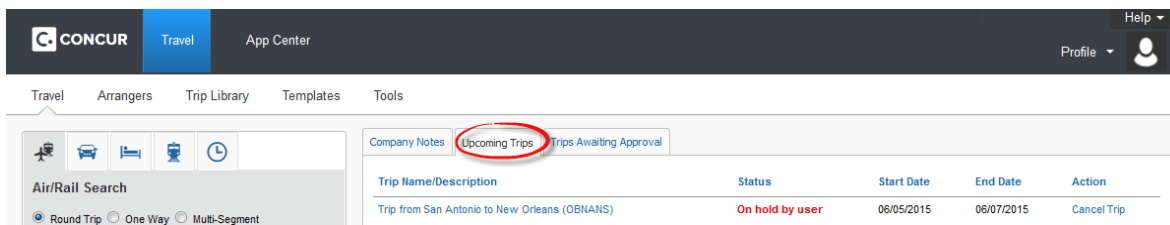


## UTHSCSA - Frequently Asked Questions

can be held (see illustration below). If you do not complete your booking (i.e. purchase the fare) before the hold expires, Concur automatically cancels your trip.



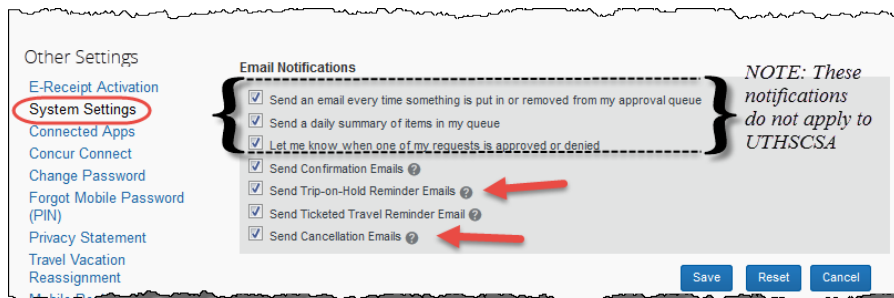
When you place a trip on hold in Concur, and you're ready to complete the purchase, you will find your unfinished trip on the Travel page on the **Upcoming Trips** tab (see illustration below).



By clicking on the *Trip Name/Description*, Concur will retrieve your reservation and display your trip itinerary. Referring again to the illustration for the previous FAQ, when you retrieve a trip on hold, Concur puts you at step 5 in the booking process (Travel Details page).

### Q) Does Concur notify me about trips on hold and cancellations of holds?

Yes. The default setting in your profile includes sending you notifications about both. Immediately after you place a trip on hold, Concur sends you email. Concur also reminds you hours later that a trip is still on hold. If you don't complete the booking, Concur cancels the hold on your reservation and sends email to notify you of the cancellation. Look for these **Email Notifications** under *System Settings* in your profile (see the arrows below).





## UTHSCSA - Frequently Asked Questions

### **Q) If I use Concur to book travel, does the travel agency have to do anything to complete the booking?**

When you get to the *Trip Confirmation* page in Concur and you click the **Purchase Ticket** button, the purchase occurs in real time *through* the Corporate Travel Planners, but the booking is completed and ticketed without any intervention from the travel agency. In essence, Concur acts as your travel agent; however, there is one instance when the travel agency might need to get involved. A question appears on the *Trip Booking Information* page asking if you want to apply an unused ticket. If you select the response *Yes, unused ticket applies*, Concur will place what's known as a "hard stop" on the booking. This is the only situation when a travel agency will need to complete the booking. Before finalizing the booking, a travel agent may need to contact the person who booked the travel to discuss whether it makes sense to apply the unused ticket.

### **Q) What if I enter comments for the travel agent on the Trip Booking Information page in Concur? Will this place a "hard stop" on the booking?**

No, comments won't create a hard stop, so the booking is completed in real time; however, comments to the travel agent do generate actionable tasks for the agents at Corporate Travel Planners. Their agents check for these actionable tasks on an hourly basis.

### **Q) How is ticket fulfillment handled when I use Concur to book airfare?**

When you use Concur Travel to book your fares, electronic tickets (e-tickets) will always be issued.

### **Q) What is the difference between booking a flight with Concur versus purchasing an internet fare directly from a vendor's website?**

Concur provides you access to both agency and internet fares, and the pricing of fares in Concur also reflects the contracted rates between the airlines and the University of Texas System. So, you're not likely to find lower prices than Concur has to offer. The primary differences between the two fare sources boils down to where the ticket is fulfilled and who provides the customer support. With Concur, you have access to the full customer support of the university's contract travel agency when making changes because your ticket is purchased through Corporate Travel Planners. Also, the cost of the ticket is direct-billed to the university.

If you purchase an Internet fare through, let's say an airline's website, you're buying the ticket directly from the supplier or the airline's fulfillment agency. These fares may have special rules that apply and you must contact the airline directly to request a change. Also, you must pay up front for the ticket using your credit card and the university will not reimburse you until you return from your trip. If your trip is weeks or even months away, that's a long time to wait for reimbursement.

### **Q) Some airline websites offer the ability to make hotel and car reservations. Should I use those options?**

No. If you purchase airfare from an alternative source (other than using Concur or the contract travel agencies), you should still use Concur to reserve your hotel and/or your rental car. There may be situations where you purchase your airfare through Concur, but Concur may not be

your best option for reserving lodging. For example, suppose you are attending a conference and the conference organizer has reserved a block of rooms at a nearby hotel to secure reduced pricing for the conference attendees. You may be instructed by the conference organizer to use the hotel's website to make your lodging accommodations. Even in these situations, however, it may still be worth your time to compare the conference organizer's rate with Concur's rates for the hotel. Corporate Travel Planners receives favorable pricing from many hotel chains.

### Q) What do the various icons in Concur represent for air, hotel, and car options?

There are many icons that you'll see while researching fares in Concur. Many of these appear in the fare legend. However, if you don't see the icon in the fare legend, try hovering your mouse over the icon because many of the icons in Concur display a brief description of the icon.

While viewing flight options, click this link to display the fare legend shown below.

Show fare display legend

Sorted By: Policy - Most Compliant

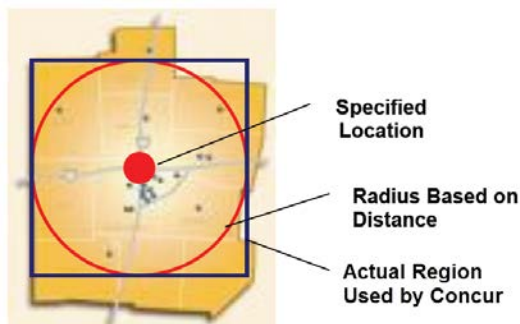
Price	Carrier	Depart	Arrive	Stops	Duration
\$165.20	American Airlines	SAT 08:50 am	DEW 10:00 am	0	1h 10m

fare legend

- R Ticket is refundable
- Flight/Train arrives on a different day
- Short or long connection time
- Turboprop plane
- Least Cost Logical Fare
- Gogo Wi-Fi 50-99% coverage
- Gogo Wi-Fi 100% coverage

### Q) Why does Concur display hotels that are outside my specified search radius?

When you search for a hotel within a specific search radius (in miles), Concur displays all UT preferred hotels within a search distance that is a selected number of miles from your reference point. Because Concur uses a square rather than a circle as the search boundary, the search results can include hotels that are farther away than the distance you entered. For example, if you select a 5 mile radius as your search distance, Concur Travel will build a square that is 10 by 10, with your specified location in the center as illustrated in the following graphic.



### Q) How do I pay for my travel reservations?

By default, Concur charges all airfare and rail fares to a UPT (University Paid Travel) card. Rental cars reserved in Concur are also direct billed to the university. The one travel cost in



## UTHSCSA - Frequently Asked Questions

Concur that cannot be directly charged to the university is lodging. A personal credit or debit card must exist on your profile for confirming lodging accommodations. Your personal card is only used for securing lodging reservations.

### **Q) If I add one or more personal credit cards in Concur, how and when will Concur use the card(s)?**

You can associate more than one credit (and/or debit) card with your profile. Within your profile, you have the option of specifying which of your cards to use as the default card for hotel reservations (see below).

Edit Credit Card

Edit your credit card information as necessary and click **Save Changes** when finished. **All fields are required.**

Display Name (e.g., My Corporate Card) Your name as it appears on this card  
Personal AMEX John E Doe

Card Type Credit Card Number Expiration Date  
American Express xxx-xxxx-xxxx-2008 12 2019

Use this card as the default card for:  
 Hotel Reservations

Receive e-receipts for this card:

If you have multiple personal credit (and/or debit) cards associated with your profile and you don't specify a default card for hotel reservations, Concur will display the *Trip Payment Information* page as an additional step when reserving a hotel. On this page, you (or your travel assistant) will need to select which card to use to confirm your lodging accommodations.

### **Q) Can my travel assistant see my personal credit card number(s)?**

Refer to the illustration in the previous FAQ. Once you add a credit card and save it to your profile, Concur displays only the last four digits of your card number, the card issuer (VISA, AMEX, etc.), and the expiration date of the card.

### **Q) How do I schedule a multi-leg flight?**

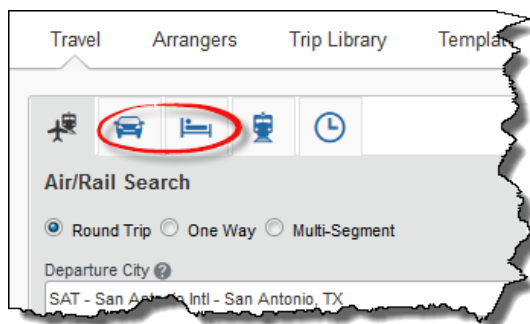
On the **Air/Rail** tab, click **Multi-segment**. This will add two additional arrival/departure boxes to the Air/Rail tab. Specify your departure and arrival information for each segment and then click **Search**.



## UTHSCSA - Frequently Asked Questions

### Q) Can Concur be used to make only hotel and/or rental car reservations?

Yes. If you want to reserve a rental car or hotel without making air travel reservations, click the **Car** or **Hotel** tabs on the trip wizard.



When just a hotel and/or car reservation is made using Concur, the university does incur the \$4.75 transaction fee, but there's a big advantage to using Concur for rental cars...the ease of researching our contract car rental agencies at the same time. The cost of the rental car can be direct-billed to the university, but a credit card in the traveler's Concur profile must be used to confirm a hotel reservation.

You should be aware that there are some situations where you may not be able to use Concur to make your hotel reservation. For example, it is common for some conventions to obtain blocks of rooms at pre-negotiated prices. To obtain the pricing, the convention organizers may require you to use their website (or the hotel chain's website) to receive the pre-negotiated room rates. In such situations, it's likely that neither Concur nor the university's contract travel agencies will have access to the convention's room rates. Even in these situations, however, it may still be worth your time to compare the conference organizer's rate with Concur's rates for the hotel. Corporate Travel Planners receives favorable pricing from many hotel chains.

### Q) How do I reserve a car or hotel at the same time as airfare?

At the bottom of the **Air/Rail** tab, click the checkbox for **Pick-up/Drop-off car at airport** and/or **Find a Hotel**. Then, click the **Search** button. After you reserve your airfare, you will see the car and hotel search results one after the other. If you overlook clicking the checkboxes on the **Air/Rail** tab, you'll still have an opportunity to add a rental car and/or hotel from your airfare itinerary that appears after reserving your flight.

If you add a car and/or hotel on the Air/Rail tab, Concur assumes that you need the car and/or hotel for the entire trip, so you aren't prompted for dates for either the car or the hotel; however, when Concur displays the itinerary, you can click the *Change* link for the car or hotel on the itinerary and a box will appear allowing you to adjust the start and end dates.

### Q) What if I don't need a car or hotel for the entire trip?

If that's the case, or if you are staying at more than one hotel during your trip, you can skip adding a hotel to the Air/Rail tab. Likewise, if you do not need a rental car for the entire length of your trip, or you need to pick up the car at an off-airport location, you can skip adding a car





## UTHSCSA - Frequently Asked Questions

on the Air/Rail tab. Reserve your airfare first. Then, when the itinerary displays, click the Hotel or Car icon. Using this method, Concur prompts you to supply the start and end dates for your reservation.

**Q) Can Concur be used to research travel fares and book trips for international travel?**

No. Although Concur will let you enter a foreign destination, the search for fares won't return any results. For international travel, you will need to contact an agent at either Corporate Travel Planners or Anthony Travel.

**Q) Can Concur be used to make first class or business select reservations?**

No.

**Q) Can Concur be used to reserve a rental car for personal use?**

No. You can contact either of the university's travel agencies to reserve a rental car for personal use. You will not be charged a transaction fee; however, the rental cannot be direct billed to the university. The agent will ask you for a personal credit card to make the reservation.

### Reserving and Booking Travel for Non-Employees

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**Q) Can Concur be used to book travel for another person who is not employed by the university, but who will accompany a UTHSCSA employee on his/her official university business travel?**

No; however, once you book the travel for the employee, you can contact Corporate Travel Planners or Anthony Travel to assist with making arrangements for the non-employee traveler. The travel agency will charge a \$25 transaction fee. This fee cannot be charged to the university. The agent will ask you to provide a credit or debit card to complete the purchase. The advantage of using the travel agency is that the non-employee's travel costs will be based on University of Texas System negotiated rates and discounts, as well as the favorable fares and discounts enjoyed by the contract travel agencies. Also, the travel agent may be able to more easily book adjacent seats.

**Q) Can an employee use Concur for personal travel?**

No. Concur should be used for travel related to official university business only. If an employee traveling on official university business is accompanied on a trip by another employee whose travel is personal, only the business portion of these employees' travel should be booked in Concur. If the employee traveling on business intends to include some personal vacation time prior to or subsequent to the business travel, the trip can still be booked in Concur. When creating the travel voucher, the department would apportion the employee's travel costs between business and personal.



## UTHSCSA - Frequently Asked Questions

### **Q) Can students use Concur?**

No. Concur is for employee use only.

### **Q) Can Concur be used for making travel accommodations for consultants or prospective employees?**

No. Business Travel Account (BTA) travel will continue to be handled as a full-service booking through a UT approved travel agency.

## **Cancel/Change Booking**

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### **Q) How do I change an airline reservation in Concur after it has been booked?**

You can make few a changes to your air itinerary after booking, but before your ticket is issued. You can make changes to your seat assignment and you can change the time or date of the flight. Your change options will be with the same airline and routing. Click the trip name in the **Upcoming Trips** tab of Concur. To make other changes your air itinerary, or to make any changes once your ticket has been issued, contact Corporate Travel Planners' full service desk. To change an Internet ticket you purchased outside of Concur, you must contact the airline's customer service directly. The university's travel agencies will not be able to assist you.

### **Q) Can I add a car or hotel to an airline reservation after it is booked?**

You can make these changes before your ticket is issued. To add to, or modify your trip, click the name of the trip on the **Upcoming Trips** tab of Concur. Then, click **Change Trip**.

**Note:** If you contact Corporate Travel Planners to cancel a reservation after it has been booked in Concur, the itinerary is not automatically removed from the **Upcoming Trips** tab in Concur. To remove the itinerary, select the trip name and click **Withdraw Request**.

## **Travel Itinerary, Confirmations, and Alerts/Notifications**

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### **Q) Where do I view my itinerary?**

Concur Travel will email your itinerary to you immediately after you complete the booking. Subsequently, you will receive another email from Corporate Travel Planners (CTP) with several PDF attachments, one of these being your itinerary.

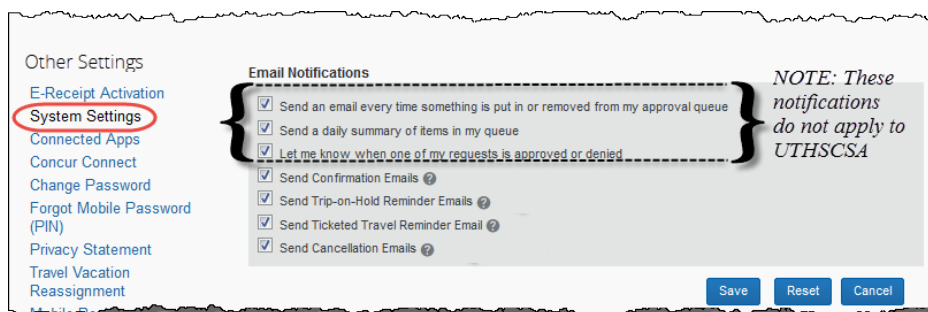
If you're looking for a mobile solution for viewing your itinerary, **Concur Mobile** is one option. Concur Mobile, a free app, can be linked with your Concur account so you'll be able to see the itineraries visible in Concur's **Upcoming Trips** tab. The university does not provide support for Concur Mobile. See also this FAQ: *What is Triplt? What is TripCase?*


### Q) How can I view the itinerary for flights I have already booked?

In Concur, review the **Upcoming Trips** tab. For more detailed information, click the appropriate trip name in the **Trip Name/Description** column and then click **View Itinerary**.

### Q) What kinds of alerts/notifications does Concur send by email?

Email notifications are configured in your Concur profile. At the top of the Concur page, click **Profile**. Then, from the drop-down menu that appears, click **System Settings**. You'll see the Email Notifications box shown below.



The first three email notifications relate to approvals in Concur. These do not apply since UTHSCSA is not using Concur's approval process, but there is no harm in leaving these notifications enabled. The last four notifications do apply. Click the  icon to see a brief tip about the notification. It is recommended that you leave all notifications enabled when you first begin using Concur. You can always selectively disable a notification once you have more experience with the application.

### Q) What do I do if I don't receive Concur's email confirmations or alerts?

It's possible that you are receiving the emails, but they are going to junk mail. This shouldn't happen because steps have been taken to ensure that our university's mail servers won't treat emails from Concur or the travel agencies as junk email. Another possibility is that you have one or more Email Notifications disabled in your Concur profile.

### Q) What type of confirmation do I need at the airport?

You should bring a printed copy of your email itinerary with ticket number information or the paper ticket (whichever is acceptable by the airline) and a TSA-acceptable identification such as a driver's license, Passport, VISA, etc. A complete list of TSA-acceptable IDs can be found on the Transportation Security Administration's website at:

<http://www.tsa.gov/traveler-information/acceptable-ids>



## UTHSCSA - Frequently Asked Questions

### Q) What is Triplt? What is TripCase?

Triplt and TripCase are competing third-party applications with both web and mobile platforms. You can use these applications to organize your travel plans into one consolidated itinerary. ***Your use of these applications is optional; the university does not recommend or support either of these applications.***

Concur developed Triplt, and so Concur has built-in integration for Triplt. TripCase was developed by Sabre Holdings. When Corporate Travel Planners emails you an itinerary, their email will include a link to view your itinerary in TripCase. Both TripCase and Triplt offer free versions as well as subscription versions.

## Travel Requisition and Approvals

[\[Return to FAQ Topics\]](#)

### Q) Does Concur eliminate the travel requisition?

No. In general, Concur eliminates the need to contact a travel agent to provide airfare quotes and to book travel. A travel requisition is still needed to authorize official university travel. If you book the trip using Concur, there is no need to send the travel requisition to the contract travel agency.

### Q) I see a number of places in Concur that indicate my trips need approval. Is there an approval process in Concur?

There is, but UTHSCSA is not using this feature. Within Concur, you can ignore items such as the *Trips Awaiting Approval* tab and the approval-related email notifications in the **System Settings** of Concur. Also, disregard the **Travel Vacation Reassignment** in your Concur profile.

### Q) How does Concur relate to the PeopleSoft travel requisition?

Approval (or denial) of a trip is still accomplished by completing a travel requisition in PeopleSoft Financials and submitting it for approval. There is no approval required in Concur. On the *Trip Booking Information* page in Concur, you will be required to enter the traveler's *Dept Number (i.e. DeptID)*, the PeopleSoft *Requisition Number*, and the *Proj/GRT Number* (project ID) used on the travel requisition. This is needed to ensure that the cost of the travel can be charged to the correct department and project ID. Is it important to note that a trip can be placed on hold in Concur without having to supply these details on the *Trip Booking Information* page.

### Q) What if I need to quickly complete a booking to take advantage of a time-sensitive, low cost airfare, yet I don't know the PeopleSoft travel requisition number yet?

Assuming you know the travel will be approved, you can make the reservations in Concur and put the trip on hold. A trip can be placed on hold without supplying the required travel



## UTHSCSA - Frequently Asked Questions

requisition number, project ID, and department ID. Print or email your itinerary directly from within Concur so that you (or your travel assistant) will have the necessary cost information to create the PeopleSoft travel requisition and submit it for approval. There is no requirement to have your travel requisition approved before you (or your travel assistant) can return to Concur and complete the booking. Although you do not have to supply Concur with the requisition number, project ID and department ID to place a trip on hold, these fields are required entries to advance from the *Trip Booking Information* page in Concur to the *Trip Confirmation* page where you complete the booking (i.e. purchase the ticket).

Just keep in mind that anytime you place a reservation on hold, make certain that you can complete the booking in Concur before the time limit expires on the hold. A hold typically lasts for 24 hours, but the actual time limit for holding a reservation is dictated by the fare you choose.

**Q) Currently, a travel agent won't complete a booking without an approved PeopleSoft travel requisition. Does Concur likewise enforce having an approved travel requisition to complete a booking?**

Concur will let you enter a requisition number that is still pending approval. Although Concur won't enforce having an approved travel requisition to complete a booking, your department may require it.

**Q) Since I can book travel in Concur without involving a travel agent, is there any need to check the "Send REQ to Travel Agency" checkbox on the PeopleSoft travel requisition?**

If the travel is booked in Concur, there is no need to send the travel requisition to the travel agency, and you therefore should not check the *Send REQ to Travel Agency* checkbox on the travel requisition. The only reasons to send the PeopleSoft travel requisition to the travel agency will be if the travel entails some type of action that Concur won't let you complete yourself (for example, booking international travel), or if you want the travel agency to make the travel reservations for you (a full service booking).

## Costs/Benefits of Concur

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**Q) Is there a charge for using Concur?**

The only cost departments will incur is the cost of travel fares purchased in Concur, and of course, any applicable fees resulting from airfare changes/cancellations. The university incurs a \$4.75 transaction fee whenever you either (1) place a reservation on hold, or (2) you actually purchase a ticket in Concur. These transaction fees are not passed along to the department; however, you should avoid generating transaction fees unnecessarily. Do not place a reservation on hold unless you are reasonably certain that you will actually purchase a fare and that you can finalize the booking before the hold expires. The transaction fee is not avoided if the time limit expires for a reservation placed on hold. In addition, if you place a



## UTHSCSA - Frequently Asked Questions

reservation on hold and you subsequently cancel the reservation, the university is still assessed the \$4.75 transaction fee. On the other hand, if you place a reservation on hold and you complete the booking before the hold expires, the university is charged the \$4.75 transaction fee only once, at the time the reservation was placed on hold.

### **Q) Why use Concur? Can I still contact Corporate Travel or Anthony Travel?**

Ease of use, convenience, and low cost fares are the biggest reasons to use Concur. Using Concur to book trips also generates a savings for the university. A full service domestic booking costs the university \$16.50, whereas with Concur, the transaction fee is only \$4.75. That's a savings of \$11.75. You can still contact one of the contract travel agencies to make travel arrangements, but you won't believe how quick and easy Concur is to use. Making travel arrangements can often involve trading multiple emails and phone calls with a travel agent. With Concur, you can save time and avoid the frustration. If you are a travel arranger, you can build an itinerary and email it to the traveler directly from Concur, and this can be done without generating any transaction fees. Although you don't have to use Concur to make travel arrangements, any employee who travels on university business outside his/her headquarters city will need to create a Concur profile. For international travel, you must contact the travel agency. Concur won't let you book international travel.

## Getting Help with Concur

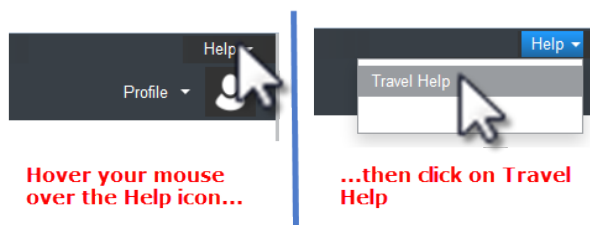
[\[Return to FAQ Topics\]](#)

### **Q) How do I get help with using Concur Travel?**

There are a number of options available to you. You will find some general help guides about Concur at: <http://ut-ctp.com/uthscsa/>. At this link, you will also find these FAQs which may be updated from time to time. So, if you've printed these FAQs, always check the revision date at the bottom of your printed copy to make sure you are looking at the most recent version.


Here are some other sources of help:

- If you have difficulty accessing Concur, registering, or trying to use Concur's features, you can contact the Online Help Desk (toll free 877.727.5188), or you can send email to [uthscsa@ctp-travel.com](mailto:uthscsa@ctp-travel.com).
- For help with some of Concur's features, you can try consulting Concur's built-in help. See the illustration below. The Help icon appears in the upper right corner of your Concur session. In Concur's online Help, you can find specific instructions for completing many tasks.





## UTHSCSA - Frequently Asked Questions

Concur also provides many help messages and visual cues as you work. Next to many of the fields in Concur, you'll see a Quick Help icon that looks like this: . Click the icon to see the Quick Help text.

- For questions regarding ticketed travel reservations, please call or email Corporate Travel Planners. You will find their contact information at <http://ut-ctp.com/ctp-contact/>.
- Visit the [Travel Services Office](#) page on the portal or send email to: [concuradmin@uthscsa.edu](mailto:concuradmin@uthscsa.edu).
- For questions relating to university travel policy, visit the Handbook of Operating Procedures, [Section 6.2](#).

**Q) Are the agents who staff Corporate Travel Planners' Online Desk knowledgeable about travel, or just how to use Concur?**

The agents at the Online Desk have also worked as full service agents, so they can answer questions for you about booking travel, as well as how to use Concur; however, *after* the travel has been booked in Concur, you should contact the Full Service Desk at 866-366-1142 (toll free) or 210-366-1142 (local).