



Quick Reference Guide for the Travel Arranger/Assistant

(Terms can be used interchangeably)

Concur is the online travel booking tool selected by your company. Travel Leaders / Destinations Unlimited has customized Concur Travel based on your company travel policy. Log into Concur at: <http://www.concursolutions.com>

You must have a user profile established in Concur to make reservations. To self-register contact your company's travel program manager or the travel agency for assistance.

TRAVEL ARRANGER/ASSISTANTS PRIMARY ASSISTANTS

- Travel Arrangers/Assistants are able to make reservations on behalf of someone with a Concur profile in place.
- A traveler can have more than one arranger/assistant.
- An arranger/assistant can book for more than one traveler.
- A traveler can designate **ONE** arranger/assistant as a **primary assistant**.
- The primary assistant will always receive an email copy of the itinerary for the traveler, regardless of who made the reservation (primary assistant, other travel arranger/assistant or traveler).
- The primary assistant is able to modify the traveler's profile as needed.
- The primary assistant **MUST** have an office/work telephone in their profile.

Important: Travel Arrangers/Assistants can book for other profiled travelers. Travel Arrangers/Assistants that have been given guest permission access can book for others and for non-employee guest travelers. Guest permission status must be assigned by your company's internal Concur Travel point person.

CLONE AND/OR SHARE TRIP FEATURE

Clone Trip (definition): To create a new trip for Traveler B that duplicates the exact trip that is already booked for Traveler A.

- A Traveler Arranger may choose to 'Clone a Trip' for a second traveler by selecting '**Clone Trip**' from Traveler A's reservation.
- Once selected, the arranger simply selects the name of the second traveler (Traveler B) and the trip is created based on the choices selected.

Share Trip (definition): A traveler may send an invitation to another traveler within the company to join them on their trip.

- Traveler A selects '**Share Trip**' > Type in the name of whom you wish to invite (i.e., Traveler B)
- Click on '**Search**' if a name list is not present.
- Traveler B receives an invitation when he logs onto Concur. Recipient may:
- Accept (Concur automatically completes a new reservation for Traveler B to match Traveler A's trip)

TRIP OVERVIEW

I want to...

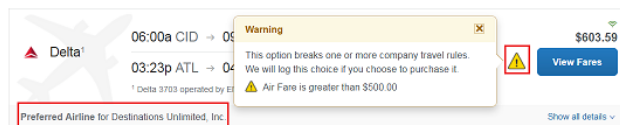
[Print Itinerary](#)
[E-mail Itinerary](#)
[Open in Outlook](#)
[View Trip History](#)
[Create Template](#)
[Clone Trip](#)
[Share Trip](#)
[Cancel Entire Trip](#)

Both features provide the same function, which allows creation of additional travelers on the same trip. Alterations to the trip are available during the clone trip processes.

If you are using the '**Clone Trip**' feature, you must already be assigned as an 'Assistant/Arranger' in the **new** traveler's profile.

COMPANY PREFERENCES

Concur highlights your company's travel preferences and policies. This may be displayed in the form of custom text, policy alerts or supplier biasing/contracting.



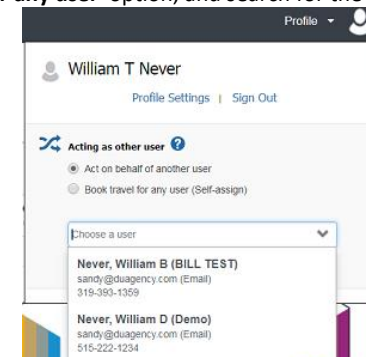
You may be required to provide a reason why you are selecting an option that is outside of company policy. In some cases, a selection may prompt a notification to your direct manager or a company travel program manager.

MAKING RESERVATIONS FOR OTHER EMPLOYEES

LOG INTO YOUR CONCUR ACCOUNT

(See user guide for log in and booking instructions)

- Click the Profile option at the top right-hand corner.
- If the traveler has selected you as a travel arranger in their profile you will see their name in your pull down list when the '**Act on behalf of another user**' radio button is active.
- If you have self-assigning permissions, you can choose the '**Book travel for any user**' option, and search for the desired traveler.



- Once you select the desired traveler, click '**Start Session**' and the profile area will show the traveler you are now acting as.

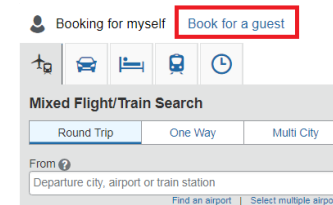
Acting as
Never, William B

- Their travel profile preferences will automatically pre-populate as you go through the booking process.
- Follow Concur process for booking flights, hotels, and rental cars.

BOOKING A GUEST TRAVELER

All Travel Arranger/Assistants must have guest booking permissions assigned to book for a non-employee guest traveler. Contact your internal Concur point-person for this access. Once you have this permission, follow the steps below.

- Log into your profile
- Click the '**Book for a guest**' link found above the search fields along the left side of the screen.



- Enter data in the search criteria.
- Select desired flights, car, and/or hotels.
- You will be prompted for guest info during the purchase process.

MY TEMPLATES

- A **'Trip Template'** is a record of a trip that you can use at a later date to make travel reservations for the same trip and travel cities, speeding up the reservation process. This is especially handy if you book for several employees traveling to the same location or if you have employees that take the same trip repeatedly.
- You can use any prior trip that you've arranged for yourself or others to create a template.
- To create a **'Personal Travel Template'**, click on the **'Add New Template'** link. New templates can be created from an empty template or by using an existing trip.
- To use a trip template, select **'Templates'** from the Concur navigation bar.
- Select a trip from the list of Personal Travel Templates that you've set up.

ITINERARY AND E-RECEIPT

Travelers will receive an email E-Receipt. **Note:** Printed itineraries cannot be used as a receipt, only E-Receipt serves as the true receipt. Please allow up to an hour to receive your email receipt.

- Click on the **'Book'** link next to the template you wish to use. Enter new dates. Concur will use your pre-defined details to book your trip.
- Click on the **'Edit'** link next to the template if you wish to change some of the pre-defined information (e.g., Time of travel).



Travel Templates

You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.

You may view itineraries and book travel for the following people using their templates:

Never, William J. (FWT User)

Search

Personal Travel Templates -- William Never				+ Add New Template	
	Template Name		Created by	Description	
		Trip from Chicago to Seattle	Never, William		
		Trip from Minneapolis/St. Paul to Chicago	Never, William		
		Trip from Tampa to Knoxville	Never, William		

CHANGE OR CANCEL A BOOKING

Changes to flights booked on Concur can only be completed prior to ticket issue. For post-ticket flight changes or changes to reservations that you have booked over the phone, please contact Travel Leaders / Destinations Unlimited at 319-366-8904.

- Select the traveler's name from the Profile menu on the upper right of the screen.
- If you have an un-ticketed trip and wish to make a change, click a trip the **'Upcoming Trips'** section.
- Choose **'Change Trip'** or **'Cancel Trip'** from the Trip Actions menu. The Concur travel wizard will open the trip so you can make changes.

TRIP OVERVIEW

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[Clone Trip](#)

[Share Trip](#)

[Cancel Entire Trip](#)

- Trip cancellations can be completed online.

CONFIRMING YOUR BOOKING

- The **'Travel Details'** page provides an opportunity to review your selections prior to purchase.
- To change existing reservations, Call **Travel Leaders / Destinations Unlimited** at **319-866-3904**.
- Select **'Change Seat'** to change any pre-assigned seat numbers (if available).
- Select the **'Add Car'** or **'Add Hotel'** links to add a car rental or hotel booking.

Add to your Itinerary



[Air](#)



[Car](#)



[Hotel](#)

- Review **'Totals and Restrictions'** area for price breakdown and rules/restrictions that may apply.
- Select **'Purchase'**

ITINERARY AND E-RECEIPT

Travelers will receive an email from Concur upon completion of the booking purchase. Shortly thereafter, you will receive an e-mail from Travel Leaders / Destinations Unlimited as confirmation your reservation has been successfully quality controlled and invoiced/ticketed. **Note:** Please allow up to an hour to receive your email receipt.

NEED HELP?

- Select **'HELP'** from the Concur navigation bar to display quick links to online help information.
- Or you can contact the team at:



DESTINATIONS UNLIMITED • WINEBRENNER TRAVEL

Monday - Friday 8:00A-5:00P CST

**To book a reservation direct with an agent call Tricia or Micki at:
319-351-4510**

**For Concur assistance or to change Concur-booked reservations contact:
319-366-8904 or email
online@duagency.com**

Monday - Friday 8:00A-5:00P CST