

Travel Setup Guide

for Concur Standard

Last Updated: December 10, 2021

Applies to these SAP Concur solutions:

- Expense
 - Professional/Premium edition
 - Integrated with Professional/Premium Travel
 - Stand-alone
 - Standard edition
 - Integrated with Standard Travel
 - Stand-alone
 - Concurforce
- Travel
 - Professional/Premium edition
 - Integrated with Professional/Premium Expense
 - Integrated with Professional/Premium Request
 - Stand-alone
 - Standard edition
 - Integrated with Standard Expense
 - Stand-alone
- Invoice Management
 - Professional/Premium edition
 - Integrated with Professional/Premium Expense
 - Stand-alone
 - Standard edition
 - Integrated with Standard Expense
 - Stand-alone
- Request (formerly Travel Request)
 - Professional/Premium edition
 - Integrated with Professional/Premium Expense
 - Integrated with Professional/Premium Travel
 - Stand-alone

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Revision History

Date	Notes / Comments / Changes	
January 21, 2022	Updated the copyright year; no other changes; cover date not updated	
December 10, 2021	Updated instructions for Product Settings page	
August 30, 2021	Removed references to CIBT (retired this date).	
March 19, 2021	Updated <i>About this Guide</i> and <i>Setup Wizard</i> sections	
July 24, 2020	Updated the procedure on pages 55-56 to reflect updates to the Users page UI.	
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated	
February 17, 2020	Updated China terminology to Hong Kong, China	
January 15, 2020	Updated the copyright; no other changes; cover date not updated	
May 23, 2019	Added information about Dual Fare Display (Sabre Only)	
May 13, 2019	Minor edits; removed information on password hints	
February 12, 2019	Updated the copyright; no other changes; cover date not updated	
May 29, 2018	Updated to include the changes for May 2018 including:	
	Section	Description/Action
	Site Customization	Removed setting for the privacy agreement
March 30, 2018	Added notes about best practice of not allowing personal or sensitive data in custom fields	
January 23, 2018	Added: NOTE: The LoginID must be unique across all Concur products. If a LoginID is currently in use in any Concur product, it cannot be assigned again unless the original occurrence is changed. For example, assume that a LoginID was assigned in error. That LoginID can only be used again if an admin (either manually or via import) renames the original occurrence, allowing the LoginID to be used again.	
January 28, 2018	Updated to include the changes for January 2018 including:	
	Section	Description/Action
	Default Travel System Admin Settings	In the TSA Settings section, the Date of Birth Unknown check box automatically appears
January 28, 2018	<p>Changes <i>not</i> related to the release</p> <p>Removed these sections; created new Travel Service Guides:</p> <ul style="list-style-type: none"> • Travel Admin – Travel Policy tab • Travel Admin – Policy Violation Codes tab <p>Refer to the <i>Approvals, Rules, and Classes/Policies Travel Service Guide</i>.</p>	
Older revision history has been removed.		

Travel Setup

Section 1: About this Guide

The information in this guide applies to *Travel* in Concur Standard. There is a separate guide for *Expense* in Concur Standard.

Travel Service Guides

There are *travel service guides* available for many of the features described in this setup guide. Where this setup guide describes how to configure each option in the Travel Setup Wizard – for example, how to enable a direct connect – the travel service guides are more comprehensive and provide important information like:

- Steps required **before** using the Travel Setup Wizard, like obtaining the required agreement with a vendor
- Additional implementation steps, for example, in Travel System Admin
- What the user sees; the user experience
- How the feature works
- The benefits of using the feature
- FAQs

Some of the features in this guide **require** that you review the travel service guide **before** implementing the feature in Travel (direct connects); most do not (travel rules, organization units, custom text, etc.).

In those cases where it is important to review the information in the travel service guide for successful implementation, this type of message appears.

For this feature/option, **additional steps are required**. In some cases, the required steps must be completed **before** using the Travel setup wizard (like obtaining a vendor agreement).

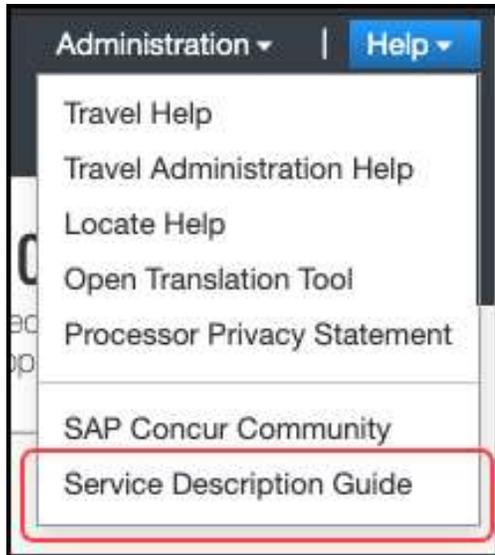
 Refer to the <name> *Travel Service Guide*.

To locate for guide, see *Find the Travel Service Guides & Fact Sheets* in the appendix of this guide.

Service Description Guide

SAP Concur has added the **Service Description Guide** link to the **Help** menu on the SAP Concur home page. This change is provided in accordance with SAP Concur Legal requirements.

To access the **Service Description Guide** link, click **Help** (upper-right corner) on the SAP Concur home page and then click the **Service Description Guide** link.



The **Service Description Guide – SAP Concur** page appears.



Section 2: Introduction

Use the Travel Setup Wizard to manage company options, user data, and travel booking settings. You can access the setup wizard by clicking **Administration > Setup > Travel** at the top of any page. Once in the setup wizard, you can access different pages by using the left-side menu. None of these steps/pages are dependent on the other.

Section 3: Log in to Travel - Access the Setup Wizard

▶ *To log in to Travel and access the Setup Wizard:*

1. Go to www.concursolutions.com.

2. Type your Login ID in the **User Name** field.
3. Type your password in the **Password** field.

NOTE: Remember the password is case sensitive.

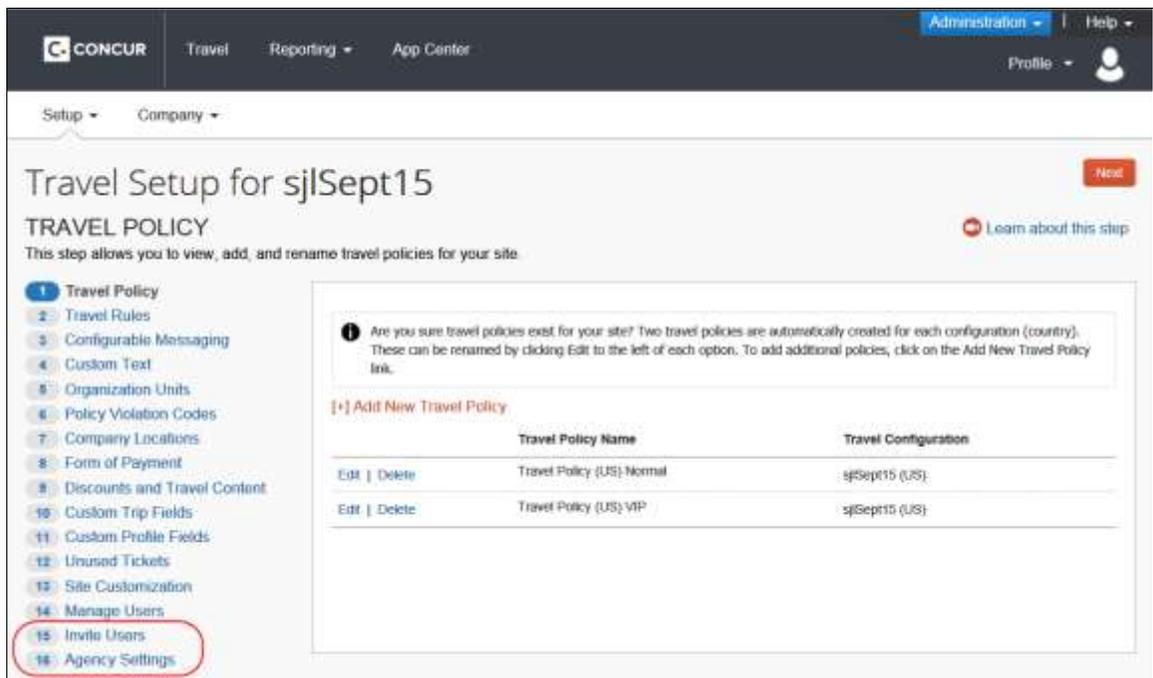
4. Click **Login**.
5. Click **Administration > Setup** at the top of any Travel page.

Section 4: Setup Wizard

The setup wizard allows you to manage all administrative settings and preferences. The **Setup Wizard** page and the setup process differ slightly if you are implementing Travel by itself versus implementing Travel with Expense.

Implement Travel by Itself (Without Expense)

The **Setup Wizard** page has 16 steps (detailed in the table below).



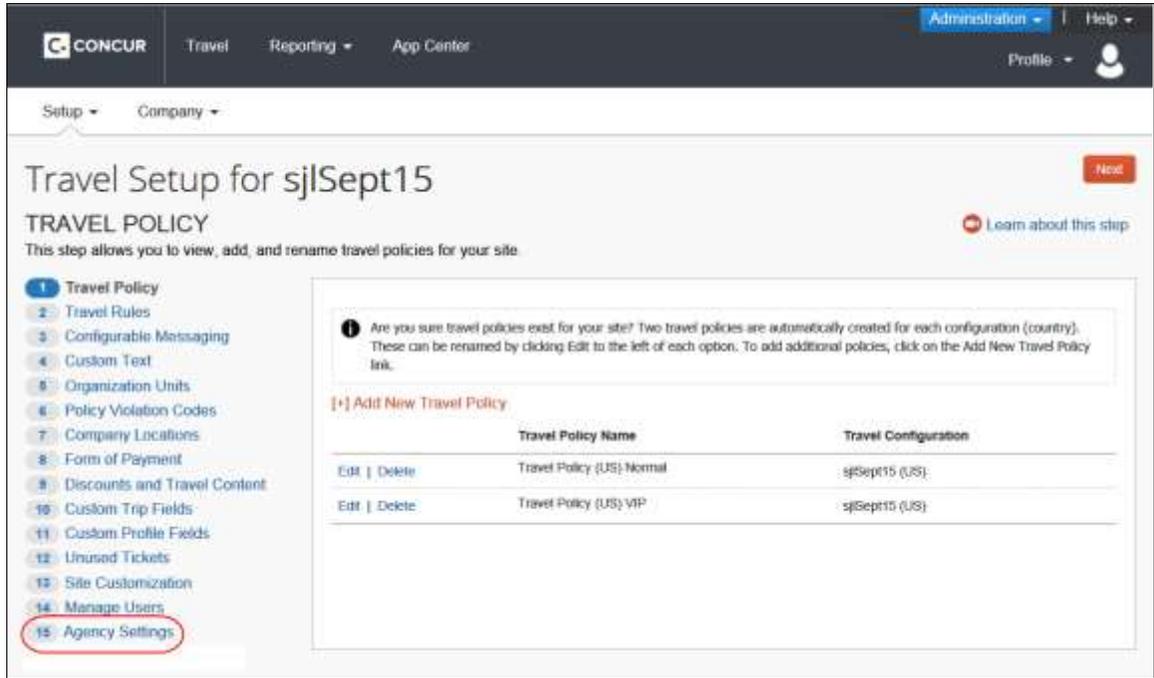
The first 14 steps match exactly the steps available when implementing Travel with Expense; the last 2 steps differ. Each is described on the remaining pages of this guide.

Step	Option	Description/Action
1	Travel Policy	Edit travel policy names

Step	Option	Description/Action
2	Travel Rules	Manage travel rules (pre-defined and custom), benchmark lowest fares, manager notifications, search options, and other travel features
3	Configurable Messaging	Manage trip-specific custom messaging
4	Custom Text	Manage custom text (labels)
5	Organization Units	Manage organization units (groups)
6	Policy Violation Codes	Manage messaging and codes for users when booking out-of-policy trips
7	Company Locations	Define company locations
8	Form of Payment	Manage ghost cards
9	Discounts and Travel Content	Manage vendor discounts, preference levels, hotel imports, direct connect providers, visa/passport services, Travelfusion suppliers, and government rates
10	Custom Trip Fields	Manage questions asked of the user during the booking process
11	Custom Profile Fields	Manage profile fields
12	Unused Tickets	Manage unused tickets for all users
13	Site Customization	Upload the customer's logo, and manage other configuration settings
14	Manage Users	Create, modify, and delete users NOTE: This option appears only if the implementation does not include Expense Standard.
15	Invite Users	Email notification sent out to users at launch NOTE: This option appears only if the implementation does not include Expense Standard.
15 / 16	Agency Settings	Manage trips-on-hold, companions, etc., Transportation Security Administration (TSA) settings, and agency invoice NOTE: If the implementation includes Expense Standard, then this step becomes step 15.

Implement Travel with Expense

The **Setup Wizard** page has 15 steps (detailed in the table above).



Step 1 – Travel Policy

Overview

A *policy* is a collection of travel settings and preferences. Concur provides two travel policies per configuration. You can create an unlimited number of additional policies.

Use the **Travel Policy** step to:

- Edit the names of the provided (default) policies
- Create new policies
- Delete policies

 For complete details, screen captures, and setup steps, refer to the *Approvals, Rules, and Classes/Policies Travel Service Guide*.

Step 2 – Travel Rules

TRAVEL RULES

This step allows you to define your travel policies, determine the benchmark lowest fare and assign trip approvers.

- 1 Travel Policy
- 2 Travel Rules**
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users

Travel Rules | Benchmark Fare | Manager Notification | Search Options | Travel Features

Please select the travel policy you want to update. Be sure to save your changes before moving

Travel Policy (US) Normal

Travel Rules

i To enable a rule, choose Log for Reports^(?), Notify Manager^(?), Passive Approval^(?) or Re...
Please note: Passive Approval and Require Approval will prevent instant purchase fares fr...
have enabled a rule, you can change the values associated with it. Be sure to save your c...
next step.

Travel Itinerary

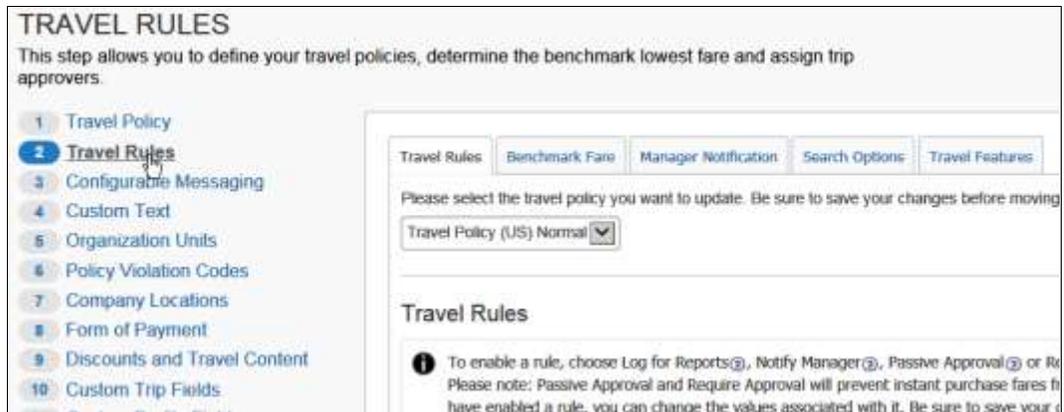
Disabled | All Trips

Tab	Description/Action
Travel Rules	Refer to the <i>Approvals, Rules, and Classes/Policies Travel Service Guide</i> .
Benchmark Fare	Refer to the <i>Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide</i> .
Manager Notification	Refer to the <i>Approvals, Rules, and Classes/Policies Travel Service Guide</i> .
Search Options	See below.
Travel Features	Refer to the <i>Approvals, Rules, and Classes/Policies Travel Service Guide</i> .

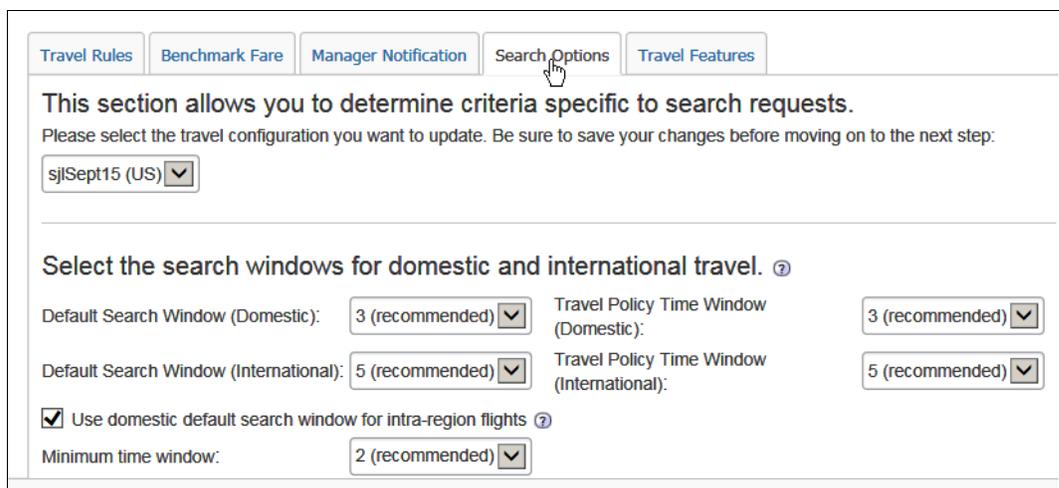
Define Search Options

► **To define search options:**

1. In the left-side menu, click **Travel Rules**.



2. Click the **Search Options** tab.



3. Select the desired policy.
4. Modify the settings as needed. Help text is available to explain nuances.

Setting	Default	Description/Action
Default Search Window (Domestic)	3 Hours	Select the number of hours for the default search window, for both domestic and international travel. The default window will pre-populate when the traveler selects dates and times on the Flight tab. The traveler can change the default window when searching but cannot search a smaller time window than is defined in the Minimum time window field or a longer time than is defined in the Maximum time window field below.
Default Search Window (International)	5 Hours	
Travel Policy Time Window (Domestic)	3 Hours	Select the number of hours for the default window for benchmark lowest fares, for both domestic and international travel.

Setting	Default	Description/Action
Travel Policy Time Window (International)	5 Hours	<p>The default window will pre-populate when the traveler selects dates and times on the Flight tab. The traveler can change the default window when searching but cannot search a smaller time window than is defined in the Minimum time window field or a longer time than is defined in the Maximum time window field below.</p> <p>NOTE: For Worldspan only, the <i>Anytime</i> option will appear only for users if the Maximum Window field is set to 12 hours.</p>
Use domestic search window for intra-region flights	On	<p>Select to enable.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • <i>Domestic</i> is defined as within a country, for example, Chicago to New York. • <i>International</i> is defined as crossing a country border, for example, Paris to Hong Kong, China. <p>Enabling this feature will cause intra-region itineraries to default to the domestic time window, for example, London to Frankfurt will become <i>domestic</i> rather than <i>international</i>.</p>
Minimum time window	2 Hours	<p>Select the minimum time window (in hours) that a user can define for searches.</p>
Maximum time window	9 Hours	<p>Select the maximum time window (in hours) that a user can define for searches.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • For Worldspan only, the <i>Anytime</i> option will appear only for users if the Maximum Window field is set to 12 hours. • For Sabre only, the admin can select an option greater than 9 from the Maximum Window list only if Bargain Finder Max is enabled and if the Max Search Results field is set to 200. (Bargain Finder Max is set in Travel System Admin.)
Default Search Type	Initially default to Search by Price	<p>Click one of these:</p> <ul style="list-style-type: none"> • Initially default to Search by Price • Initially default to Search by Schedule • Always default to Search by Schedule • Only Search by Schedule: When using the Travel Wizard, users will not have a choice to search by price or schedule. Travelers are automatically directed to the Shop by Schedule tab but the Shop by Fares tab is available for use.

Setting	Default	Description/Action
Don't show prices on Schedule	Off	Select (enable) this check box if you do not want prices to appear. NOTE: Choosing Only Search By Schedule as the default search type and enabling Don't show prices on Schedule will force travelers to always go to the Shop by Schedule tab where they see a schedule with no prices . The traveler will be able to select individual combinations of flights and the low-fare search would begin when travelers quote their options.

5. Click **Save**.

Step 3 – Configurable Messaging

 For complete details, screen captures, and setup steps, refer to the *Configurable Message Boards Travel Service Guide*.

Step 4 – Custom Text

 For complete details, screen captures, and setup steps, refer to the *Custom Text Travel Service Guide*.

Step 5 – Organization Units

Overview

Use the **Organization Units** step to create groups. Then, you can apply certain settings and features by organization unit.

NOTE: Please be sure to consult your fulfillment TMC on all additions, changes, and deletions if your company is using organization units to manage company-level profiles. Changes will have a significant impact to their operational process.

WHAT THE ADMIN SEES

If enabled, the admin sees the **Organization Unit** dropdown in the profile in the **Manage User** step. This will be editable for any user with access to the setup wizard.

User Detail for: sjl0402

Travel Policy: Travel Policy (US) Normal | Manager: [] | [Select Manager](#) | [Clear Manager](#)

Login ID: cc@sjl0402.com | Email Address: cc@sjl0402.com | Password: [] | Retype Password: []

Name

Your Name and Airport Security: Please make certain that the first, middle, and last names show on the photo identification that you will be presenting at the airport. Due to increased airport security the gate if the name on your identification does not match the name on your ticket.

Title: [] | Suffix: [] | First Name: C | Last Name: C | Middle Name: []

GDS Profile Name: [] | XML Profile Sync ID: [] | **Organization Unit:** []

Employee ID: cc@sjl0402.com | Account Activation Date: 04/02/2015 | [] | []

HR
Marketing
Sales

WHAT THE USER SEES

If enabled and made visible to users, the user sees the **Org Unit/Division** dropdown in his/her profile in the **Company Information** section. This will be set to either view-only or editable, depending on the configuration setup.

Company Information

Employee ID **[Required]**: cc@sjl0402.com

Manager: [] | **Org. Unit/Division **[Required]****: [] | Employee Position/Title: []

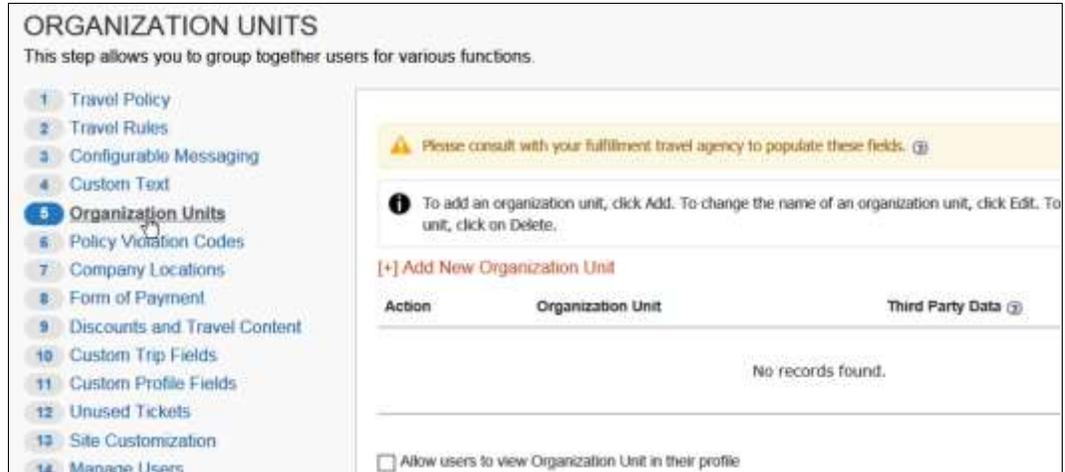
HR
Marketing
Sales

[Save](#)

Add a New Organization Unit

► **To add a new Organization Unit:**

1. In the left-side menu, click **Organization Units**.



2. Click **Add New Organization Unit**.



The **Add New Organization Unit** window appears.

3. Make the appropriate choices as described in the following table.

Field	Description/Action
Organization Unit	Enter a name for the organization unit.

Field	Description/Action
Sabre Profiles Template ID	This field appears only if using Sabre Profiles. Work with your fulfillment TMC to determine the Sabre Profiles Template ID.
Third Party Data	If passing to a third party, determine the value to be passed.

4. Click **OK**.

NOTE: Admins may also assign organization units via the User Upload feature.

Work with Properties

There are three options available via check boxes:

- Allow users to view Organization Unit in their profile
- Allow users to edit Organization Unit in their profile – If selected (enabled), the check box above will automatically be selected, allowing users to view as well as edit in their profile
- Require Organization Unit – If selected (enabled), the two check boxes above will automatically be enabled, allowing users to view and edit in their profile

[+] Add New Organization Unit

Action	Organization Unit
Edit Delete	HR
Edit Delete	Marketing
Edit Delete	Sales

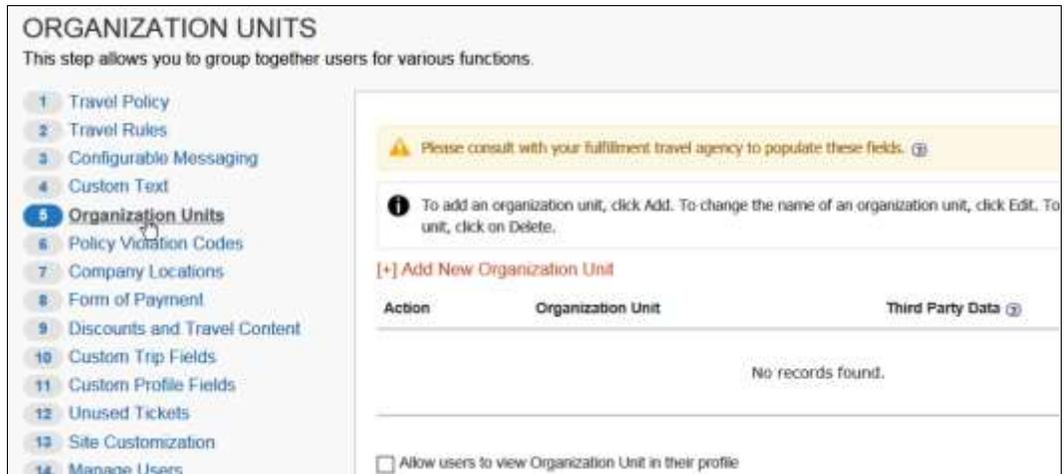
Allow users to view Organization Unit in their profile

Allow users to edit Organization Unit in their profile

Require Organization Unit

► **To use the properties:**

1. In the left-side menu, click **Organization Units**.

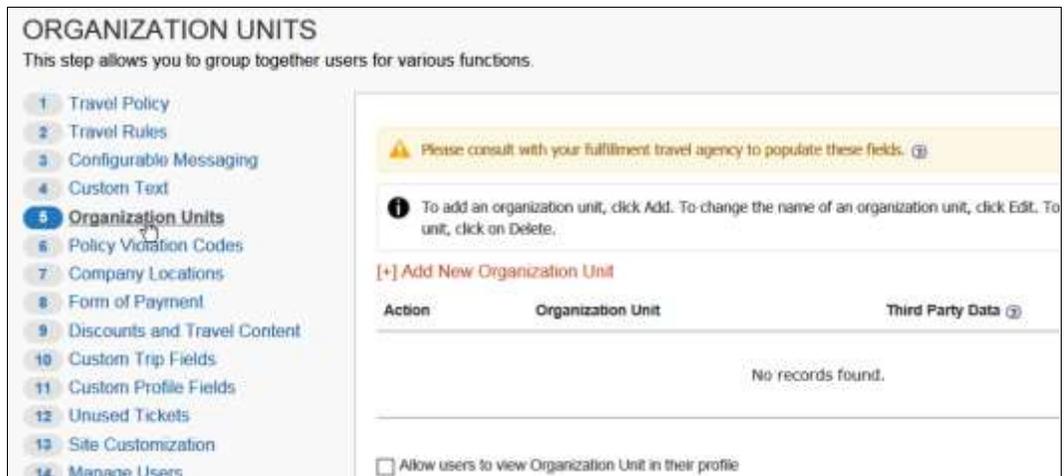


2. Select (enable) the desired properties.

Modify an Organization Unit

► **To modify an organization unit:**

1. In the left-side menu, click **Organization Units**.



- Click **Edit** to the left of the desired organization unit.

[+] Add New Organization Unit

Action	Organization Unit
Edit Delete	HR
Edit Delete	Marketing
Edit Delete	Sales

Allow users to view Organization Unit in their profile

The **Edit Organization Unit** window appears.

Edit Organization Unit ✕

Organization Unit

Third Party Data [?](#)

- Make the appropriate changes.
- Click **OK**.

Delete an Organization Unit

- To delete an organization unit:**

- In the left-side menu, click **Organization Units**.

ORGANIZATION UNITS

This step allows you to group together users for various functions.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units**
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets

Please consult with your fulfillment travel agency to populate these fields.

i To add an organization unit, click Add. To change the name of an organization unit, click Edit. To unit, click on Delete.

[+] Add New Organization Unit

Action	Organization Unit	Third Party Data ?
No records found.		

2. Click **Delete** to the left of the unit.

[+] Add New Organization Unit	
Action	Organization Unit
Edit Delete	HR
Edit Delete	Marketing
Edit Delete	Sales

3. Then:
 - ◆ If no users are assigned to that unit, click **OK** to delete.
 - ◆ If users are assigned to the unit, you will be asked to choose a replacement unit.

Step 6 – Policy Violation Codes

 For complete details, screen captures, and setup steps, refer to the *Approvals, Rules, and Classes/Policies Travel Service Guide*.

Step 7 – Company Locations

Overview

Use the **Company Locations** step to set up company locations for your organization. There are several uses for company locations:

- You can assign users to company locations in order to automatically add a work address to their user records. Users have the ability to update their own home or work addresses in their profile.
- Users can use company locations to search for hotels in Concur Travel. When users search for a hotel using a company location, users can choose from this list of locations.

Use the:

- **Company Locations** tab to manage them manually
- **Import** tab to manage them via import

Map Coordinates

Map Coordinates – also known as *geocoding* – is the process of assigning latitude and longitude to a point, based on street addresses, city, state, and zip code. In Concur Travel, the Map Coordinates option adds the latitude and longitude to a company location. This allows users to search for hotels by company location.

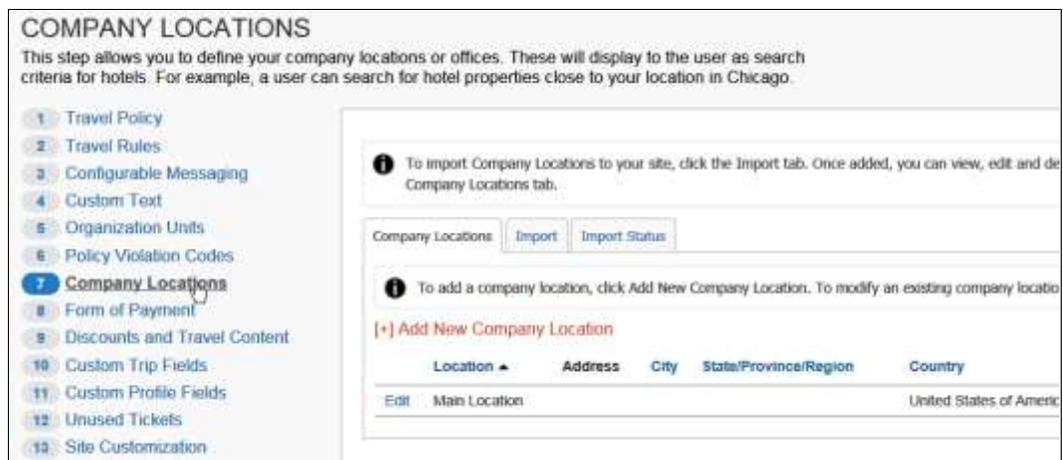
▶▶ **Best Practice tips:**

- It is not required to add the zip code when adding company locations, however results will be more accurate if the zip code is included.
- For best results, do not include suite or floor numbers with the street address. You can enter this information after you geocode but before you save to include it as part of the address.
- When entering company locations, enter the addresses consistently. The company location list is in alpha order by country code. Then, they are listed by city, state, and location name. If you enter the state for one location but not for another, they will appear under separate headings in the locations list.
- For addresses containing the number (#) sign, change this to the word *Number* or abbreviation *No.* Bing Maps does not recognize the # sign.

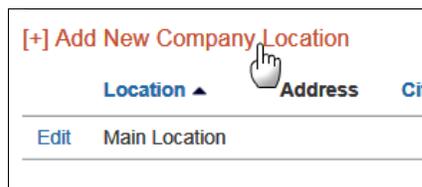
Create a New Company Location Manually

▶ **To create a new company location:**

1. In the left-side menu, click **Company Locations**.



2. Click the **Company Locations** tab, if it is not already selected.
3. Click **Add New Company Location**.



The **Location Detail** window appears.

Location Detail for Company: sjl0402

Add the location name and address and then click the Map Coordinates button. This will apply latitude and longitude for the location and will allow for the location to show on the hotel map in relation to properties in the area. To delete a location, click Delete. Be sure to click Save before moving on to the next step.

Location Name Latitude

Timezone Longitude

(UTC-05:00) Eastern Time (US & Canada)

Address

City State/Province/Region Postal Code Country

4. Make the appropriate choices as described in the following table.

Field	Description/Action
Location Name	Enter a name for the location that will be relevant to the user. This name will appear when selecting locations to find a hotel.
Map Coordinates	Click this button to add the latitude and longitude for the location. If there is more than one possible result, Concur Travel might show choices in a popup box. Click the choice that most closely matches the location you are trying to enter.
Phone, Fax Number, Timezone, Address, City, State, Province, Region	Enter this information for the location.
Zip/Postal Code	Enter the zip or postal code for more accurate geocoding.
Country	Select the appropriate country for the location.

5. Click **Save**.

Edit a Company Location Manually

► To edit a location:

1. In the left-side menu, click **Company Locations**.

COMPANY LOCATIONS
This step allows you to define your company locations or offices. These will display to the user as search criteria for hotels. For example, a user can search for hotel properties close to your location in Chicago.

1 Travel Policy
2 Travel Rules
3 Configurable Messaging
4 Custom Text
5 Organization Units
6 Policy Violation Codes
7 Company Locations
8 Form of Payment
9 Discounts and Travel Content
10 Custom Trip Fields
11 Custom Profile Fields
12 Unused Tickets
13 Site Customization

To import Company Locations to your site, click the Import tab. Once added, you can view, edit and delete Company Locations tab.

Company Locations: Import Import Status

To add a company location, click Add New Company Location. To modify an existing company location, click Edit.

[+] Add New Company Location

Location	Address	City	State/Province/Region	Country
Edit Main Location				United States of America

2. Click the **Company Locations** tab, if it is not already selected.
3. Click **Edit** for the desired location.

[+] Add New Company Location

Location	Address	City	State/Province/Region	Country
Edit Main Location				United States of America

The **Location Detail** window appears.

Location Detail for Company: sjl0402

Add the location name and address and then click the Map Coordinates button. This will apply latitude and longitude for the location and will allow for the location to show on the hotel map in relation to properties in the area. To delete a location, click Delete. Be sure to click Save before moving on to the next step.

Location Name: Main Location Latitude: Longitude:

Timezone: (UTC-05:00) Eastern Time (US & Canada) Map Coordinates

Address:

City: State/Province/Region: Postal Code: Country: United States of America

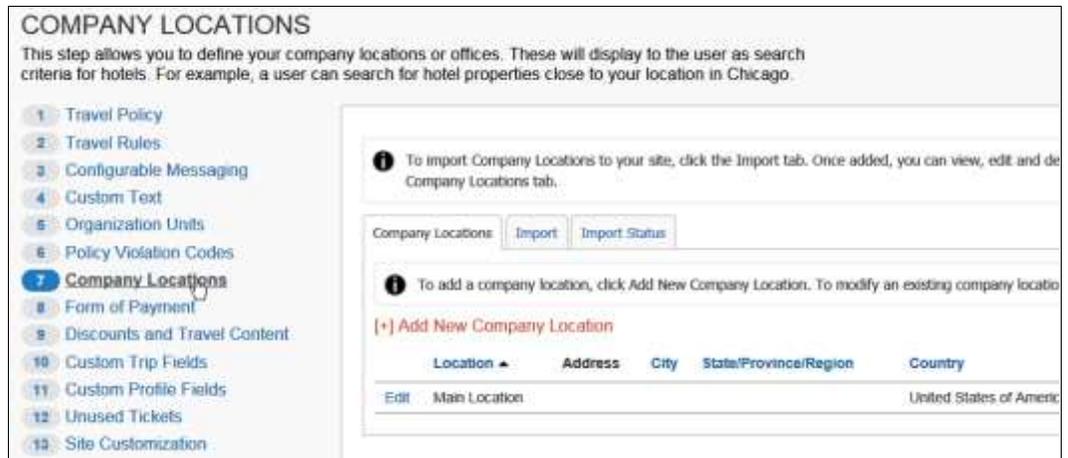
Save Delete Cancel

- Edit the address for the location. (All fields are described above in the *Creating a New Company Location* section.)
- Click **Save**.

Delete a Company Location Manually

► To delete a location:

- In the left-side menu, click **Company Locations**.



- Click the **Company Locations** tab, if it is not already selected.
- Click **Edit** for the desired location.



The **Location Detail** window appears.

Location Detail for Company: sjl0402

Add the location name and address and then click the Map Coordinates button. This will apply latitude and longitude for the location and will allow for the location to show on the hotel map in relation to properties in the area. To delete a location, click Delete. Be sure to click Save before moving on to the next step.

Location Name Latitude

Main Location

Timezone Longitude

Address

City State/Province/Region Postal Code Country

4. Click **Delete**.

Import Company Locations

NOTE: Between 9 AM – 5 PM (your local time), uploads are limited to 5MB or smaller. If you attempt to upload a file that is larger than that, a message appears. You can often reduce file sizes by changing file formats from .csv to Excel. If changing the format is not an option, you can upload larger files after business hours (9 AM – 5 PM your local time).

► ***To import company locations:***

1. In the left-side menu, click **Company Locations**.

COMPANY LOCATIONS

This step allows you to define your company locations or offices. These will display to the user as search criteria for hotels. For example, a user can search for hotel properties close to your location in Chicago.

1 Travel Policy
2 Travel Rules
3 Configurable Messaging
4 Custom Text
5 Organization Units
6 Policy Violation Codes
7 **Company Locations**
8 Form of Payment
9 Discounts and Travel Content
10 Custom Trip Fields
11 Custom Profile Fields
12 Unused Tickets
13 Site Customization

To import Company Locations to your site, click the Import tab. Once added, you can view, edit and delete Company Locations tab.

Company Locations:

To add a company location, click Add New Company Location. To modify an existing company location, click Edit.

[\[+\] Add New Company Location](#)

Location	Address	City	State/Province/Region	Country
Edit	Main Location			United States of America

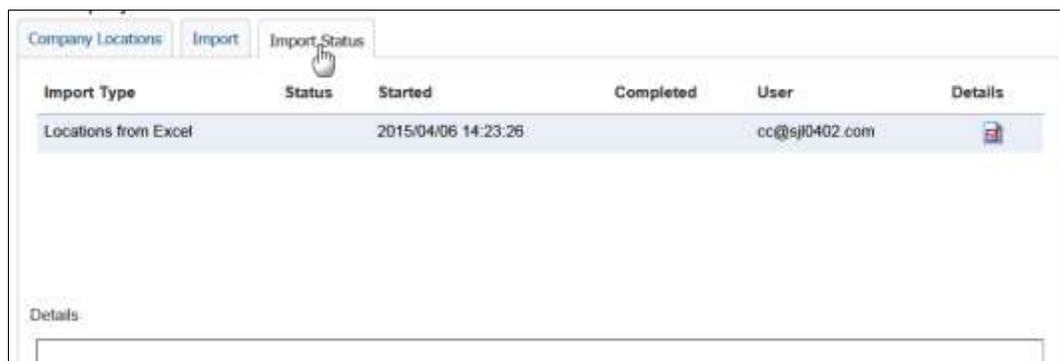
2. Click the **Import** tab.



3. To complete the import file:
 - ◆ Click **Download Sample File**. A spreadsheet is downloaded; instructions are included.
 - ◆ On the spreadsheet, add the company locations you want to import.
 - ◆ Save the spreadsheet as .xml to your computer.
4. To upload:
 - ◆ Click the **Browse/Choose File** (depending on the browser) button.
 - ◆ Locate your saved file.
 - ◆ Click **Upload Your Data**.

► **To view the import details:**

1. Click the **Import Status** tab to see a list of the last 10 imports performed.



2. To see the details on an import, click the icon in the **Details** column.
 - ◆ Details appear toward the bottom, in the **Details** section.
 - ◆ A link will also be provided to download the original import file, with a new column at the end labeled **Errors**.

- ◆ The administrator will be able to identify the issue and make corrections. The admin can then perform an additional import to apply the changes.

▶ **To validate the import:**

Administrators can also validate that the import is complete by clicking on the **Company Locations** tab. The new locations appear once the import has run.

NOTE: Administrators must go to another setup step and then return to the **Company Locations** step to see this updated.

There is a separate batch job that runs nightly that adds the geo-coding for company locations. Admins must wait for that to complete before users/arrangers will see their locations or they can go in and geo-code manually by clicking **Edit** to the left of the location, clicking **Map Coordinates** in the popup, and then **Save**.

The screenshot shows a web form for managing a location. The fields are as follows:

- Location Name:** Concur Bellevue
- Latitude:** (empty)
- Longitude:** (empty)
- Timezone:** (UTC-05:00) Eastern Time (US & Canada)
- Address:** 601 108th Ave NE
- City:** Bellevue
- State/Province/Region:** WA
- Postal Code:** 98004
- Country:** United States of America

A blue button labeled "Map Coordinates" is positioned to the right of the Timezone dropdown menu.

Step 8 – Form of Payment

Overview

Use the **Form of Payment** step to add and assign corporate ghost credit cards:

- ◆ There is no limit on the number of corporate ghost cards supported.
- ◆ The admin can define:
 - Which segment types should be charged to the card
 - Whether personal cards are allowed

The AirPlus feature on this page is not available at this time.

 For information about different forms of payment, how they may affect each other, and configuration points to watch, refer to the *Form of Payment Travel Service Guide*.

Add a New Corporate Ghost Card

► To add a new corporate ghost card:

1. In the left-side menu, click **Form of Payment**.

FORM OF PAYMENT
This step allows you to define the form of payment options available to your users. Users are required to provide a personal form of payment unless a corporate ghost card is added.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment**
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users

Corporate Card Administration
[+] Add Corporate Card

Payment Options
Please select the travel configuration you want to update.
sjlSept15 (US) ▼

Allow users to reserve hotels with a personal card ⓘ
 Allow users to charge air and rail to a personal card ⓘ

AirPlus Configuration ⓘ

Use A.I.D.A if Company Account is not accepted ⓘ
 Show popup with A.I.D.A MasterCard for print during car and hotel reservations
 Send Confirmation Fax to Hotel ⓘ

Save

2. Click **Add Corporate Card**.

Corporate Card Administration
[+] Add Corporate Card
Payment Options
Please select the travel configuration you want to u

The **Credit Card Detail** window appears.

Credit Card Detail for Company: sjl0402

To add a corporate ghost card, fill in the fields below. All fields are required. A corporate ghost card is a single card used by multiple employees to book travel.

Billing Information

Credit Card Number Card Type Expiration Date Credit Card Name

Address

City State/Province/Region Postal Code

Country
United States of America

3. Make the appropriate choices as described in the following table.

Field	Description/Action
Billing Information – all fields are required	
Credit Card Number	Enter the card number. Do not enter dashes, spaces or periods – only the number.
Card Type	Select the appropriate card type.
Expiration Date	Select the expiration date. NOTE: Travel assumes that the expiration date is the <i>last</i> day of the selected month. For example, if you select February 2016, then the expiration date is February 28 2016.
Credit Card Name	Enter the name for the card.
Billing Address – all fields are required	
<all fields>	Enter as appropriate.

Scroll down to the next section.

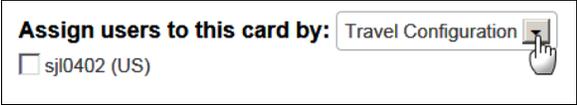
Billing Properties

Allow Air
 Allow Hotel [?]
 Allow Instant Purchase
 Allow TraveIfusion/webfares:

Allow Rail
 Allow Car [?]
 Enable E-Receipts [?]
 Allow Form of Payment API access [?]

Assign users to this card by:

Field	Description/Action
Billing Properties	
Allow Air Allow Rail Allow Hotel Allow Car Allow Instant Purchase Enable E-Receipts Allow TraveIfusion/webfares	Select (enable) the check boxes for the segment types that can be charged/guaranteed to the card. Air and Rail will be defaulted to ON.
Allow Form of Payment API Access	Select (enable) to pass profile data from Concur to third parties, such as TripLink vendors and fulfillment TMCs.

Field	Description/Action
<users>	
Assign users to this card by	<p>Click one of these:</p> <ul style="list-style-type: none"> • Travel Configuration • Organization Unit • Individual User <p>Travel Configuration: If you select <i>Travel Configuration</i>, the available travel configurations appear.</p>  <p>Select (enable) the desired configuration(s).</p> <p>Organization Unit: If you select <i>Organization Unit</i>, the available organization units appear.</p>  <p>Select the desired unit.</p> <p>Individual User: If you select <i>Individual User</i>, the available users appear.</p>  <p>Select the desired user(s) and click Add.</p>

4. Click **Save**. Once a card has been added, the screen refreshes and the grid updates.

[+] Add Corporate Card			
Action	Credit Card Name	Credit Card Number ⓘ	Expiration Date
Edit Delete	 Test Visa	xxxxxxxxxxxx1111	05/2020

Payment Options

Define Payment Options

Admins also have the ability to define the payment options. These are set at a configuration level and provide users the ability to override the corporate ghost card with a personal card.

The admin can define:

- Whether to allow users to reserve hotel with a personal card
- Whether to allow users to charge air/rail to a personal card

Action	Credit Card Name	Credit Card Number ?
Edit Delete	Test Visa	xxxxxxxxxxxx1111

Payment Options
Please select the travel configuration you want to update.

Allow users to reserve hotels with a personal card ?

Allow users to charge air and rail to a personal card ?

▶ To define payment options:

1. In the left-side menu, click **Form of Payment**.

FORM OF PAYMENT
This step allows you to define the form of payment options available to your users. Users are required to provide a personal form of payment unless a corporate ghost card is added.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment**
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users

Corporate Card Administration
[\[+\] Add Corporate Card](#)

Payment Options
Please select the travel configuration you want to update.

Allow users to reserve hotels with a personal card ?

Allow users to charge air and rail to a personal card ?

AirPlus Configuration ?

Use A.I.D.A If Company Account is not accepted ?

Show popup with A.I.D.A MasterCard for print during car and hotel reservations

Send Confirmation Fax to Hotel ?

[Save](#)

2. In the **Payment Options** section, select the desired travel configuration.
3. Select (enable) one or more of these settings:
 - ◆ Allow users to reserve hotels with a personal card
 - ◆ Allow users to charge air and rail to a personal card

4. Click **Save**.

Edit a Corporate Ghost Card

► **To edit a corporate ghost card:**

1. In the left-side menu, click **Form of Payment**.

FORM OF PAYMENT
This step allows you to define the form of payment options available to your users. Users are required to provide a personal form of payment unless a corporate ghost card is added.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment**
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users

Corporate Card Administration
[+] Add Corporate Card

Payment Options
Please select the travel configuration you want to update.
sjlSept15 (US) ▼

Allow users to reserve hotels with a personal card ⓘ

Allow users to charge air and rail to a personal card ⓘ

AirPlus Configuration ⓘ

Use A.I.D.A if Company Account is not accepted ⓘ

Show popup with A.I.D.A MasterCard for print during car and hotel reservations

Send Confirmation Fax to Hotel ⓘ

Save

2. Click **Edit** to the left of the desired card.

Action	Credit Card Name	Credit Card Number ⓘ	Expiration Date
Edit Delete	VISA Test Visa	xxxxxxxxxxxx1111	05/2020

The **Credit Card Detail** window appears.

Credit Card Detail for Company: sjl0402

To add a corporate ghost card, fill in the fields below. All fields are required. A corporate ghost card is a single card used by multiple employees to book travel.

Billing Information

Credit Card Number	Card Type	Expiration Date	Credit Card Name
xxxxxxxxxxxx1111	VISA	5 / 2020	Test Visa

Billing Address

Address
500 West 5th

City: Seattle State/Province/Region: Washington Postal Code: 98125

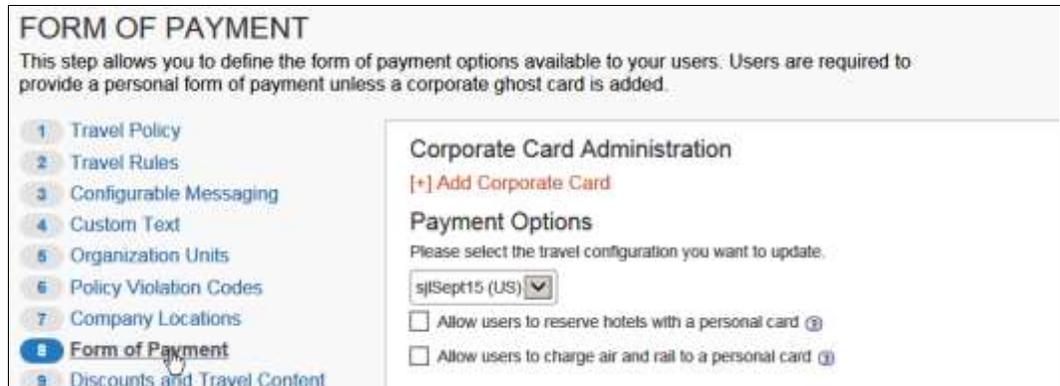
Country:

3. Make the desired changes.
4. Click **Save**.

Delete a Corporate Ghost Card

▶ **To delete a corporate ghost card:**

1. In the left-side menu, click **Form of Payment**.



2. Click **Delete** to the left of the desired card.



3. Click **Yes** for the confirmation message.

Enable AirPlus A.I.D.A.

This feature is currently not available.

Step 9 – Discounts and Travel Content

Overview

Use the **Discounts and Travel Content** step to:

- Add corporate discounts for air, car, hotel, and rail
- Set the preference level for **airline** and **hotel** vendors that are not available in the company's reservation system (GDS)

NOTE: You can set preference levels; you cannot use any other features (like discounts) on this page for these vendors.

- Upload hotel property discounts
- Enable all pertinent direct connect provider content (these are typically vendors who provide access to content not available via the GDS)
- Enable Travelfusion providers
- Enable government rates

⚠ IMPORTANT: Consult with your travel agency before adding/modifying/deleting anything in this step as it often requires TMC intervention for accurate pricing.
Your agency will provide the codes needed to access your discounts.

**Add Corporate Discounts for Air, Car, Hotel, and Rail;
 Set the Preference Level for Non-GDS Airline and Hotel Vendors;
 Upload Hotel Property Discounts**

 For complete details, screen captures, and setup steps, refer to the *Discounts Travel Service Guide*.

Enable a Direct Connect Provider

▶ **To enable a direct connect provider:**

1. In the left-side menu, click **Discounts and Travel Content**.



2. Select the desired configuration.
3. Click the **Direct Connect** tab.



This section contains all the direct connect providers available based on the regions you have enabled for your site. The most common ones are listed below.

REQUIREMENTS FOR EACH AIR CONNECTOR

For this feature/option, **additional steps are required**. In some cases, the required steps must be completed **before** using the Travel setup wizard (like obtaining a vendor agreement).

 Refer to the Travel Service Guide for each vendor.

Southwest Airlines

 For complete details, screen captures, and setup steps, refer to the *Southwest Direct Connect Travel Service Guide*.

Air Canada

 For complete details, screen captures, and setup steps, refer to the *Air Canada Direct Connect Travel Service Guide*.

Cleartrip

 For complete details, screen captures, and setup steps, refer to the *Cleartrip (Air) Travel Service Guide*.

Travelfusion

 For complete details, screen captures, and setup steps, refer to the *Travelfusion Direct Connect Travel Service Guide*.

REQUIREMENTS FOR EACH RAIL CONNECTOR

For this feature/option, **additional steps are required**. In some cases, the required steps must be completed **before** using the Travel setup wizard (like obtaining a vendor agreement).

 Refer to the Travel Service Guide for each vendor.

General

General

Allow departure time to be specified to the nearest quarter hour

Select the check box to allow departure time to the nearest quarter hour.

Amtrak

 For complete details, screen captures, and setup steps, refer to the *Amtrak Direct Connect Travel Service Guide*.

BIBE (Bahn Internet Booking Engine)

 For complete details, screen captures, and setup steps, refer to the *Deutsche Bahn (BIBE) Direct Connect Travel Service Guide*.

SNCF

 For complete details, screen captures, and setup steps, refer to the *SNCF Direct Connect Travel Service Guide*.

Trainline

 For complete details, screen captures, and setup steps, refer to the *Trainline Direct Connect Travel Service Guide*.

Evolvi

 For complete details, screen captures, and setup steps, refer to the *Evolvi Direct Connect Travel Service Guide*.

VIA Rail

 VIA Rail Enable

Corporate Discount Code

When making a VIA Rail booking and a Ghost Card is in effect, allow the use of other credit cards as well

To enable:

Field	Description/Action
Enable	Select to enable.
Corporate Discount Code	Enter the code.
When making a VIA Rail booking and a Ghost Card is in effect, allow the use of other credit cards as well	Select, if desired.

REQUIREMENTS FOR EACH CAR CONNECTOR

For this feature/option, **additional steps are required**. In some cases, the required steps must be completed **before** using the Travel setup wizard (like obtaining a vendor agreement).

 Refer to the Travel Service Guide for each vendor.

Sixt

 For complete details, screen captures, and setup steps, refer to the *Sixt Direct Connect Travel Service Guide*.

The discount code for Sixt is entered on the **Discounts** tab.

 For complete details, screen captures, and setup steps, refer to the *Discounts Travel Service Guide*.

Hertz

 For complete details, screen captures, and setup steps, refer to the *Hertz Direct Connect Travel Service Guide*.

The discount code for Hertz is entered on the **Discounts** tab.

 For complete details, screen captures, and setup steps, refer to the *Discounts Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* in the appendix of this guide.

REQUIREMENTS FOR EACH HOTEL CONNECTOR

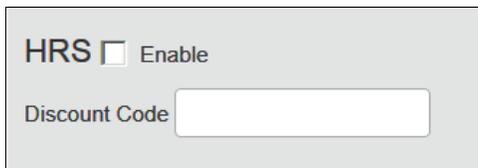
For this feature/option, **additional steps are required**. In some cases, the required steps must be completed **before** using the Travel setup wizard (like obtaining a vendor agreement).

 Refer to the Travel Service Guide for each vendor.

hotel.de

 For complete details, screen captures, and setup steps, refer to the *HOTEL DE Direct Connect Travel Service Guide*.

HRS



HRS Enable
Discount Code

NOTE: HRS and hotel.de cannot both be activated.

To enable:

Field	Description/Action
Enable	Select to enable.
Corporate Discount Code	Enter the code.

Related option(s) are **hidden, set by default, and cannot be changed:**

Field	Description/Action
Availability timeout	Unavailable
Main customer key	Unavailable
Frequent guest card key	Unavailable
Notify customer	Unavailable
Send notification to additional e-mail addresses Additional e-mail addresses	Unavailable

When you select **Enable**, the country section appears at the bottom of the **Hotel Connectors** section. Select the desired country.

Hilton

Hilton Enable

Discount Code

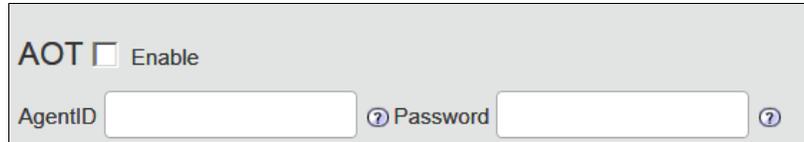
To enable:

Option	Description/Action
Enable	Select to enable direct connect.
Discount Code	Enter the discount code.

When you select **Enable**, the country section appears at the bottom of the **Hotel Connectors** section. Select the desired country.

AOT

⚠ IMPORTANT: AOT is currently available **only** for AMEX in Australia.



To enable:

Option	Description/Action
Enable	Select to enable.
Agent ID	Enter the agent ID.
Password	Enter the password.

When you select **Enable**, the country section appears at the bottom of the **Hotel Connectors** section. For AOT, select *Australia*.



Booking.com, CDS, Direct Connect Hotels (Cleartrip Hotels), HCorpo, iAlbatros, Premier Inn, Rakuten Travel, The Hotel Network (THN), The Lido Group

 For complete details, screen captures, and setup steps, refer to the *Hotel Service Content Suppliers Travel Service Guide*.

REQUIREMENTS FOR EACH GROUND CONNECTOR

GroundSpan, SummitQwest, Talixo

 For complete details, screen captures, and setup steps, refer to the *Ground Content Suppliers Travel Service Guide*.

Enable Travelfusion Suppliers

 For complete details, screen captures, and setup steps, refer to the *Travelfusion Travel Service Guide*.

Enable Government Rates

NOTE: This tab appears only if you have a United States configuration.

Customers who conduct business with the US Government often are granted access to special, discounted government rates.

NOTE: Please work with your fulfillment TMC to ensure access to these rates has been granted in the GDS prior to enabling in Concur.



For complete details, screen captures, and setup steps, refer to the *Government Features Travel Service Guide*.

Step 10 – Custom Trip Fields

NOTE: Best practice is to **not** allow personal, sensitive, or uniquely identifying information in custom fields.

Overview

You can use custom trip fields to create questions for the user to answer during the booking process. Concur automatically provides two custom trip fields but you can create an unlimited number of additional custom profile fields.

Use the **Custom Trip Fields** step to:

- Configure and enable custom trip fields
- Add more custom trip fields

⚠ IMPORTANT: Because travel agencies use custom fields to pass information into the booking system, you should not add/modify/delete these fields unless you first verify with your travel agency or Concur Client Support. If you do not verify first, you risk causing serious issues with profiles and itineraries in the agency booking system.

Considerations for Creating Custom Fields

NOTE: Best practice is to **not** allow personal, sensitive, or uniquely identifying information in custom fields.

TREATMENT OF EXISTING DATA

When you create new custom fields, you must consider how existing data might be affected. Travel will treat existing data as follows:

- If you assign valid values where there were none before, existing data will not be affected but may not display correctly.
- If you change values in a list that are in use, existing data will be updated.
- If you delete a value from a list, existing data with that value will be cleared.
- If you change the data type to numeric, any non-numeric data will be left unaffected until the next time you edit that employee, at which time a valid value must be entered.

DETERMINE THE TYPES OF FIELDS

For each new custom field, determine the field type. The following types of fields are available.

Field type	Description/Action
Text/Drop-Down	Creates a text or dropdown menu For this field type: <ol style="list-style-type: none">1. Set the number of characters available in the Max Length field.2. Choose whether to enter optional values.<ul style="list-style-type: none">◆ If you enter optional values, those values will appear in a dropdown menu.◆ If you leave this blank, the user will be able to type information into the field.3. To enter optional values, enter the option name and stored value and then click Add.4. Use the Up, Down, Change, and Delete buttons to modify the values.
Long Text	Creates a text field For this field type, set the number of characters available in the Maximum Length field. Users will be able to type in the field up to the maximum length and will not be presented with a dropdown menu.
Number	Creates a list of numbers
Yes/No	Create a Yes/No list

ORDER OF DISPLAY

By default, fields display to the user in alphabetical order. If you place a number in front of the text, then the field will appear first.

GUEST TRAVEL BOOKINGS

Be aware that all custom trip fields apply automatically to Guest Travel bookings.

Configure and Enable a Custom Trip Field

► To configure a new custom trip field:

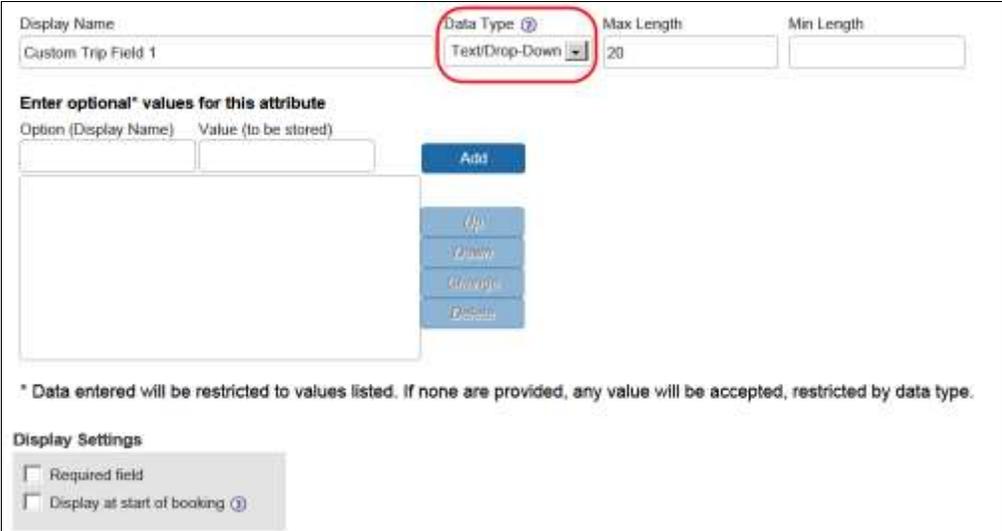
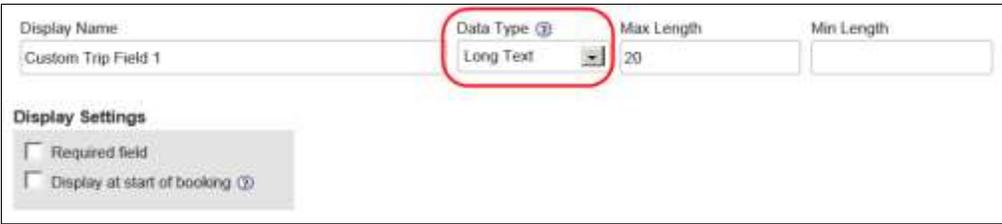
1. In the left-side menu, click **Custom Trip Fields**.

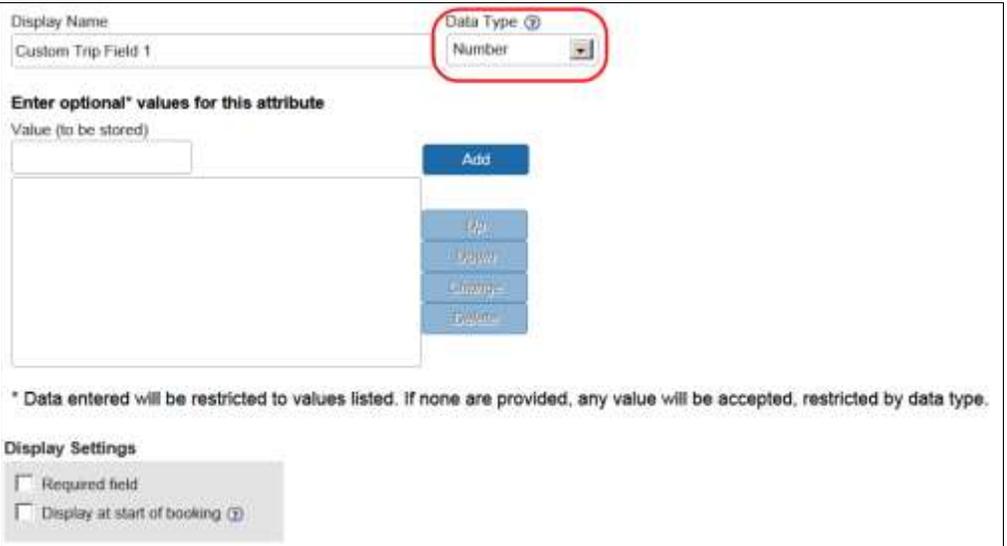
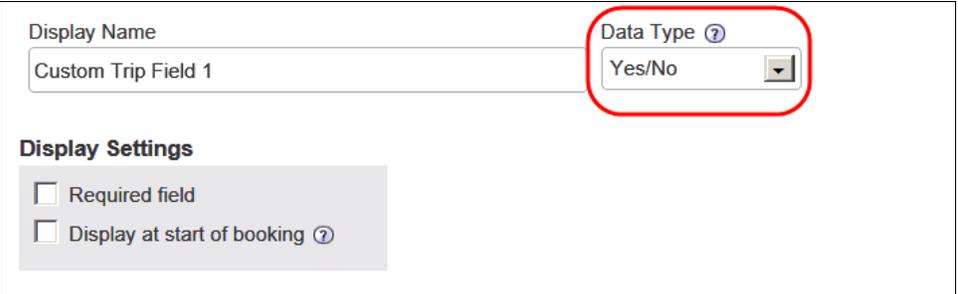
Enabled	Display Name	Database Name	Data Type	Display Settings
<input type="checkbox"/>	Custom Trip Field 1	CustomTripField1	Long Text	Optional, End
<input type="checkbox"/>	Custom Trip Field 2	CustomTripField2	Long Text	Optional, End

2. Select the desired configuration.
3. Click the custom trip field name (ex: Custom Trip Field 1).

4. Make the appropriate choices as described in the following table.

Field	Description/Action
Display Name	Text that should appear to the user. Example: What is your purpose of trip? NOTE: Best practice is to not allow personal, sensitive, or uniquely identifying information in custom fields.

Field	Description/Action
Data Type	Select one of these: <ul style="list-style-type: none"> • Text /Drop-Down • Long Text • Number • Yes/No
For Text/Drop-Down	
 <p>* Data entered will be restricted to values listed. If none are provided, any value will be accepted, restricted by data type.</p>	
Max Length / Min Length	Minimum and maximum character length
Enter optional values for this attribute	To create the dropdown menu, add each option to the Option field and click Add . If you want a different value than the display name, then also add the Value . Example: Purpose of trip display options are business, leisure and meetings but the value added to the PNR for the TMC is a two letter code.
For Long Text	
	
Max Length / Min Length	Minimum and maximum character length

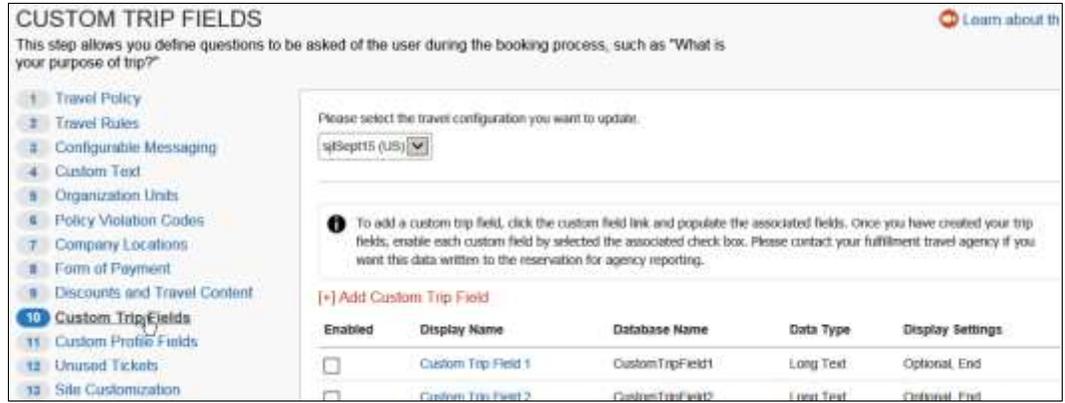
Field	Description/Action
For Number	
 <p>Display Name: Custom Trip Field 1</p> <p>Data Type: Number</p> <p>Enter optional* values for this attribute</p> <p>Value (to be stored):</p> <p>Add</p> <p>Up, Down, Clear, Delete</p> <p>* Data entered will be restricted to values listed. If none are provided, any value will be accepted, restricted by data type.</p> <p>Display Settings</p> <p><input type="checkbox"/> Required field</p> <p><input type="checkbox"/> Display at start of booking</p>	
Enter optional values for this attribute	To create the dropdown menu, add each option to the Value field and click Add .
For Yes/No	
 <p>Display Name: Custom Trip Field 1</p> <p>Data Type: Yes/No</p> <p>Display Settings</p> <p><input type="checkbox"/> Required field</p> <p><input type="checkbox"/> Display at start of booking</p>	
For all types	
Required Field	Select this check box if this question must be answered by the user to complete the booking.
Display at Start of Booking	Select this check box if you want the question asked at the beginning of the booking instead of at the end.

5. Click **Save**.
6. Once configured, click the check box in the **Enable** column.

Add More Custom Trip Fields

► To add more custom fields:

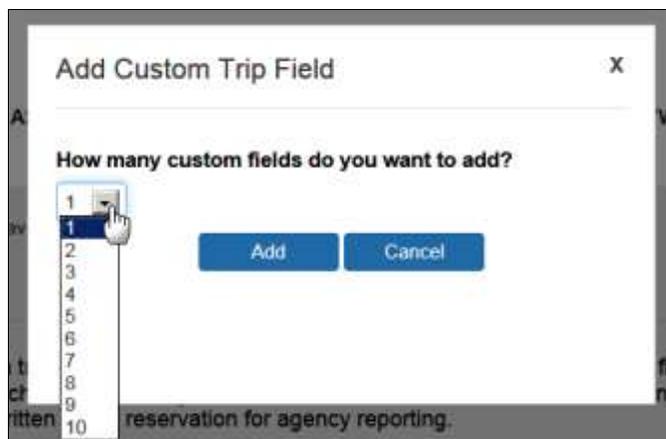
1. In the left-side menu, click **Custom Trip Fields**.



2. Select the desired configuration.
3. Click the **Add Custom Trip Field** link.



The **Add Custom Trip Field** popup appears.



4. Select the desired number, between 1 and 10.
5. Click **Add**. The new fields appear at the bottom of the grid.

6. Configure and enable the fields as described in *Configure and Enable a Custom Trip Field* in this guide.

Step 11 – Custom Profile Fields

NOTE: Best practice is to **not** allow personal, sensitive, or uniquely identifying information in custom fields.

Overview

You can use custom profile fields to collect additional information in the user's profile. Concur automatically provides nine custom profile fields but you can create an unlimited number of additional custom profile fields.

Use the **Custom Profile Fields** step to:

- Configure and enable custom profile fields
- Add more custom profile fields

IMPORTANT

- Because travel agencies use custom fields to pass information into the booking system, you should not add/modify/delete these fields unless you first verify with your travel agency or Concur Client Support. If you do not verify first, you risk causing serious issues with profiles and itineraries in the agency booking system.
- For Concur Standard Travel and Expense customers, custom profile fields are not synchronized between the two systems. If both systems need to track the same item, such as a cost center, then a custom field will need to be created and maintained separately within both systems.

Considerations for Creating Custom Fields

NOTE: Best practice is to **not** allow personal, sensitive, or uniquely identifying information in custom fields.

TREATMENT OF EXISTING DATA

When you create new custom fields, you must consider how existing data might be affected. Travel will treat existing data as follows:

- If you assign valid values where there were none before, existing data will not be affected but may not display correctly.
- If you change values in a list that are in use, existing data will be updated.
- If you delete a value from a list, existing data with that value will be cleared.
- If you change the data type to numeric, any non-numeric data will be left unaffected until the next time you edit that employee, at which time a valid value must be entered.

DETERMINE THE TYPES OF FIELDS

For each new custom field, determine the field type. The following types of fields are available.

Field type	Description/Action
Text/Drop-Down	Creates a text or dropdown menu For this field type: <ol style="list-style-type: none">1. Set the number of characters available in the Max Length field.2. Choose whether to enter optional values.<ul style="list-style-type: none">◆ If you enter optional values, those values will appear in a dropdown menu.◆ If you leave this blank, the user will be able to type information into the field.3. To enter optional values, enter the option name and stored value and then click Add.4. Use the Up, Down, Change, and Delete buttons to modify the values.
Long Text	Creates a text field For this field type, set the number of characters available in the Maximum Length field. Users will be able to type in the field up to the maximum length and will not be presented with a dropdown menu.
Number	Creates a list of numbers
Yes/No	Create a Yes/No list

ORDER OF DISPLAY

By default, fields display to the user in alphabetical order. If you place a number in front of the text, then the field will appear first.

Configure and Enable a Custom Profile Field

► To configure a custom profile field:

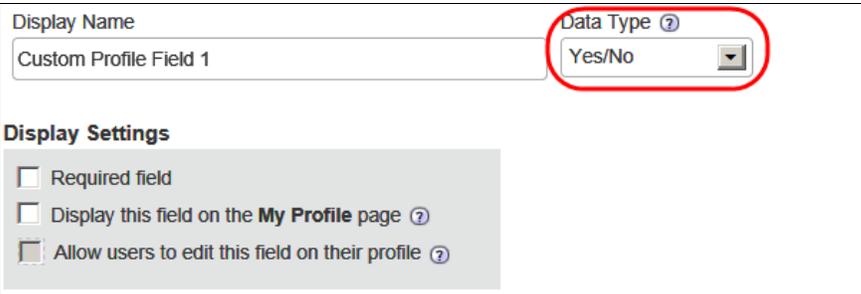
1. In the left-side menu, click **Custom Profile Fields**.

2. Select the desired configuration.
3. Click the name of the custom field (ex: Custom Profile Field 1).

4. Make the appropriate choices as described in the following table.

Field	Description/Action
Display Name	Text that should appear to the user. Example: What is your purpose of trip? NOTE: Best practice is to not allow personal, sensitive, or uniquely identifying information in custom fields.

Field	Description/Action
Data Type	Select one of these: <ul style="list-style-type: none"> • Text /Drop-Down • Long Text • Number • Yes/No
Send to Sabre Profiles	This check box may appear if Sabre Profiles is enabled. If so, it is selected (enabled) by default and cannot be changed.
For Text/Drop-Down	
Max Length / Min Length	Minimum and maximum character length
Enter optional values for this attribute	To create the dropdown menu, add each option to the Option field and click Add . If you want a different value than the display name, then also add the Value . Example: Purpose of trip display options are business, leisure and meetings but the value added to the PNR for the TMC is a two-letter code.
For Long Text	
Max Length / Min Length	Minimum and maximum character length

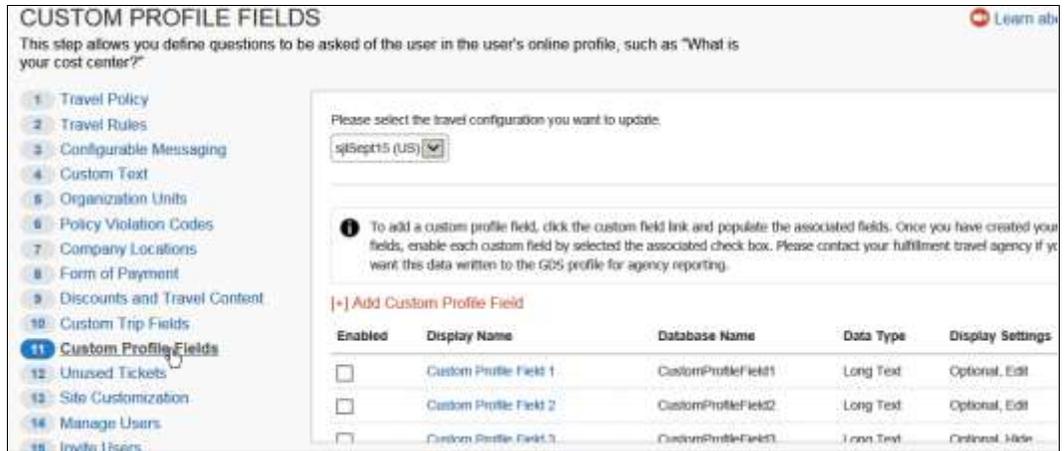
Field	Description/Action
For Number	
 <p>* Data entered will be restricted to values listed. If none are provided, any value will be accepted, restricted by data type.</p>	
Enter optional values for this attribute	To create the dropdown menu, add each option to the Value field and click Add .
For Yes/No	
	
For all types	
Required Field	Select this check box if this question must be answered by the user to complete the booking.
Display this field on the My Profile page	Select this check box to make this field appear on users' profile pages. If you clear this check box, the custom field will appear only to administrators via the User step; the user will not be able to view or edit this field in the profile.
Allow users to edit this field on their profile	Select this check box to allow users to edit the contents of this field on their profile pages. If you clear this check box, the field will appear to users but will be grey and not available for editing. Administrators will be able to edit the field via the User step.

5. Click **Save**.
6. Once configured, click the check box in the **Enable** column.

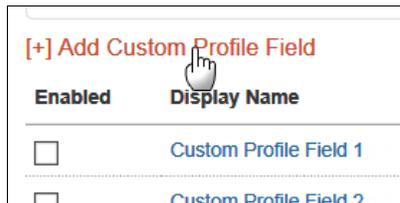
Add More Custom Profile Fields

► **To add more custom fields:**

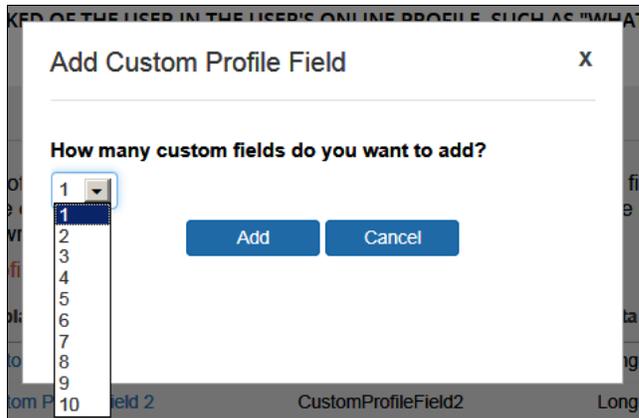
1. In the left-side menu, click **Custom Profile Fields**.



2. Select the desired configuration.
3. Click the **Add Custom Profile Field** link.



The **Add Custom Profile Field** popup appears.



4. Select the desired number, between 1 and 10.
5. Click **Add**. The new fields appear at the bottom of the grid.
6. Configure and enable the fields as described in *Configure and Enable a Custom Profile Field* in this guide.

Step 12 – Unused Tickets

Overview

Use the **Unused Tickets** section to view unused tickets for your organization. This allows you to take appropriate action to use, refund, or delete unused tickets. Users are shown their unused tickets during the booking process.

 **IMPORTANT:** Customers will want to work with their TMC to determine how unused tickets will be used. Concur Travel only alerts the user that an unused ticket is on file. The TMC actually processes the exchange.

 For complete details, screen captures, and setup steps, refer to the *Unused Tickets Travel Service Guide*.

Step 13 – Site Customization

Overview

On the **Site Customization** setup step, use the **Site Wide Settings** tab to:

- Add your company logo
- Define your self-registration code and email

NOTE: If a site has Expense enabled, the **Self-Registration** section will be hidden. If a site was Travel-only with Self-Registration enabled and then Expense is added, the Self-Registration feature will be disabled and hidden.

On the **Site Customization** setup step, use the **Configuration Settings** tab allow/disallow:

- Refundable fares
- Policy by leg (Flex faring)
- Default to Mixed Classes for Class of Service (Flex faring)
- Booking hotels that require a deposit

Upload a Company Logo

Your logo will appear in the upper right corner of the page.

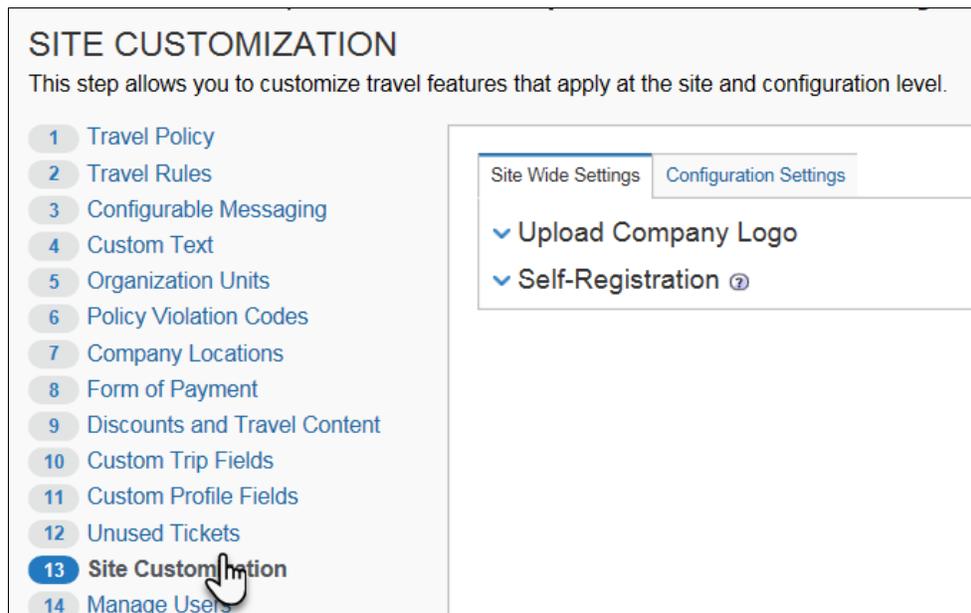
Note the following:

- Company logos can be either .jpg or .gif files.
- They must be under 100kb in size.
- The image should be no more than 55 pixels in height and 200 pixels in length.

⚠ IMPORTANT: Anything outside of these parameters will be rejected.

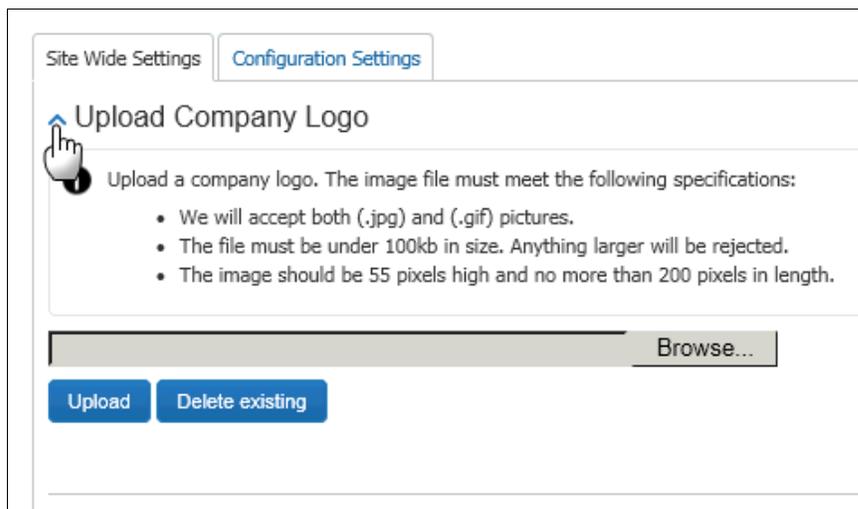
▶ **To upload a company logo:**

1. In the left-side menu, click **Site Customization**.



2. Click the **Site Wide Settings** tab, if it is not already selected.

- Expand the **Upload Company Logo** section.



- Click **Browse/Choose File** (depending on the browser) to locate your company logo.
- Click **Upload** once you locate the logo file.

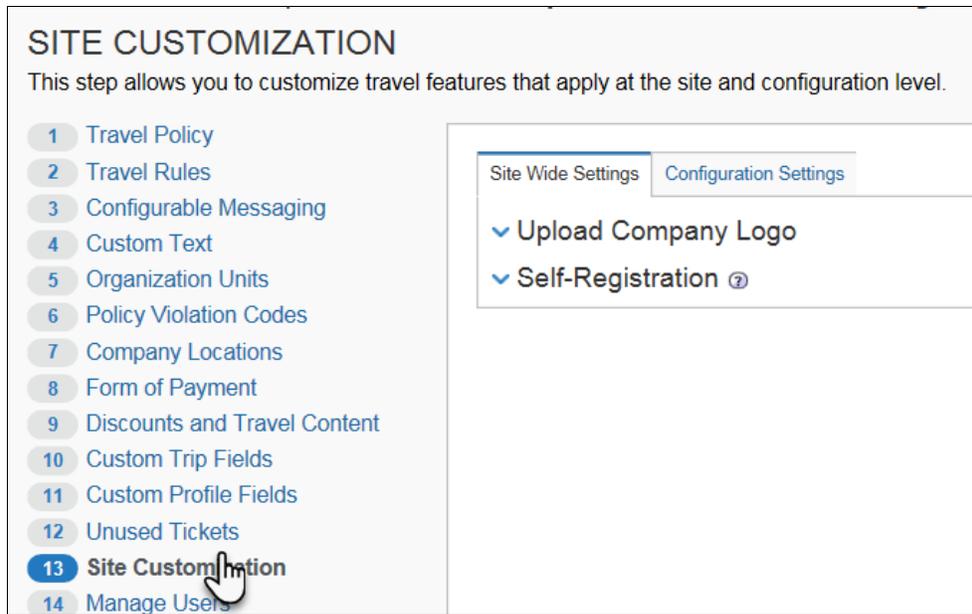
Set Up Self-Registration

 For complete details, screen captures, and setup steps, refer to the *Self-Registration Travel Service Guide*.

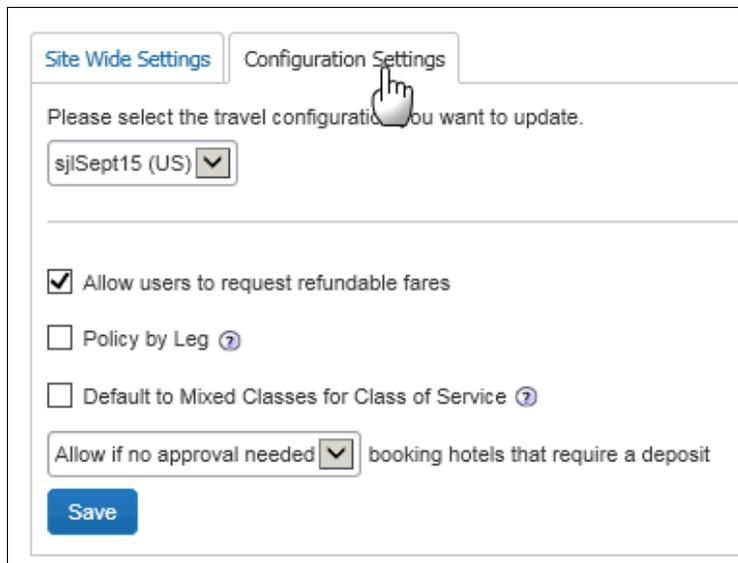
Allow/Disallow Refundable Fares;
Allow/Disallow Booking Hotels with Deposit;
Allow/Disallow Policy by Leg (Flex Faring);
Default to Mixed Classes (Flex Faring)

▶ **To change these settings:**

- In the left-side menu, click **Site Customization**.



2. Click the **Configuration Settings** tab.



3. Select the desired configuration.
4. Make the appropriate choices as described in the following table.

Field	Description/Action
Allow users to request refundable fares	Select (enable) this check box as appropriate.

Field	Description/Action
Policy by Leg	For flex faring, select (enable) this check box to allow policy and LLF evaluation per leg , which may result in multiple violations per trip.  Refer to the <i>Flex-Faring Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Default to Mixed Class for Class of Service	For flex faring, select (enable) this check box to default the Class of Service dropdown in the Travel Wizard to <i>Mixed Classes</i> and ensure the search results for all cabins allowed for the user will be returned.  Refer to the <i>Flex-Faring Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
...booking hotels that require a deposit	Select one of these: <ul style="list-style-type: none"> • Allow if no approver needed • Do not allow

5. Click **Save**.

Step 14 – Manage Users

Overview

The menu and process differ depending on:

- Whether you implement Travel **with** Expense or **without** Expense
– and –
- Whether you are adding users or updating existing user information
– and –
- Whether you are completing the task manually (using the user interface) or via import

All situations are described on the following pages.

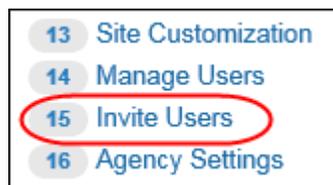
MENUS

Menu options differ if you are implementing Travel **with** Expense or **without** Expense.

Travel **with** Expense:



Travel **without** Expense:



If implementing Travel **with** Expense, the **Invite Users** option does not appear. That task is completed on the Users page in Product Settings for Concur Expense.

ADD AND MODIFY USER INFORMATION MANUALLY

If you are implementing Travel **without** Expense, you can use the **Manage Users** step in Travel setup to manually add/modify/delete users, change passwords, and manage other information for Travel users.

If you are implementing Travel **with** Expense:

- *Add* users on the **Users** page in Product Settings for Concur Expense.
- *Modify* user information using the **Manage Users** step in the Travel Setup Wizard.

ADD AND MODIFY USER INFORMATION VIA IMPORT

If you are implementing Travel **without** Expense, you can use the import in the **Manage Users** step in Travel setup to import new users as well as modify existing user information.

If you are implementing Travel **with** Expense:

- *Add* users via import on the **Users** page in Product Settings. On the **Users** page, click **Import Users** to download a spreadsheet.
- *Modify* user information via import using the **Manage Users** step in the Travel Setup Wizard.

NOTE: Between 9 AM – 5 PM (your local time), uploads are limited to 5MB or smaller. If you attempt to upload a file that is larger than that, a message appears. You can often reduce file sizes by changing file formats from .csv to Excel. If changing the format is not an option, you can upload larger files after business hours (9 AM – 5 PM your local time).

Manually Add a New User – Travel WITHOUT Expense

► To add a new user:

1. In the left-side menu, click **Manage Users**.

MANAGE USERS
This step allows you to add new users, search for existing users and update their information, as well as deactivate users.

Travel Policy
Travel Rules
Configurable Messaging
Custom Text
Organization Units
Policy Violation Codes
Company Locations
Form of Payment
Discounts and Travel Content
Custom Trip Fields
Custom Profile Fields
Unused Tickets
Site Customization
Manage Users
Invite Users
Agency Settings

To add a new user manually, click New User. To edit a user's details, click Edit to the left of the user's name. To import Users, click Import Users. To view the profile icon to the right of their name.

Administer Users Search: Include deactivated users

[+] New User

Last Name / First Name	Email Address	Active	Profile Access
Chandler, Chris	cc@sjlSept15.com	Yes	

2. Click **New User**. The **User Detail** window appears.

User Detail for: sjlO402

Travel Policy: Manager:

Login ID: Email Address: Password: Retype Password:

Name

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.

Title: Suffix: First Name: Last Name: Middle Name:

3. Make the appropriate choices as described in the following table.

Field	Description/Action
Travel Policy	Select the travel policy that will apply to the user.
Manager	<p>Select the user's manager's name.</p> <ul style="list-style-type: none"> • If you are planning to use approvals or notifications, every user should have a manager displayed in this field. Click Edit to search for and select a manager. • If approvals or notifications are not used or will be handled by a designated travel approver, it is not necessary to select a manager in this field. <p>You can also define at the travel-class level via the Travel Policy step.</p>

Field	Description/Action
Login ID	<p>Enter the user's ID for logging in to Travel.</p> <ul style="list-style-type: none"> ONLY the following special characters are allowed: hyphen, at symbol, period, and underscore. (- @ . _) Leading and trailing spaces are permitted. Verify that you have not entered one in error. The LoginID must be unique across all Concur products. If a LoginID is currently in use in any Concur product, it cannot be assigned again unless the original occurrence is changed. For example, assume that a LoginID was assigned in error. That LoginID can only be used again if an admin (either manually or via import) renames the original occurrence, allowing the LoginID to be used again.
Email Address	<p>Enter the user's email address</p> <ul style="list-style-type: none"> ONLY the following special characters are allowed: hyphen, at symbol, period, and underscore. (- @ . _) Leading and trailing spaces are permitted. Verify that you have not entered one in error.
Password / Retype Password	<p>Enter the password for logging in to Travel.</p> <p>This is the field to use if you want to reset a password as well.</p> <p>If you reset a password to the user's Login name, the system will automatically prompt the user to change it the next time he/she logs in to Travel.</p>
Title, First Name, Middle Name, Last Name, Suffix	<p>Enter or select as appropriate.</p> <p>IMPORTANT! The user's name should always be the name that appears on his/her identification for travel purposes.</p>

Scroll down to the next section.

The screenshot shows a web form for user profile management. At the top, there are two input fields: "GDS Profile Name" and "XML Profile Sync ID". Below these are three more input fields: "Employee ID", "Account Activation Date" (pre-filled with "12/18/2017"), and "Account Termination Date". A section titled "Permissions" contains five unchecked checkboxes: "Guest booking", "Report user", "Admin Permission", "TripLink Travel Policy Admin", and "Data Retention Administrator". At the bottom of the form are two buttons: "Save" and "Cancel".

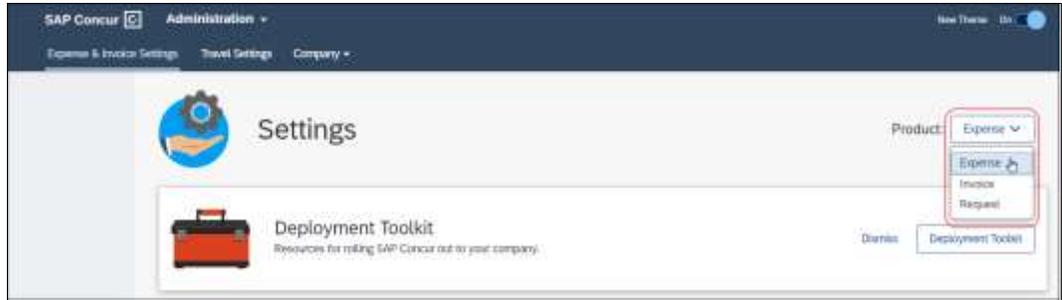
Field	Description/Action
GDS Profile Name	Provided by the TMC
XML Profile Sync ID	Either: <ul style="list-style-type: none"> If the field is already populated, make no changes; the field has been configured to provide either the Login ID or the Employee ID. If the field is blank, enter the identifier as defined by your company or TMC.
Organization Unit	Select the desired organization unit.
Employee ID	Enter the employee ID
Account Activation Date	Concur automatically assigns the date the user record was created.
Account Termination Date	Enter (or select using the calendar) the date the user will stop using Travel. Once a user is de-activated, they no longer can access Concur Travel. If someone is leaving the company or will no longer be traveling, set this date to the last date the person will use Travel. You can set this to a date in the past to deactivate someone immediately.
<custom profile fields>	Add values here if applicable as directed by your company.
Permissions	Select the check boxes that apply: <ul style="list-style-type: none"> Guest booking: Allows user to make bookings for non-profiled travelers, such as recruits Report user: Grants access to reports Admin Permission: Grants access to the setup wizard TripLink Travel Policy Admin: Grants access to TripLink (This check box appears only if this feature is enabled for this company.)  For more information, refer to the <i>TripLink User Guide</i>. Data Retention Administrator: Not yet available; do not use

4. Click **Save**.

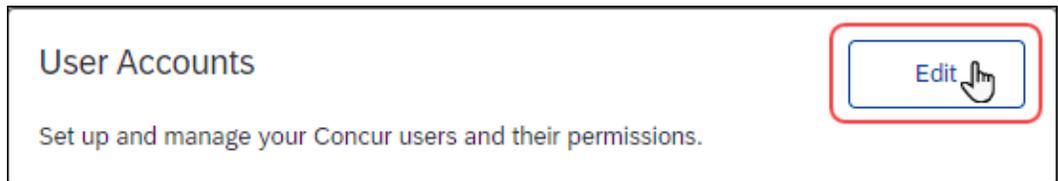
Manually Add a New User – Travel WITH Expense

▶ ***To add a new user:***

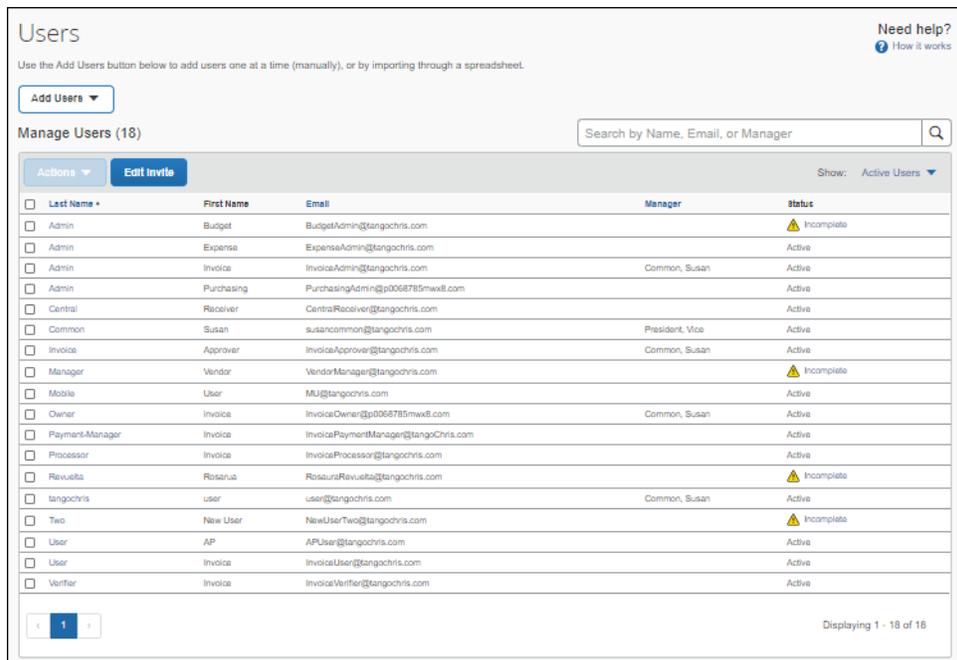
1. Click **Administration > Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list click *Expense*.



3. In the **Access To Concur** section, on the **User Accounts** tab, click **Edit**.



The **Users** page appears.



On the **Users** page, click **Create New User** to add a new user.



The **Create User** page appears.

Expense & Invoice Settings > Users > Create

Create User

Need help? [How it works](#)

This is where you add users, search for existing users, and update user information. Click 'Create New User' to add a user. If you have a large number of users, consider using 'Import Users' instead.

[Save](#) [Cancel](#)

Automatically send invite email on save

User Information

Login (email address) * Password * Retype Password *

First Name * Last Name * Middle Name Employee ID *

Email

Country/Region Of Residence * State/Province Locale * Active

Exempt from Expense Type Limit rules?

Employee Administration Country/Region * Reimbursement Currency * Reimbursement Method *

Expense Manager Request Manager Invoice Approver

No Default Manager No Default Manager No Default Manager

User Permissions - check all that apply

Cognos Reporting Access

No Reporting Access

Expense

- Can Administer (includes Request)
- Can Process Expense Reports (includes Requests)
- Can Submit Expense Reports
- Can Approve Expense Reports
- Can Administer Cash Advance

Request

- Can Submit Requests
- Can Approve Requests

Invoice

- Is Invoice Admin?
- Is Invoice AP User?
- Is Invoice Owner?
- Is Invoice Approver?
- Is Purchasing Admin?
- Is Invoice Vendor Manager?
- Is Invoice Processor?
- Is Invoice Payment Manager?

4. For the **Expense**-related fields, refer to the *Shared: Users Setup Guide for Concur Standard Edition*.

Expense

- Can Administer (includes Request)
- Can Process Expense Reports (includes Requests)
- Can Submit Expense Reports
- Can Approve Expense Reports
- Can Administer Cash Advance

5. For the **Travel**-related fields, make the appropriate choices as described in the following table.

The screenshot shows a user setup form with the following sections:

- Organization Unit:** A dropdown menu with "Travel policy" selected and "Travel Policy (US) N" visible below it.
- Reimbursement Method:** A dropdown menu with "-Please Select-" selected.
- User Permissions:** A section with the instruction "Check all that apply". It includes a "Cognos Reporting Access" dropdown set to "Select One ...".
- Expense:** A section with four checkboxes: "Travel and Expense Administrator" (checked), "Can Process Expense Reports" (checked), "Can Submit Expense Reports" (checked), and "Can Approve Expense Reports" (checked).
- Travel:** A section with three checkboxes: "Travel Only Administrator" (unchecked), "Guest booking" (unchecked), and "Report user" (unchecked).
- Additional configurations:** A section with four input fields: "Account Activation Date" (04/07/2015), "Account Termination Date" (empty), "GOS Profile Name" (empty), and "XML Profile Sync ID" (empty).

Field	Description/Action
Travel Policy	Select the travel policy that will apply to the user.
Travel (permissions) section	
Travel Only Administrator	Select to allow access to the setup wizard where the user can modify user information but cannot add a new user.
Guest booking	Select to allow the user to make bookings for non-profiled travelers, such as recruits.
Report user	Select to allow access to reports.
Additional configurations	
Account Activation Date	Concur automatically assigns the date the user record was created.
Account Termination Date	Enter (or select using the calendar) the date the user will stop using Travel. Once a user is de-activated, they no longer can access Concur Travel. If someone is leaving the company or will no longer be traveling, set this date to the last date the person will use Travel. You can set this to a date in the past to deactivate someone immediately.
GDS Profile Name	Provided by the TMC

Field	Description/Action
XML Profile Sync ID	<p>Either:</p> <ul style="list-style-type: none"> If the field is already populated, make no changes; the field has been configured to provide either the Login ID or the Employee ID. If the field is blank, enter the identifier as defined by your company or TMC.

- Click **Save**.

Locate an Existing User – Travel *WITH* or *WITHOUT* Expense

► To locate an existing user:

- In the left-side menu, click **Manage Users**.

The screenshot shows the 'MANAGE USERS' interface. On the left, a navigation menu lists various settings, with 'Manage Users' highlighted. The main area contains a search bar with the text 'Admin User' and a search icon. Below the search bar is a '+ New User' button. A table displays a list of users with columns for 'Last Name / First Name', 'Email Address', 'Active', and 'Profile Access'. One user is listed: 'Chander, Chris' with email 'cc@ajSept15.com' and 'Active' status.

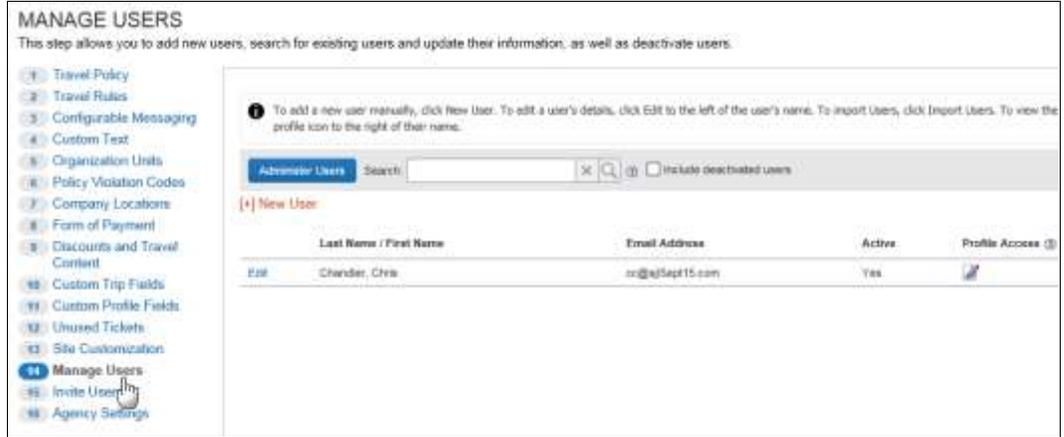
NOTE: The sample shows Travel *without* Expense. If implemented with Expense, the **New User** button is not available.

- Use the **Search** field to type in a name or any part of a name. Entries in this field are not case-sensitive. Check the box to include inactive users if you want to search all profiles. Leaving this unchecked will limit the search to active profiles.
- In the results list, click the name of the user (link) that you want to review.

Edit User Information – Travel *WITH* or *WITHOUT* Expense

▶ To edit an existing user's information:

1. In the left-side menu, click **Manage Users**.



NOTE: The sample shows Travel *without* Expense. If implemented with Expense, the **New User** button is not available.

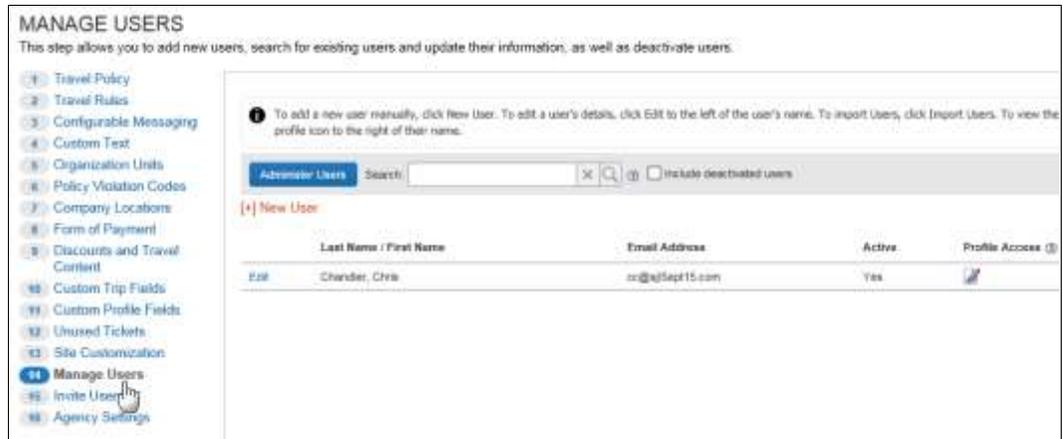
2. Click **Edit** for the desired user. The **User Detail** window appears.
3. Make the desired changes as defined in *Adding a New User* in this guide.

NOTE: Depending on your permissions, you may not be able to edit all fields. Go to the **Users** page in Product Settings to see if you can edit those fields.

Delete Users – Travel **WITH** or **WITHOUT** Expense

▶ To delete an existing user:

1. In the left-side menu, click **Manage Users**.



NOTE: The sample shows Travel **without** Expense. If implemented with Expense, the **New User** button is not available.

2. Locate the desired user, using the **Search** field (as described above), if necessary.
3. Click **Edit** for the desired user. The **User Detail** window appears.
4. Enter a date in the **Account Termination Date** field. Enter the date the user will stop using Travel. Once a user is de-activated, the user will no longer have access to Concur Travel. You can set this to a date in the past to deactivate a user immediately.
5. Click **Save**. Concur Travel will also delete the GDS profile 24 hours later so the TMC knows that user has been de-activated. De-activated profiles remain in the Concur Travel database until the site is deleted.

Import Users – Travel **WITH** Expense

If you are implementing Travel **with** Expense:

- Add users via import using the **Users** step in Expense setup.

 Refer to the *Shared: Users Setup Guide for Concur Standard Edition*.

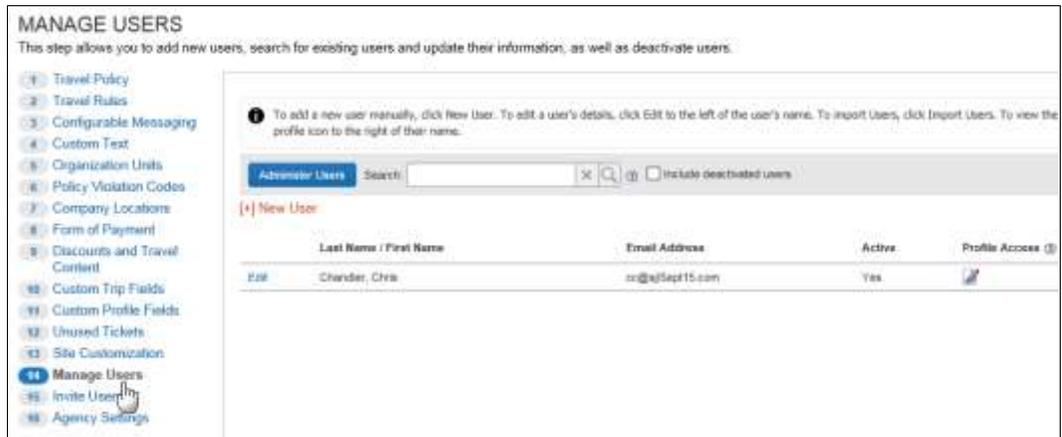
- Modify user information via import using the **Manage Users** step in the Travel Setup Wizard.

Import Users – Travel *WITHOUT* Expense

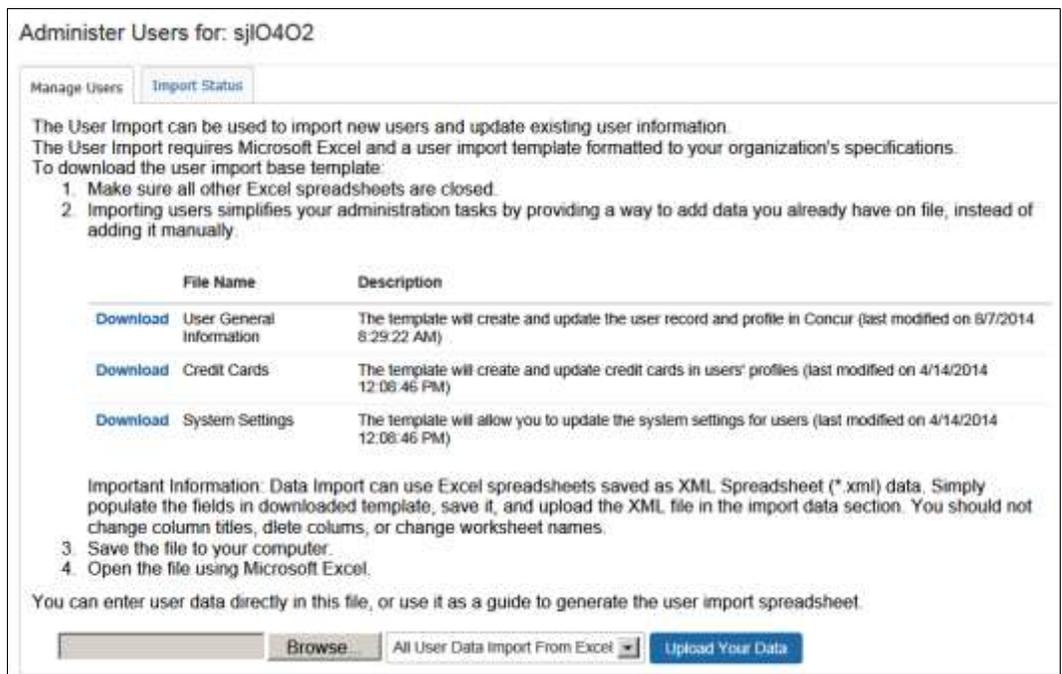
If you are implementing Travel *without* Expense, you can import new users and modify existing user information via import in the Travel Setup Wizard.

► To import users:

1. In the left-side menu, click **Manage Users**.



2. Click **Administer Users**. The **Administer Users** window appears.



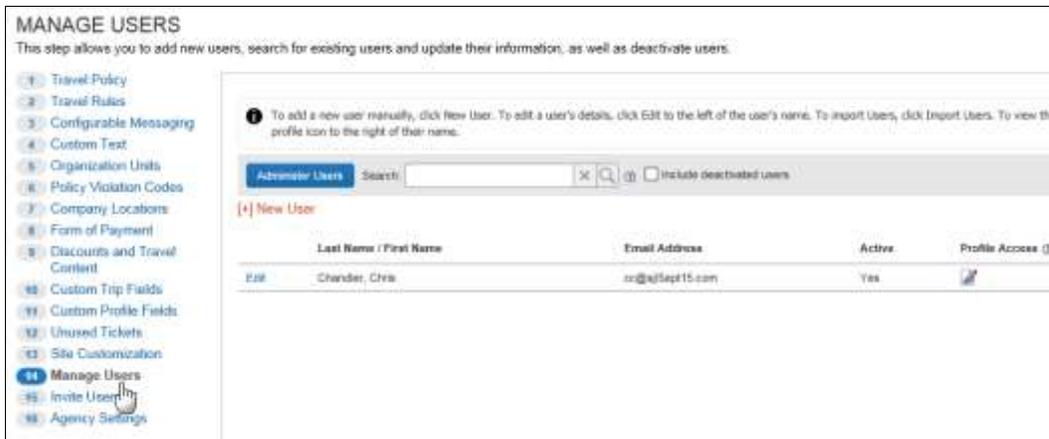
3. Click the **Manage Users** tab, if not already selected.
4. Click the **Download** link to the left of the desired file.
5. Update the file and save to your computer.

6. Click **Browse/Choose File** (depending on the browser) to locate the updated file on your computer.
7. Once added, click the **Upload Your Data** button.

View Import Status – Travel WITH or WITHOUT Expense

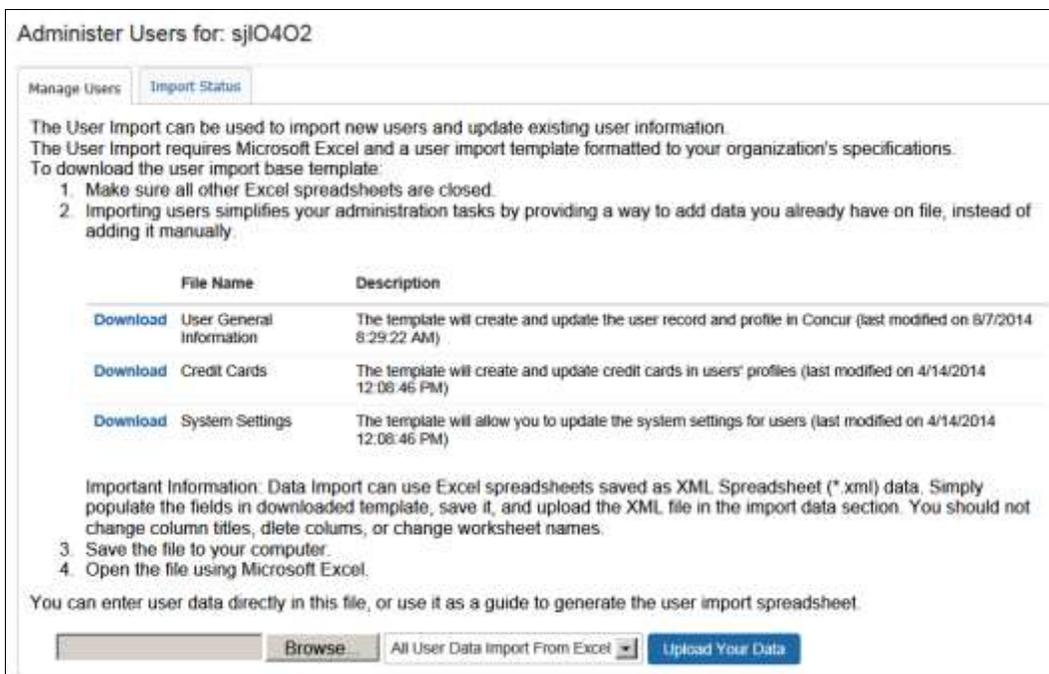
► **To view the import status:**

1. In the left-side menu, click **Manage Users**.



NOTE: The sample shows Travel *without* Expense. If implemented with Expense, the **New User** button is not available.

2. Click **Administer Users**. The **Administer Users** window appears.

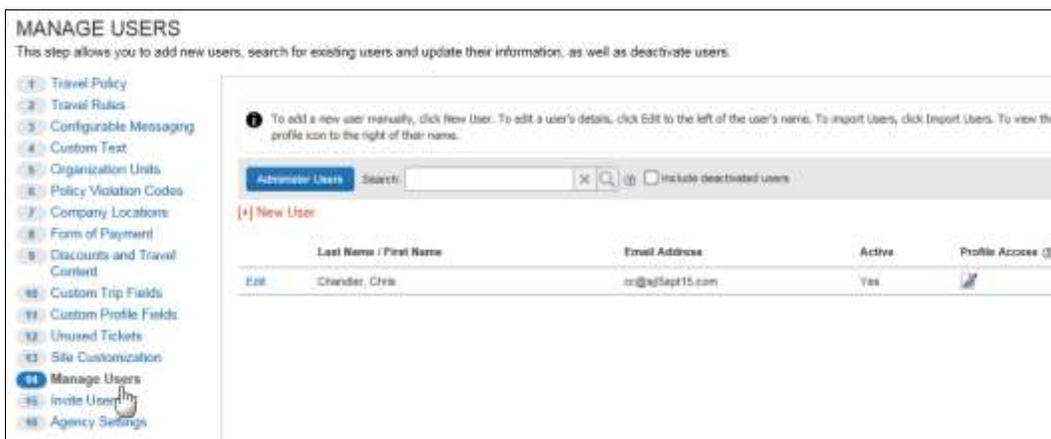


3. Click the **Import Status** tab to view the status of the last 10 imports.
4. To see the details on the particular import, click the icon in the **Details** column.
 - ◆ Details will show below with time/date stamps.
 - ◆ A link will also be provided to download the original import file, with a new column at the end labeled **Errors**.
 - ◆ The administrator will be able to see what the issue was and make corrections. They can then perform an additional import to apply the changes.

Access User Profiles – Travel *WITH* or *WITHOUT* Expense

▶ To access user profiles:

1. In the left-side menu, click **Manage Users**.



NOTE: The sample shows Travel *without* Expense. If implemented with Expense, the **New User** button is not available.

2. Click the icon in the **Profile Access** column. The profile page appears.

Traveler Personal Profile - Personal Information

Jump To: Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **Required** must be completed to save your profile.

Important Note
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.

Title **Required** First Name **Required** Middle Name Nickname Last Name **Required** Suffix

No Middle Name

3. Make the desired changes.

4. When you click **Save** in Profile, this will push all changes to the GDS or the third-party profile sync tool (if applicable).

When you view the profile, this will pull data from the GDS or the third-party profile sync tool (if applicable). This portion will occur **only** if bi-directional sync has been enabled in the travel configuration.

Step 15 – Invite Users

Overview

The **Invite Users** step appears only if Travel is implemented without Expense.

Use the **Invite Users** step to perform the final actions to launch your new travel site. You can add a custom message to the email that all your users will receive when you launch the site. This email contains a link that allows users to log in and set up a secure password.

Invite Users does the following:

- Allows you to add a personal message to the welcome email
- Alerts your entire organization that Concur is now ready to accept travel bookings and sends a welcome email to all users
- Provides employees with a link to access the site and begin booking travel

Invite Users

► **To invite users:**

1. In the left-side menu, click **Invite Users**.

INVITE USERS
This step allows you to configure a welcome message that will be sent to all new users added to the site. It will include a link for the new user to log in for the first time.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users**
- 16 Agency Settings

i To generate an email to all users, click Send Email. Click Save to save text changes only. Check the box if you want to automatically send.

Email Subject: Welcome to Concur

Email Text:

Your company has created a Concur account for you! Concur is an online travel management solution that's easy to use. Now all of your travel can be booked in just a few clicks and with less hassle.

You can use Concur to manage your travel both on the Web and on your mobile device. Concur's mobile app is available at no cost to you so you can access Concur anytime, anywhere. Visit the appropriate app store to download the mobile app:

- iPhone®/iPad® - see more on iTunes or search for Concur on the App Store directly from your device
- BlackBerry®
- Android™ - search for Concur at the Android Market

Best Regards,

Path: p

Automatically send invite email for any new users.

Cancel Save Send

2. Enter your custom text in the **Email Text** field. This text will be displayed at the beginning of the welcome email, followed by the standard text.
3. Select **Automatically send invite email for any new users** if you want any newly added users (added either manually or via upload) to automatically receive this email.
4. Then, click:
 - ◆ **Cancel:** All changes in the HTML editor are ignored.
 - ◆ **Save:** Changes will be saved but no email is sent, unless the check box to automatically send for new users is checked. If that is the case, then the new version will be used in those scenarios.
 - ◆ **Send:** Email will be sent to all existing users.

Step 15/16 – Agency Settings

Overview

Use the **Agency Settings** step to manage:

- General agency settings, such as trip-on-hold, multiple booking sources, companions, etc.
- Transportation Security Administration (TSA) settings
- Agency invoice options

NOTE: The step number will differ depending on whether you are configuring Travel-only or Travel with Expense.

Work with General Settings

► To change settings:

1. In the left-side menu, click **Agency Settings**.

AGENCY SETTINGS

This step allows your fulfillment travel agency to configure items specific to their operational process.

- 1 Travel Policy
- 2 Travel Rules
- 3 Configurable Messaging
- 4 Custom Text
- 5 Organization Units
- 6 Policy Violation Codes
- 7 Company Locations
- 8 Form of Payment
- 9 Discounts and Travel Content
- 10 Custom Trip Fields
- 11 Custom Profile Fields
- 12 Unused Tickets
- 13 Site Customization
- 14 Manage Users
- 15 Invite Users
- 16 Agency Settings

⚠ Please consult with your fulfillment travel agency to populate these fields.

Please select a configuration:

sjlSept15 (US) ▼

Enable multiple booking sources capability ⓘ Maximum Companions

Use passive approval for offline approval requests ⓘ

Allow users to put trips on hold

Show the Comments to Agent text box

Number of days to hold trip:

No limit ▼

Transportation Security Administration (TSA) Secure Flight Options

For information required by the TSA for travel to, from, connecting in and flying over the USA:

Show applicable fields on profile, but don't require; prompt and require if missing, and give the option to save ▼

When to send TSA-required data to air carriers

Only for travel to, from, connecting in and flying over the USA ▼

Agency Invoice ⓘ

Use agency invoice for GDS Air ⓘ

Use agency invoice for SNCF ⓘ

[Save](#)

2. Select the desired configuration.
3. Make the desired selections:

Option	Description/Action
<p>Enable multiple booking sources capability</p>	<p>Select this check box to allow users to combine GDS in the same PNR with: Air Canada, Southwest, Travelfusion (web fares), Cleartrip, and Amtrak.</p> <p>NOTE: You cannot enable Agency Invoice and Enable multiple booking sources capability. If you attempt to save with both, multiple booking sources will be disabled.</p>

Option	Description/Action
Maximum Companions	<p>Select the number of companions that will be allowed in the same trip, treated as a group, in one reservation (PNR).</p> <p>If you select a number greater than zero, the Number of adults list appears in the Travel Wizard so the user can select the number of traveling companions.</p> <p>IMPORTANT: This feature should be enabled <i>only</i> by the fulfillment travel agency or with their permission. There may be challenges with supporting this feature from a TMC perspective.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • If there are schedule changes, then the airline will do its best to keep the travelers together. • The airline will do its best when one person uses his/her status to upgrade another, for some airlines. • If one of the users has to change his/her trip, the reservation must be "split" before the change can be made. • Some fulfillment travel agencies do not support companion travel due to the operational challenges with changes. • This setting will not appear if the travel configuration is associated with Amadeus.
Use passive approval for offline approval requests	<p>This feature should only be enabled by the fulfillment TMC. The agency must populate the offline approval queue for this to work via the Agency configuration.</p>
Allow users to put trips on hold	<p>Select this check box to allow travelers to hold a trip on the Trip Booking Information page, which is the point where they would normally purchase the trip.</p> <p>This option reserves the fare and any other options; however, it does not send the flight for ticketing until the traveler chooses to purchase the fare in Travel. It is important to make sure that travelers are aware of rules and limitations for holding fares.</p>
Show the Comment to Agent text box	<p>Select to allow the Comments to Agent field that appears on the Trip Details page.</p> <p>NOTE: This causes a reservation to fall out of automation and be looked at by an agent. This typically incurs a "touch fee" and becomes a more costly PNR for fulfillment.</p>
Number of days to hold trip	<p>Select the number of days a user can place a trip on hold.</p>

4. Click **Save**.

Work with TSA Settings

 For complete details, screen captures, and setup steps, refer to the *Transportation Security Administration (TSA) Requirements Travel Service Guide*.

Work with Agency Invoice Settings

Some customers and TMCs have an agreement that monthly billing will be used for air tickets via the GDS. In this case, Concur does not ask the user for a credit card and writes the form of payment to the PNR as invoice. The agency issues the ticket and then provides a bill to the customer.

NOTE: You cannot enable Agency Invoice and **Enable multiple booking sources capability**. If you attempt to save with both, multiple booking sources will be disabled.

 For information about different forms of payment, how they may affect each other, and configuration points to watch, refer to the *Form of Payment Travel Service Guide*.

Section 5: Travel Reporting

Overview

Use the **Reporting** tab (main menu) to run travel reports.

 For a complete list (and description) of the reports, refer to the *Travel Reporting User Guide*.

Run a Travel Report

▶ To run a report:

1. In the main menu, click **Reporting** > **Travel Reports**. This page appears.



2. Click any report listed on the left side.
3. Each report will have different options such as whether to display on screen or export to Excel.

Section 6: Travel System Admin

Overview

The concept of administration changes with Concur Standard. Many options are now part of the setup wizard. Travel configurations will remain but will have limited options. These options are now limited to travel-agency-specific features.

Agency Information

Agency Booking Config: All About Travel (Sabre Multi-GDS - TGHC)

BAR (Accounting Name) Accounting Code (LEAVE BLANK FOR WORLDSPAN)

Profile Template File: (None)

Agency Ticketing Country / Currency: United States of America (\$)

Wizard Options

Allow post-ticketing flight changes: Do not allow

Air Search Options

Use Bargain Finder Max Search

Max Search Results: 200

Worldspan

Air Search Options

Use Premium Search

Exclude Unbundled Economy Fares

E-Receipts

E-Receipts Enabled

Accept Itinerary Air Ticket as Air E-Receipt

Hotel Connectors

Amex Direct

DK Number: Subscriber ID:

System Options

- NON-AMADEUS: Add title to user's first name for manual PNR build
- AMADEUS: Remove cabin restrictions on low fare shops
- SABRE ONLY: Deeper Southwest shop (extra scans)
- APOLLO ONLY: Los Angeles searches default to LAX
- APOLLO ONLY: New York searches default to LGA
- WORLDSPAN ONLY: shop Airtran on alternate GDS if no direct connect
- APOLLO/GALILEO/SABRE/Branded Fares/WORLDSPAN ONLY: Double scans to force nonstop search
- APOLLO/GALILEO AIR CANADA ONLY: Suppress Tango fares
- SABRE ONLY: Never use legacy pricing platform
- AIR CANADA ONLY: Search GDS and Direct Connect
- SABRE ONLY: Skip tax scan in flex-faring
- Leave unused FQTV numbers from profile in PNR
- APOLLO/GALILEO ONLY: Southwest COA filed and active on this PCC
- APOLLO/GALILEO ONLY: Search for flights using the requested airports only
- APOLLO/GALILEO ONLY: Show total fare including taxes for flex-faring

Amadeus only:

AMADEUS ONLY: Enable all features using Amadeus web services
(AMADEUS WEB SERVICE Credentials are Required to Enable this feature and are available through Amadeus)

Pricing Options

Pricing Options
None defined for this GDS.

Worldspan Only: Default Air Ticketing Line Format
TAW /14 /Friday

Access To Agency Fares
Passenger Type Code Modifier

GDS PNR Options

Create a GDS PNR for every trip booked on-line through Concur

Write passive segments for non-GDS content if I have not specified a default for the specific vendor in the table below

Defaults For Specific Non-GDS Vendors

Addison Lee (Ground service) Use the default specified above

AddisonLee Use the default specified above

AerLingus Use the default specified above

Profile Options

GDS/Profile Synchronization

Select a default value for XML Sync ID: None Use TravelScreen with profiles (Apollo and Galileo only)

Save profiles to GDS
if checked, Concur will save the user's profile to the GDS when user's Concur profile is saved.

Sync profiles from GDS
if checked, Concur will read the user's profile from the GDS and synchronize it into our database when the user views his or her profile.

Sync profiles before air searches
if checked, Concur will synchronize the user's profile from the GDS prior to performing any air searches.

NOTES:
(1) If you turn these on, it is very important that you select the correct Profile Template File for this agency/customer. If you don't, you risk writing their profiles in the wrong format and possibly losing data.
(2) You must have a BAPI set up that causes a profile to move. The profiles are saved in the pseudo-bar that is identified with a * or ^.

TripSource:ProfileManager

Login Password Parent Entity Id User ID Prefix Disable GDS Profile Sync

Template Id Target URL
EMEA Commercial

Tramada

TramadaAgency TramadaCompany TramadaAuth TramadaClassic

XML Sync Authorization - used for syncing travel profiles via web service; leave blank to disable
PersonCode and PersonDBC should contain the name of the custom fields that should map to those fields in the XML sync.

Company Code Login Type: None - Cannot add new users

User Login Suffix/Validation

Password Password Type

PersonCode (Custom Field) Password Prefix/Value

PersonDBC (Custom Field)

ClientQuestions (Custom Fields List)

Sync to GDS Sync Option* (Clear to disable automatic sync to GDS)

Send New Users on Changes Retrieve

Limit Sync to Profiles for This Config

Automatically Populate Profile Last Updated Date (recommended for customers who have the Concur travel profile hidden)

Use work/home address as default for credit cards

PNR Finishing Configuration
Finishing Configuration file

(Note)

Form of Payment Options

Agency Processing Fee Form of Payment for Land Only/Non-GDS Reservations Always write user selected card (default)

Credit Card for Air/Rail Required in Profile

Other Information

Host string (for login branding - 50 character limit)

Complet Integration

Complet Enabled Complet GDS PCC: Complet Agency ID:

Travel System Admin

▶ **To access/update travel system admin:**

1. In the Professional edition of Concur Travel, click **Administration > Travel > Travel System Admin**. Locate the Concur Standard Travel configuration.
2. Click the site or configuration link you wish to update.
3. You will now see TMC-specific items that should be updated for any Standard implementation. **Only TMCs will have access to this page.**

 Refer to the *Concur Travel: Travel System Admin User Guide* (for Professional/Premium Travel) for information about the fields on this page. Not all fields that are available in Professional/Premium are available in Standard. However, if the field is available in Standard, the definition provided in the Professional/Premium documentation applies.

4. Click **Save**.

Default Travel System Admin Settings

The options in this table have been hidden, set to the default shown below, and **cannot be changed**.

Travel Configuration Setting	Default Value
Billing Tier	No longer needed
Sabre Profiles Template ID Sabre Profiles Name Field Remark Sabre Profiles Name Format	These fields appear only if Sabre Profiles has been activated. If they appear, they are blank by default.  For complete details, refer to the <i>Sabre Profiles Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.

Travel Configuration Setting	Default Value
Hotel Override IATA	Blank
Car Override IATA	Blank
Air Connectors	
Air Connectors	 Refer to <i>Discounts and Travel Content</i> in this guide for configuration information. If there are default settings, they are listed there.
Wizard Options	
Augment price results...	Automatically
Notify Traveler if non-stop flights are outside the time window	Auto-on
Enforce LLF based on	Search window
Number of LLF definitions per rule class	1
Constrain rule violation fare list to LLF window	Off
Mark LLF Fare/s with icon	On
Find closest LLF flight and capture details	Off
No Personal Trips	On
Allow Auto Cancel of air/rail trips that are rejected	On
Allow Immediate Cancel of non-air/rail trips that are rejected	On
Allow Multiple Violation Reason Codes	Off
Allow Auto Cancel of Trips on Hold	On
Allow Auto Cancel of trips that require approval	On
Auto-approve trips on passive hold...	On with a maximum of 1 day
Allow pre-ticketing flight changes	On when trip is on hold
Allow ticket voids	On  For complete details, refer to the <i>Trip Cancel and Voids Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Enable Churn Detection	On for all vendors
Enable Duplicate Detection	Auto-on for Delta only
Visa Requirements Reminder	Off

Travel Configuration Setting	Default Value
Show Flight Finder	On
Automatically assign seats on airlines that charge for it	Off
Show IATA Travel Centre Links	On
Show "Add Air" on Existing Itineraries	On
Hide Fee Display on Itineraries and Email	On
Hotel check-in date prompt...	6:00 AM
Show Morning, Afternoon, Evening, and Anytime as flight time options	On NOTE: The <i>Anytime</i> option appears to users only if Bargain Finder Max is enabled and if the Max Search Results field is set to <i>200</i> . (Bargain Finder Max is set in Travel System Admin.)
Default Departure Hour	9:00 AM
Default Return Time Hour	3:00 PM
Allow travelers to edit Frequent Flier programs	On
Allow Upgrade Requests for Non-Ticketed Itineraries	Off
Mixed carriers split ticketing	From Schedule and Price Search
Enable Request Integration	Off
Enable Request Booking Switch	Off
... user confirmation of hotel rate policy	Required
Allow Airline FF number association for Car/Hotel	On
Disable auto-lookup for Company Location selection	Off
Enable vendor segment fees	Off
TSA Settings	
Allow guest bookings when the Date of Birth is unknown	On (Date of Birth Unknown check box appears)
Write middle name to Itinerary	On

Travel Configuration Setting	Default Value
Carbon Models Options for AIR	
Carbon Models	On - set to DEFRA  For complete details, screen captures, and setup steps, refer to the <i>Green Support Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Class of Service Options	
When the traveler is authorized...	Default to lowest class of service
Rule Class Options	
Rule Class Selection	User cannot select rule class
Air rules use base fare instead of total fare	
Air Search Options	
Access to Guaranteed Ticketing Carriers	Allow Unless Manager Approval is Required
AF Abonnement	Auto-on for French Configurations
Air Bookings via Concur Mobile Enabled	On
Hide Multiseg Air/Rail Search Option	Off
Hide Propeller Planes Filter	Off
Run extra search on hub when an associated airport is selected	Off
Enable "View More Air Fares" Option	On  For complete details, screen captures, and setup steps, refer to the <i>View More Air Fares Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Allow user to specify airline for deeper search	On
Auto-check all Airport Filters in Flight Search	Off
Highlight Fly America Act Compliant Options	Off  For complete details, screen captures, and setup steps, refer to the <i>Government Features Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Show no car/hotel alert	On

Travel Configuration Setting	Default Value
Flex Faring	
Flex Faring	Auto-on  For complete details, screen captures, and setup steps, refer to the <i>Flex-Faring Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Hotel Search Options	
Default search radius	5
Search radius for corporate hotels	30
Number of hotel results to shop	10 NOTE: Concur displays a default of 25 hotel search results on the hotel search results page. Note that there is a difference between <i>hotel search results</i> and priced hotel search results . The number of priced hotel search results that return are reflected in this field. For example, if a customer has the value 10 set to hotel shops (in this field), then the hotel search results will show 25 total, 10 of which will have prices fetched for them.
Company Location Search Radius	70
Display per diem rates with individual hotel selections	Off
Hide these profile preferences and search options	Off
Hilton DC	Off
Hotel Connectors	
Hotel Connectors	 Refer to <i>Discounts and Travel Content</i> in this guide for configuration information. If there are default settings, they are listed there.
Availability Results Sorting	
Shop by Fares Default	Company Policy
Shop by Schedule and Flex Faring Default	For Australia configurations: Fewest Stops For Canada configurations: Earliest Departure  Refer to the <i>Flex-Faring Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Hotel Sort Default	Company Policy

Travel Configuration Setting	Default Value
Rail Connectors	
Rail Connectors	 Refer to <i>Discounts and Travel Content</i> in this guide for configuration information. If there are default settings, they are listed there.
Ground Reservation Options	
GGA Limos/Ground Connectors	 Refer to <i>Discounts and Travel Content</i> in this guide for configuration information. If there are default settings, they are listed there.
Parking	
Park 'N Fly	On  For complete details, screen captures, and setup steps, refer to the <i>Park 'N Fly Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
American Airlines AirPass Options (formerly AAirpass)	
AirPass	Off  For complete details, screen captures, and setup steps, refer to the <i>American Airlines AAirpass Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Car Search Options	
Allow Automatic Reservations of...	Cars that are in policy
Allowable Car Types	All
Default Car Type	Intermediate
Default Car Transmission	Automatic for US, Canada and Australia. Manual for UK, France and Germany
Hide Ski Rack option on Profile and in searches	Off
Always run a general shop request for car searched	Off
Require credit card for car reservation	Off
Don't send card information to Hertz	Off
Allow Car Promos	Applies to Sabre only: On
Allow delivery and collection...	Off

Travel Configuration Setting	Default Value
Car Connectors	
Car Connectors	 Refer to <i>Discounts and Travel Content</i> in this guide for configuration information. If there are default settings, they are listed there.
AirPlus DBI	
AirPlus	Off - AirPlus is not available at this time
Trip Sharing and Cloning	
Trip Sharing and Cloning	On  For complete details, screen captures, and setup steps, refer to the <i>Clone/ Share Trip Travel Service Guide</i> – to locate, see <i>Find the Travel Service Guides & Fact Sheets</i> in the appendix of this guide.
Manifest Clone Options	
<All options>	Off
DC Configuration	
Finishing	Notify Customer with default text for Amtrak and Southwest
System Options	
Maximum air contracts/prefs to combine in a search	2
GDS PNR Options	
Write passive segments for user supplied hotel	Off
Email Options	
Confirmation Emails	Send
Ticketing Emails	Off
Travel Reservation Email Subject	Concur Itinerary: {DEPDAY}: {RECORDLOCATOR}
Reminder Emails	Off
Email Hotel/Map Directions	Off
Cancellation Email	On
Cancellation Email Subject	Trip Cancelled: {RECLOC}
Fares Revalidation	
<All options>	Off

Travel Configuration Setting	Default Value
Approval Email Options	
<All options>	On
Orphan Trip Email	
<All options>	On with default message and subject line
Profile Options	
Send users an email whenever their profile is updated	Off
Suppress emails sent when travel assistant changes are made	Off
Profile Shows Company Locations	Off
Profile Passport Information	Warn if Incomplete
When a user's GDS profile is changed by Concur, email change list to:	Off
When a user's GDS profile is changed by Concur, email change list to:	Off
Refuse Self Assigning assistants...	Off
Custom Attributes	
<All options>	 Refer to <i>Custom Trip Fields</i> and <i>Custom Profile Fields</i> in this guide for configuration information. If there are default settings, they are listed there.
Invoicing	
Invoicing	Send invoice directly to company for Concur Fee
Form of Payment Options	
Use agency invoice for government-only airfare	Off
Government Only Airfare Ghost Card...	Off
User Custom Property for Default Credit Card	Off
Allow temporary credit cards for guest bookings	On
Enforce BIN Restrictions on temporary Card	Off – we don't support BIN restrictions
Temporary Cards for hotel only	Off
Force users to Choose a credit card	Off
Project Billing	
<All options>	Off

Travel Configuration Setting	Default Value
PNR Finishing Configuration	
E-tickets	Auto-on
Enable Sabre Web Services...	Auto-on
Force Finishing Before Approval	Off
Preauthorization	Off
Other Information	
Name Remark	Blank
Wizard Mode	Defaults to <i>Galileo Prod</i> for any configurations that use the Galileo GDS
Travel Help URL	Default
Travel Tools URL	Default
Manager Approver Label	Default of "manager"
Alternate Login Text	Off
Refundable Check Box	Show
Non-Refundable Ticket Alert	Default Text
Implementation Notes	Hidden

Section 7: Additional Configuration Information

Gogo Inflight Wi-Fi

Gogo Inflight Wi-Fi is automatically ON for Standard Travel.

 Refer to the *Gogo Inflight Wi-Fi Travel Service Guide*.

Sabre Profiles

If a Standard travel configuration is associated to an Agency Configuration that has Sabre Profiles enabled, then the configuration steps are the same as for Professional Travel.

 Refer to the *Sabre Profiles Travel Service Guide*.

NOTE: The custom profile fields configured under Standard Travel setup step 10 (Custom Profile Fields step) display the **Send to Sabre Profiles** check box. The check box is selected (enabled) by default and it is not editable.

Dual Fare Display (Sabre Only)

This feature is ON by default. It can be disabled by contacting SAP Concur support for assistance with the associated module property.



Refer to the *Dual Fare Display (Sabre Only) Travel Service Guide*.

Concur Meeting/Third-Party Meeting

Neither Concur Meeting nor Third-Party Meeting are currently available in Standard.

Hotel Previous Stay History

The hotel search results show a "stay history" message for each hotel the traveler has previously booked. This feature is automatically ON for Standard Travel and is not available for change.



Refer to the *Hotel Previous Stay History Fact Sheet*.

Offline Approval Error Queue

This queue is available specifically for managing offline approval PNRs that Concur is unable to process. This allows TMCs to monitor a specific queue for these reservations to ensure they can be approved before the traveler's departure.

▶ **To set up the queue:**

1. Click **Administration > Travel > Travel System Admin**.
2. In the **Agency Setup** section of the left menu, click **View Travel Agencies**.
3. Locate the agency configuration for the site.
4. In the **Queue Sets** section, provide the Pseudo City/Office ID/Subscriber ID, Queue, and Category information under the new **Offline approval error queue** queue type and click **Submit**.

Queue Sets

Queue Set Name: Reporting Enabled Retrieve extra itineraries per queue reader run

Defined Queues (queue types in red required)

Queue Type	Queue To:	Pseudo City	Queue	Category/Prefatory
Ticketing		<input type="text" value="ABC1"/>	<input type="text" value="100"/>	<input type="text" value="11"/>
Approval hold		<input type="text" value="ABC1"/>	<input type="text" value="101"/>	<input type="text" value="11"/>
Cancel		<input type="text" value="ABC1"/>	<input type="text" value="102"/>	<input type="text" value="11"/>
In Process (Now Optional and SCAN Saver)		<input type="text" value="ABC1"/>	<input type="text" value="103"/>	<input type="text" value="11"/>
Testing		<input type="text"/>	<input type="text"/>	<input type="text"/>
Report Queue		<input type="text"/>	<input type="text"/>	<input type="text"/>
Report Error Queue		<input type="text"/>	<input type="text"/>	<input type="text"/>
User Trip Hold		<input type="text"/>	<input type="text"/>	<input type="text"/>
Invoicing (non air-ticket PNRs and changes)		<input type="text"/>	<input type="text"/>	<input type="text"/>
Meeting ticketing queue		<input type="text"/>	<input type="text"/>	<input type="text"/>
Offline approval queue		<input type="text"/>	<input type="text"/>	<input type="text"/>
Voided ticket queue (when Concur voids a ticket)		<input type="text"/>	<input type="text"/>	<input type="text"/>
Refund request queue (Agency assistance needed with refund)		<input type="text"/>	<input type="text"/>	<input type="text"/>
Ticket change request queue		<input type="text"/>	<input type="text"/>	<input type="text"/>
Passive Open Booking		<input type="text"/>	<input type="text"/>	<input type="text"/>
Offline approval Error queue		<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add Alternate Queue Set](#)

NOTES:

- The Offline approval error queue cannot be located in the Queue Sets table immediately after the existing Offline approval queue due to the order in which support for the various queues was implemented. Implementers should take care to note the location of this new queue to ensure it is not missed when setting up new customers.
- Standard Travel administrators may not have access to the Agency Configuration page. This will likely need to be discussed with and managed by the travel agency.

Section 8: Appendix A – Find the Travel Service Guides & Fact Sheets

Travel Service Guides are mentioned throughout this guide.

- If you have the proper permissions, you can access them using the Concur Support Portal.
- If you have any type of Travel "admin" permission, you can access them through online Help in Travel.

Click **Help** > **Travel Administration Help**. Then, click the **Travel Service Guides & Fact Sheets** link.

The screenshot shows the Concur user interface. In the top right corner, there is a menu with options: 'Travel Help', 'Travel Administration Help', and 'Enable Business'. The 'Travel Administration Help' option is circled in red. A red arrow points from this option to a link labeled 'Travel Service Guides & Fact Sheets' in the main content area, which is also circled in red. Below this link is a table with two main sections: 'Setup Guides' and 'User Guides'. The 'Setup Guides' section has columns for 'Guide', 'Revised', and 'Format'. It lists a 'Travel' guide revised on 'Jun 22 2015' with the format 'DOC - PDF'. The 'User Guides' section has columns for 'Guide', 'Revised', and 'Format'. It lists a 'Travel Reporting' guide revised on 'December 23 2013' with the format 'DOC - PDF'. A footer at the bottom of the page contains a Microsoft announcement: 'Following Microsoft's announcement, Concur will be discontinuing support of IE 8 and 9 on February 11, 2016.'

NOTE: The **Travel Administration Help** menu option appears every time an admin accesses Help, including before **and** during setup.

Section 9: Appendix B – Password Defaults

 For complete information about this topic, refer to the *Password Management and Defaults Fact Sheet*.