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

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<tr><th>Date</th><th colspan="2">Notes / Comments / Changes</th></tr>
<tr><td>January 21, 2022</td><td colspan="2">Updated the copyright year; no other changes; cover date not updated</td></tr>
<tr><td>December 10, 2021</td><td colspan="2">Updated instructions for Product Settings page</td></tr>
<tr><td>August 30, 2021</td><td colspan="2">Removed references to CIBT (retired this date).</td></tr>
<tr><td>March 19, 2021</td><td colspan="2">Updated About this Guide and Setup Wizard sections</td></tr>
<tr><td>July 24, 2020</td><td colspan="2">Updated the procedure on pages 55-56 to reflect updates to the Users page UI.</td></tr>
<tr><td>April 27, 2020</td><td colspan="2">Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td></tr>
<tr><td>February 17, 2020</td><td colspan="2">Updated China terminology to Hong Kong, China</td></tr>
<tr><td>January 15, 2020</td><td colspan="2">Updated the copyright; no other changes; cover date not updated</td></tr>
<tr><td>May 23, 2019</td><td colspan="2">Added information about Dual Fare Display (Sabre Only)</td></tr>
<tr><td>May 13, 2019</td><td colspan="2">Minor edits; removed information on password hints</td></tr>
<tr><td>February 12, 2019</td><td colspan="2">Updated the copyright; no other changes; cover date not updated</td></tr>
<tr><td rowspan="3">May 29, 2018</td><td colspan="2">Updated to include the changes for May 2018 including:</td></tr>
<tr><td>Section</td><td>Description/Action</td></tr>
<tr><td>Site Customization</td><td>Removed setting for the privacy agreement</td></tr>
<tr><td>March 30, 2018</td><td colspan="2">Added notes about best practice of not allowing personal or sensitive data in custom fields</td></tr>
<tr><td>January 23, 2018</td><td colspan="2">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.</td></tr>
<tr><td rowspan="3">January 28, 2018</td><td colspan="2">Updated to include the changes for January 2018 including:</td></tr>
<tr><td>Section</td><td>Description/Action</td></tr>
<tr><td>Default Travel System Admin Settings</td><td>In the TSA Settings section, the Date of Birth Unknown check box automatically appears</td></tr>
<tr><td>January 28, 2018</td><td colspan="2">Changes not related to the release
Removed these sections; created new Travel Service Guides:
• Travel Admin – Travel Policy tab
• Travel Admin – Policy Violation Codes tab
Refer to the Approvals, Rules, and Classes/Policies Travel Service Guide.</td></tr>
<tr><td colspan="3">Older revision history has been removed.</td></tr>
</table>

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).

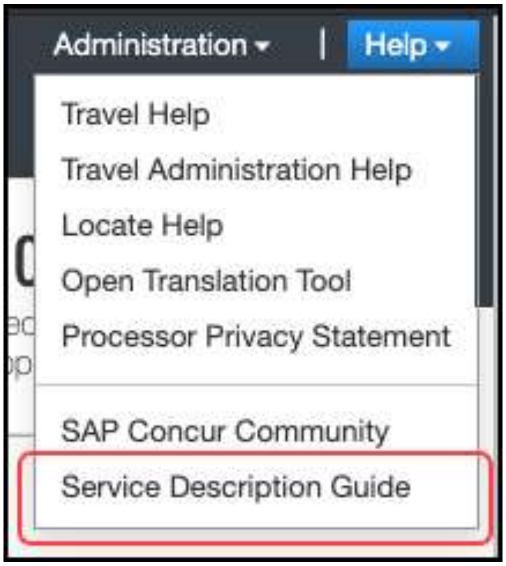
Refer to the *<name> Travel Service Guide*.

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**.

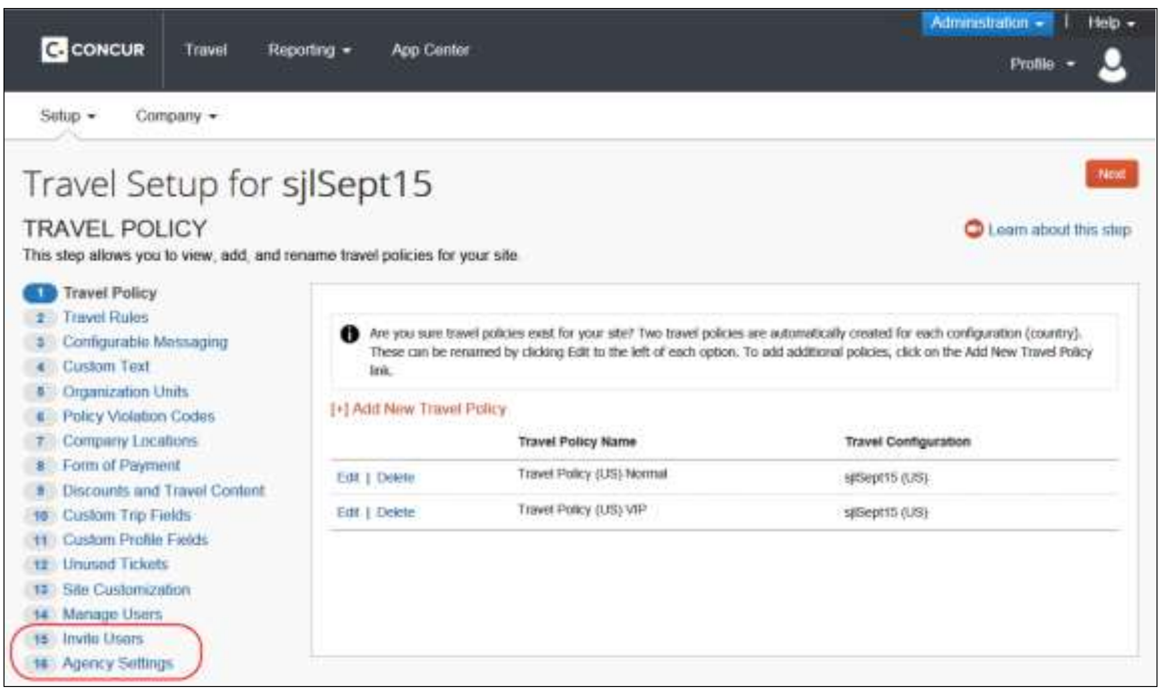
5. Click **Administration > Setup** at the top of any Travel page.

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).



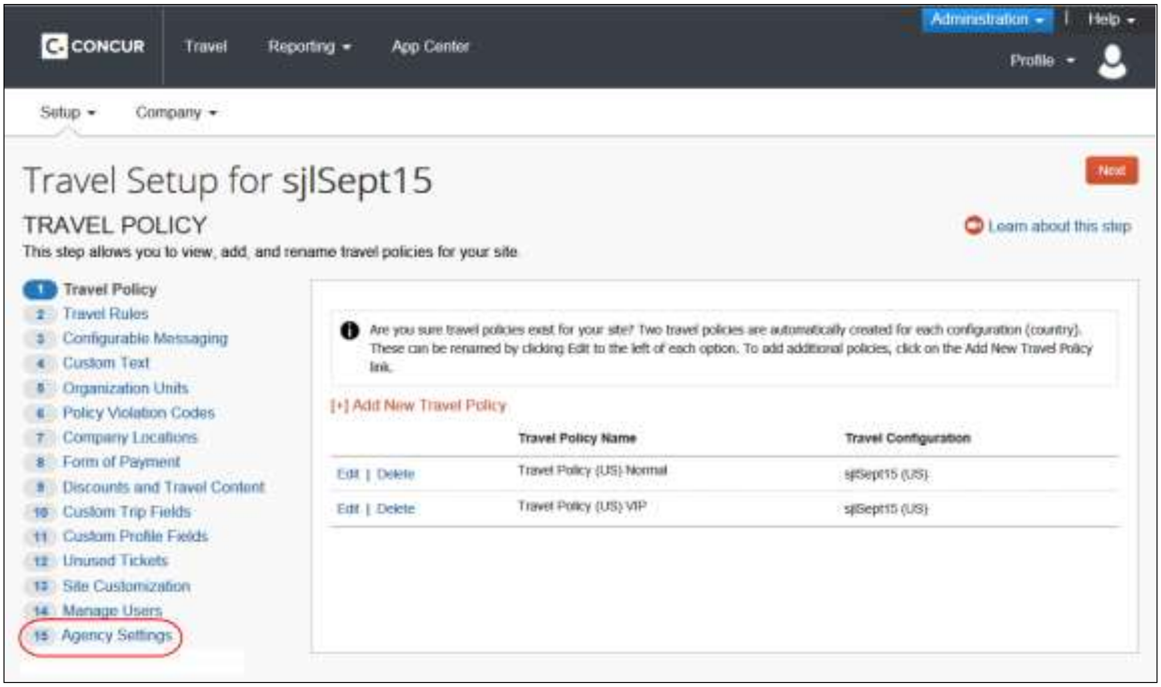
The first 14 steps match exactly the steps available when implementing Travel with Expense; the last 2 steps differ. Each is described on the remaining pages of this guide.

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

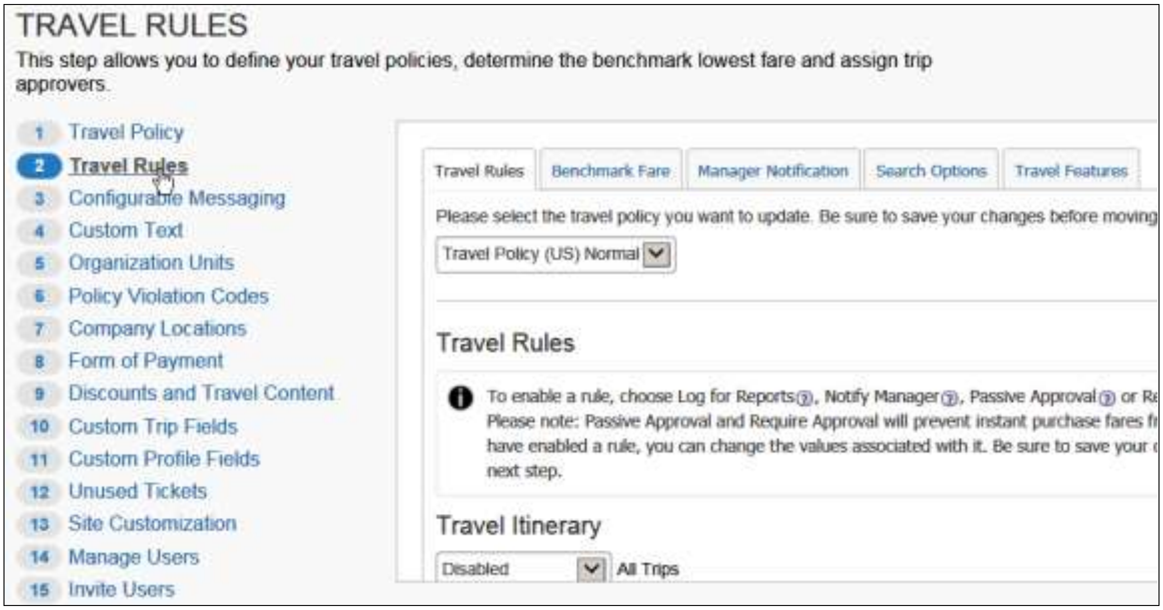
A *policy* is a collection of travel settings and preferences. Concur provides two travel policies per configuration. You can create an unlimited number of additional policies.

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

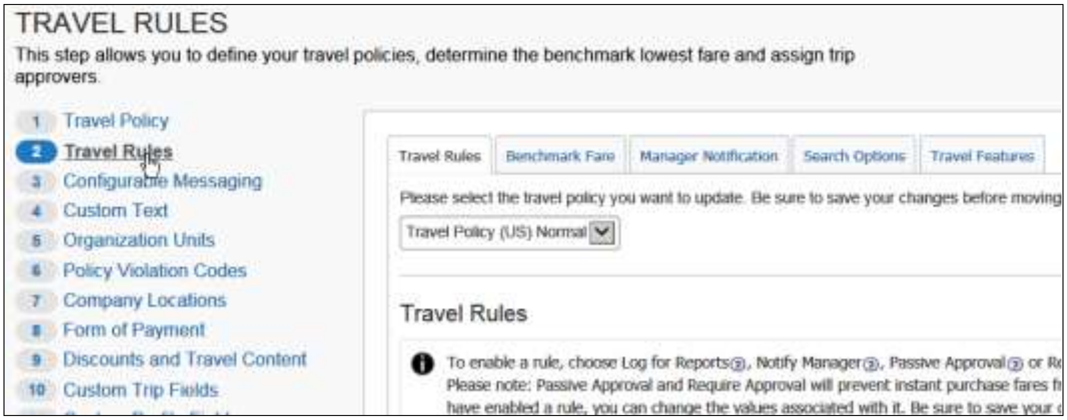


Tab	Description/Action
Travel Rules	Refer to the *Approvals, Rules, and Classes/Policies Travel Service Guide*.
Benchmark Fare	Refer to the *Lowest Logical Fare (LLF) / Benchmark Lowest Airfare Travel Service Guide*.
Manager Notification	Refer to the *Approvals, Rules, and Classes/Policies Travel Service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

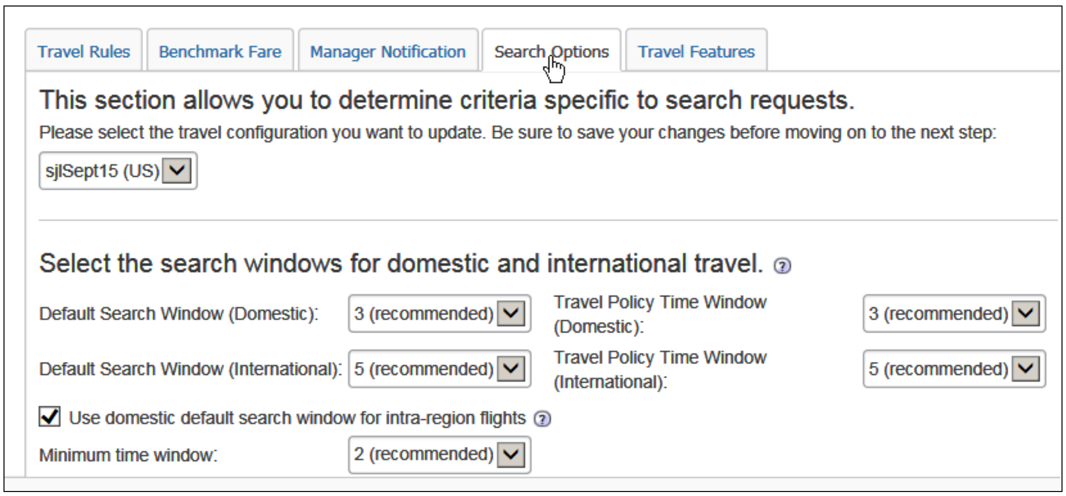
Define Search Options

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	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. **NOTE:** ***For Worldspan only***, the *Anytime* option will appear ***only*** for users if the **Maximum Window** field is set to 12 hours.
Use domestic search window for intra-region flights	On	Select to enable. **NOTES:** • *Domestic* is defined as within a country, for example, Chicago to New York. • *International* is defined as crossing a country border, for example, Paris to Hong Kong, China. Enabling this feature will cause intra-region itineraries to default to the domestic time window, for example, London to Frankfurt will become *domestic* rather than *international*.
Minimum time window	2 Hours	Select the minimum time window (in hours) that a user can define for searches.
Maximum time window	9 Hours	Select the maximum time window (in hours) that a user can define for searches. **NOTES:** • ***For Worldspan only***, the *Anytime* 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	Click one of these: • 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

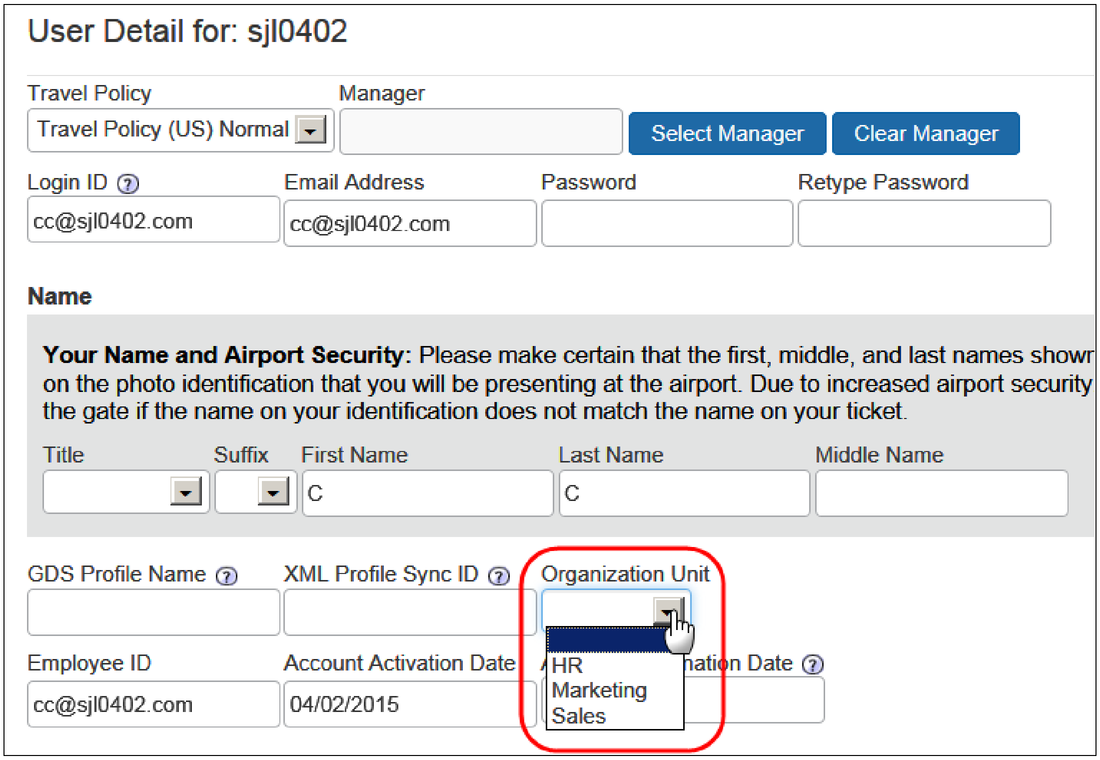
Overview

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 signification impact to their operational process.

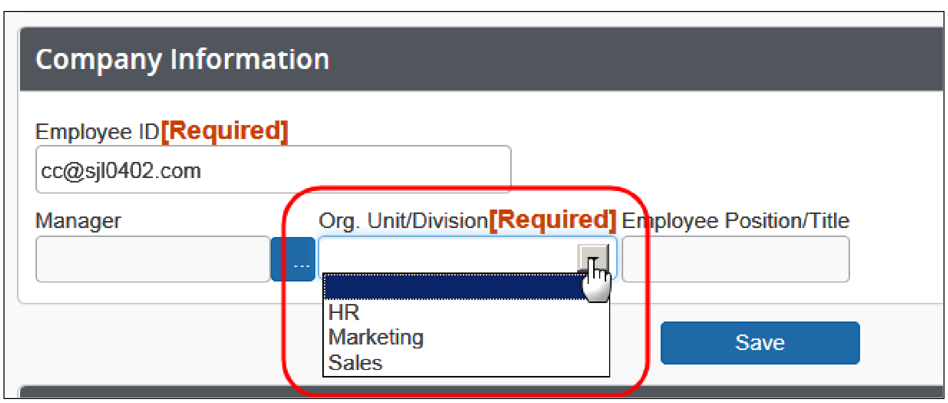
WHAT THE ADMIN SEES

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.



What the User Sees

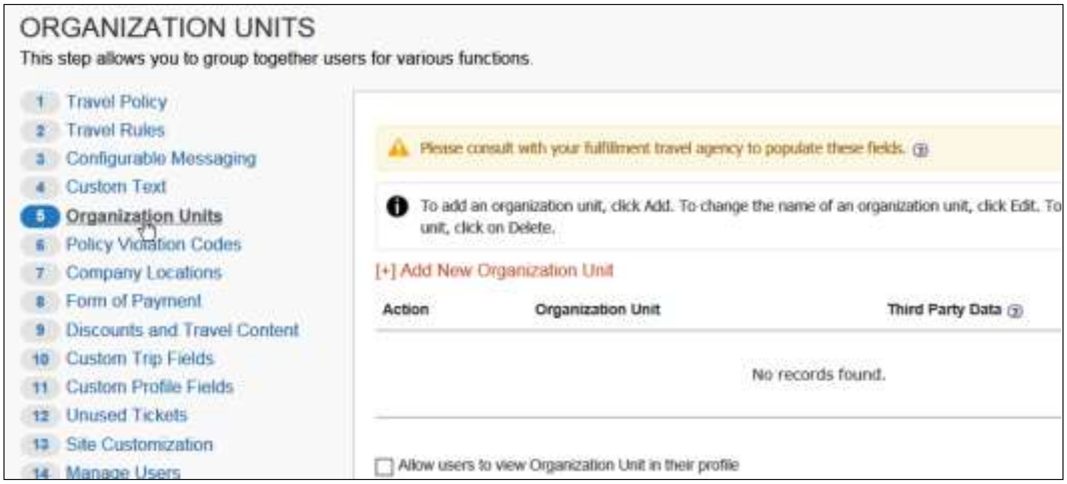
If enabled and made visible to users, the user sees the **Org Unit/Division** dropdown in his/her profile in the **Company Information** section. This will be set to either view-only or editable, depending on the configuration setup.



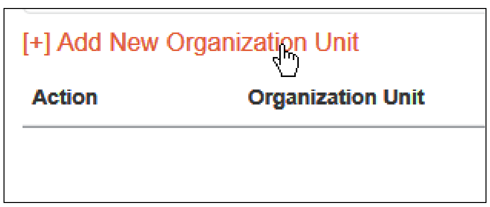
Add a New Organization Unit

To add a new Organization Unit:

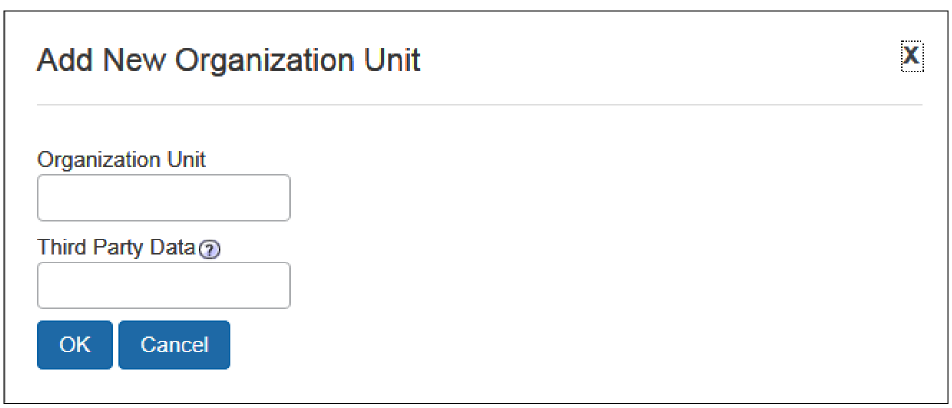
1. In the left-side menu, click **Organization Units**.



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.

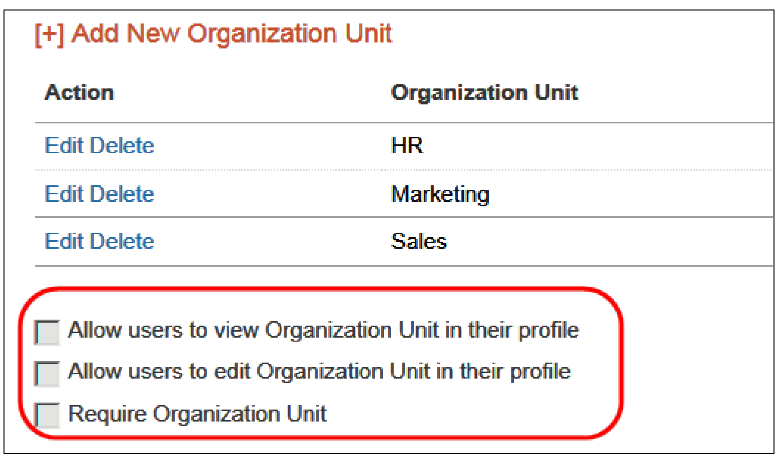
4. Click **OK**.

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

Work with Properties

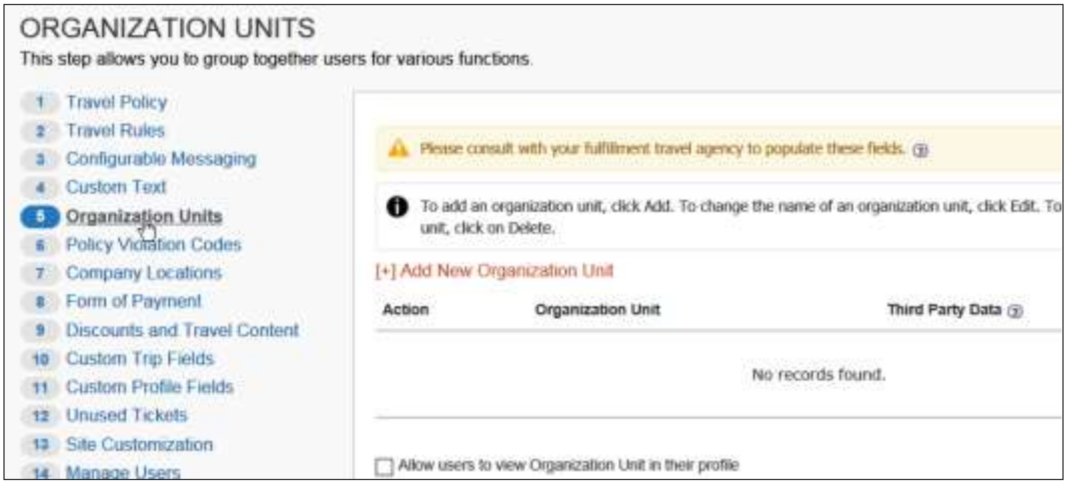
There are three options available via check boxes:

- 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



To use the properties:

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

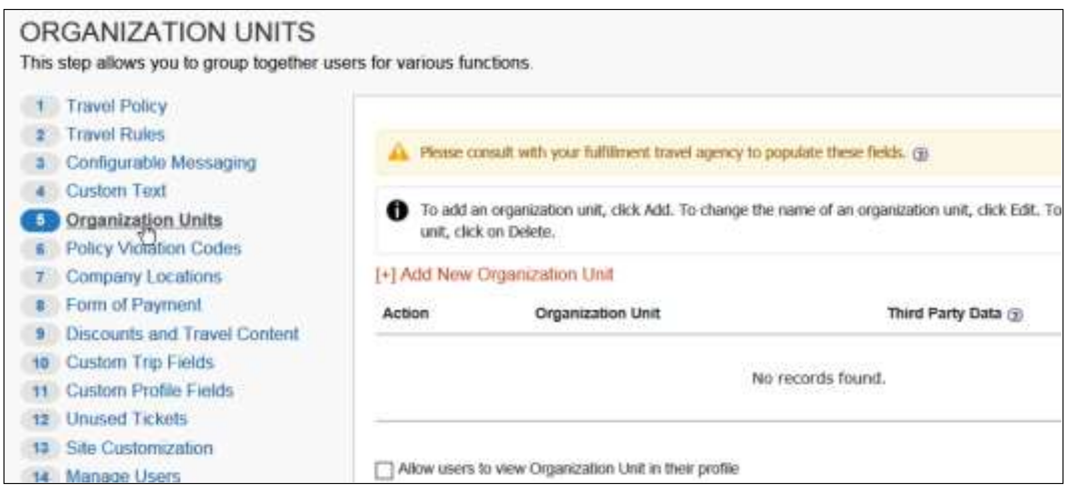


2. Select (enable) the desired properties.

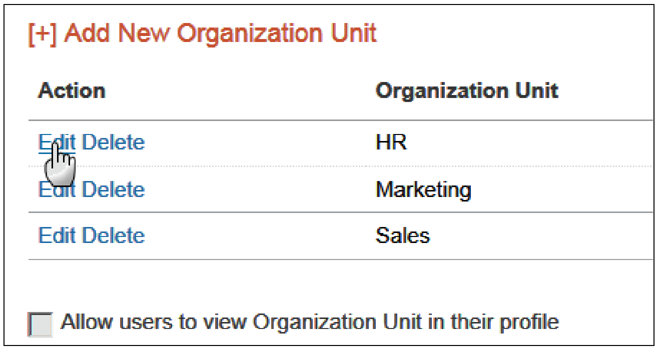
Modify an Organization Unit

To modify an organization unit:

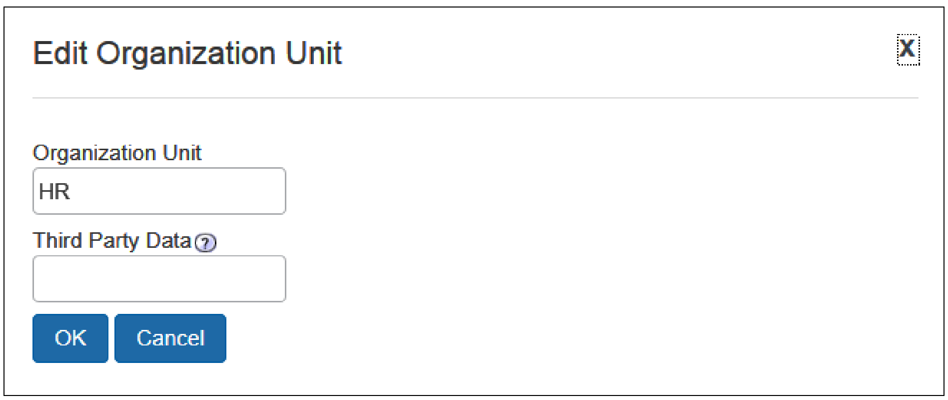
1. In the left-side menu, click **Organization Units**.


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
13 Site Customization
14 Manage Users
Please consult with your fulfillment travel agency to populate these fields.
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.
Allow users to view Organization Unit in their profile

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



The **Edit Organization Unit** window appears.

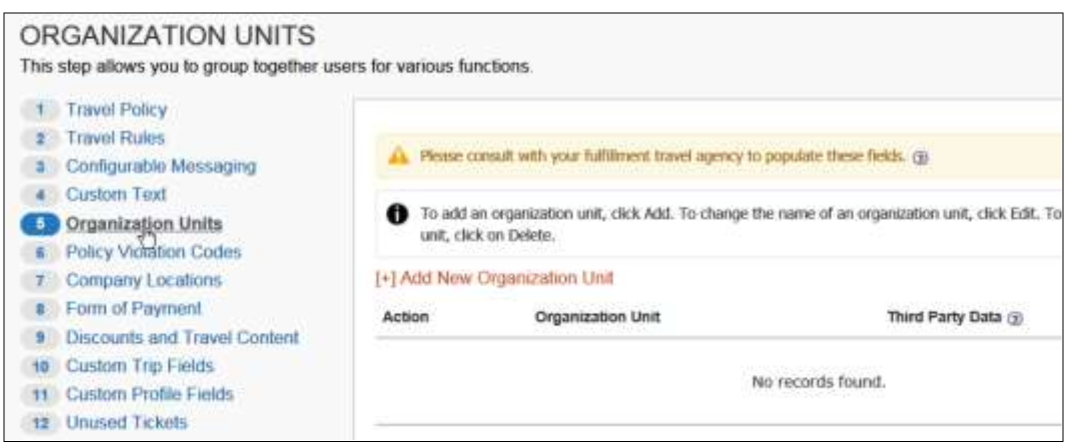


3. Make the appropriate changes.
4. Click **OK**.

Delete an Organization Unit

To delete an organization unit:

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



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

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.

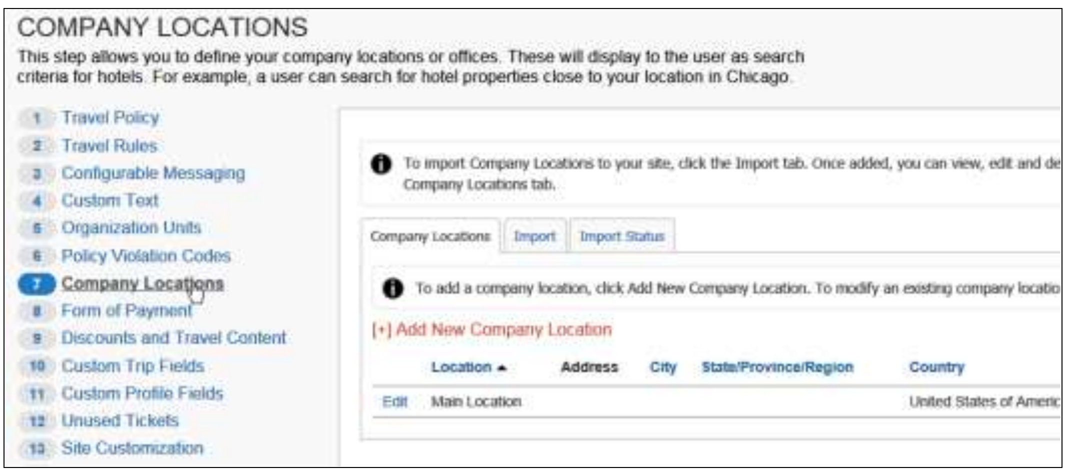
Best Practice tips:

- 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

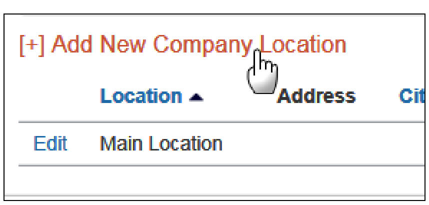
To create a new company location:

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

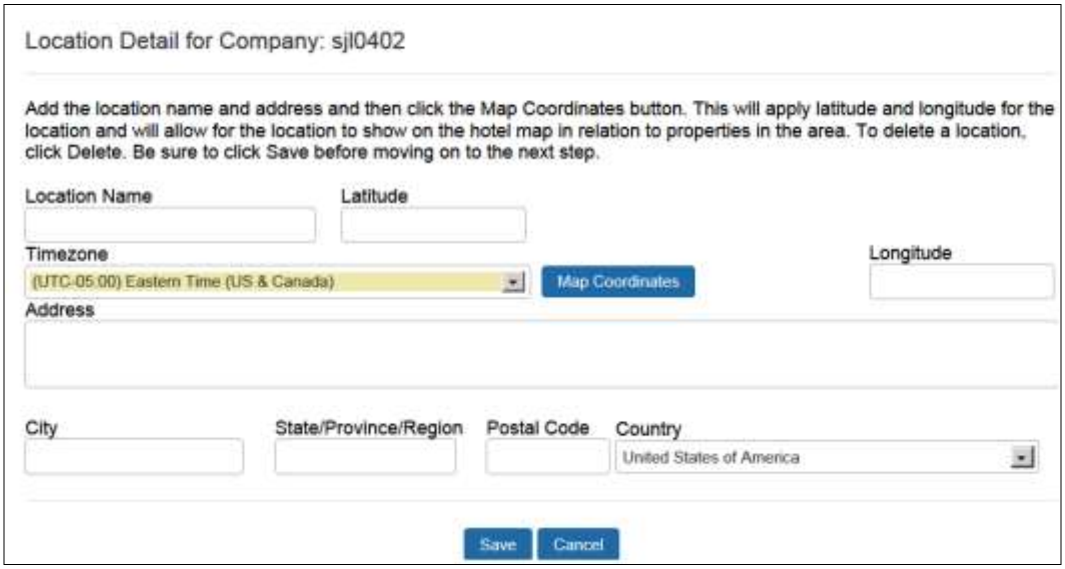


2. Click the **Company Locations** tab, if it is not already selected.

3. Click **Add New Company Location**.



The **Location Detail** window appears.



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

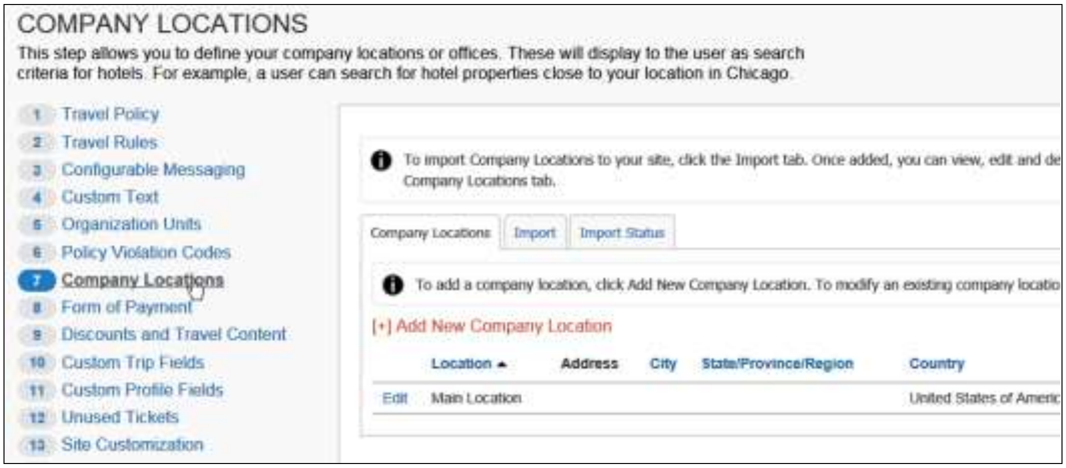
Field	Description/Action
Location Name	Enter a name for the location that will be relevant to the user. This name will appear when selecting locations to find a hotel.
Map Coordinates	Click this button to add the latitude and longitude for the location. If there is more than one possible result, Concur 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:***

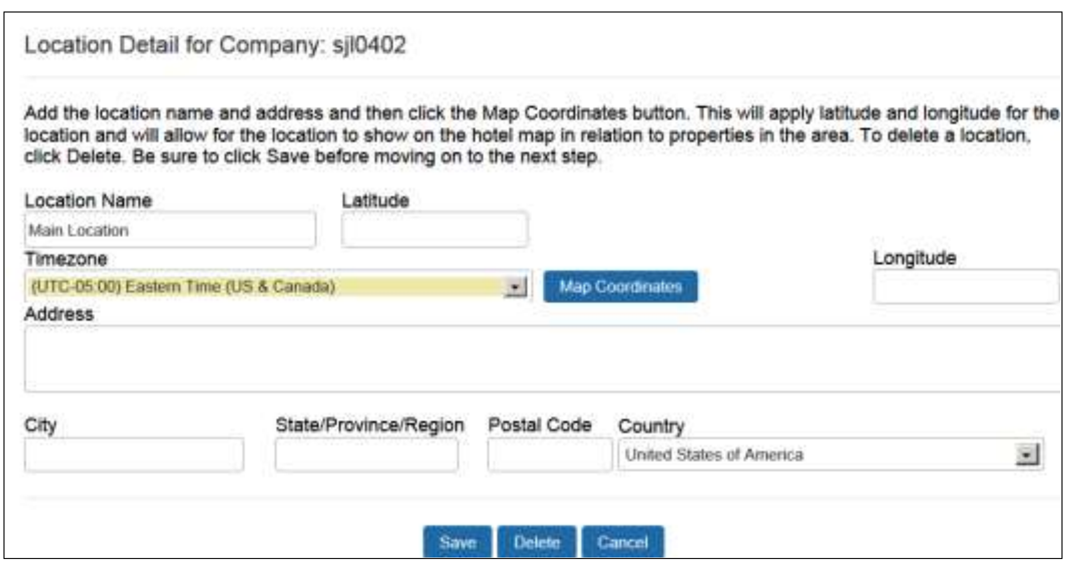
1. In the left-side menu, click **Company Locations**.



2. Click the **Company Locations** tab, if it is not already selected.

3. Click **Edit** for the desired location.

The **Location Detail** window appears.



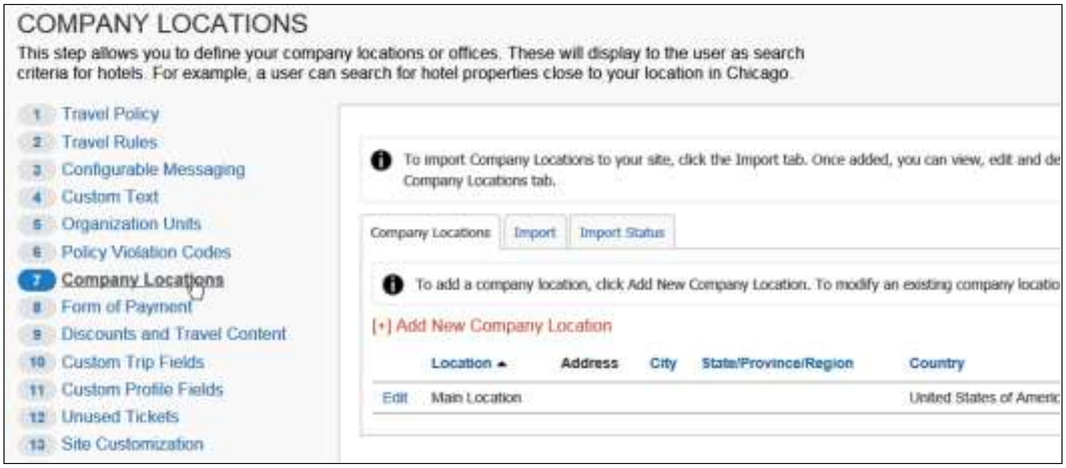
4. Edit the address for the location. (All fields are described above in the *Creating a New Company Location* section.)

5. Click **Save**.

Delete a Company Location Manually

To delete a location:

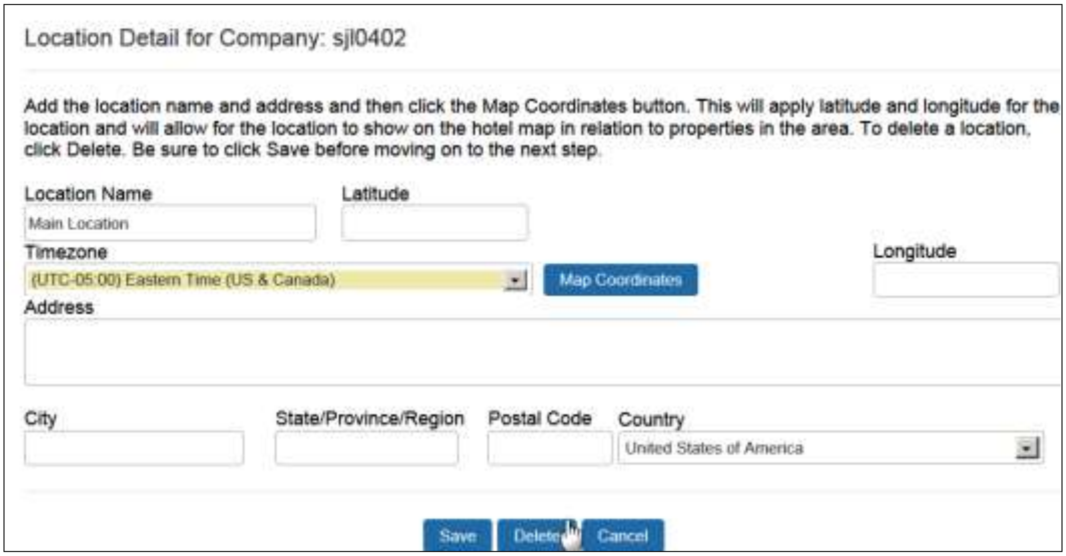
1. In the left-side menu, click **Company Locations**.



2. Click the **Company Locations** tab, if it is not already selected.

3. Click **Edit** for the desired location.

The **Location Detail** window appears.



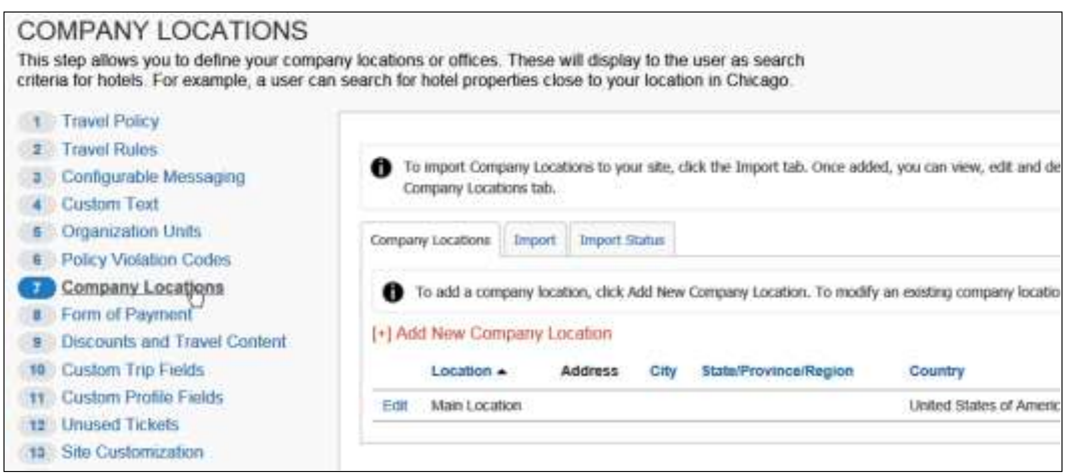
4. Click **Delete**.

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**.

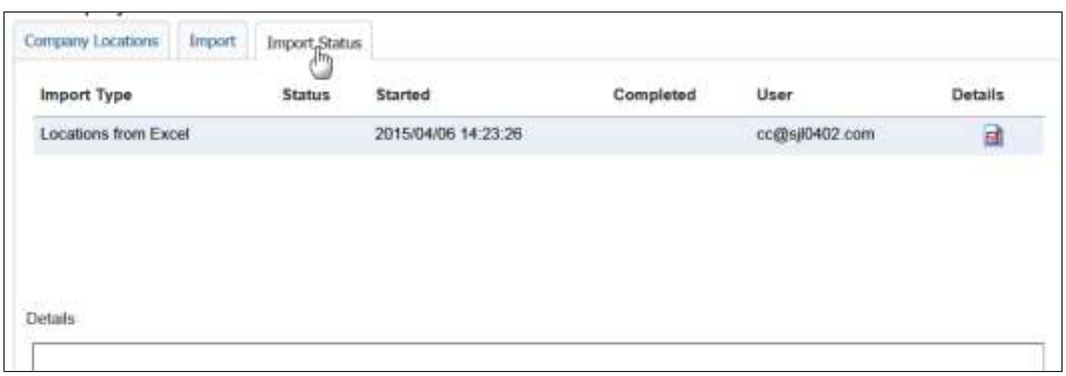


2. Click the **Import** tab.

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 most 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**.

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

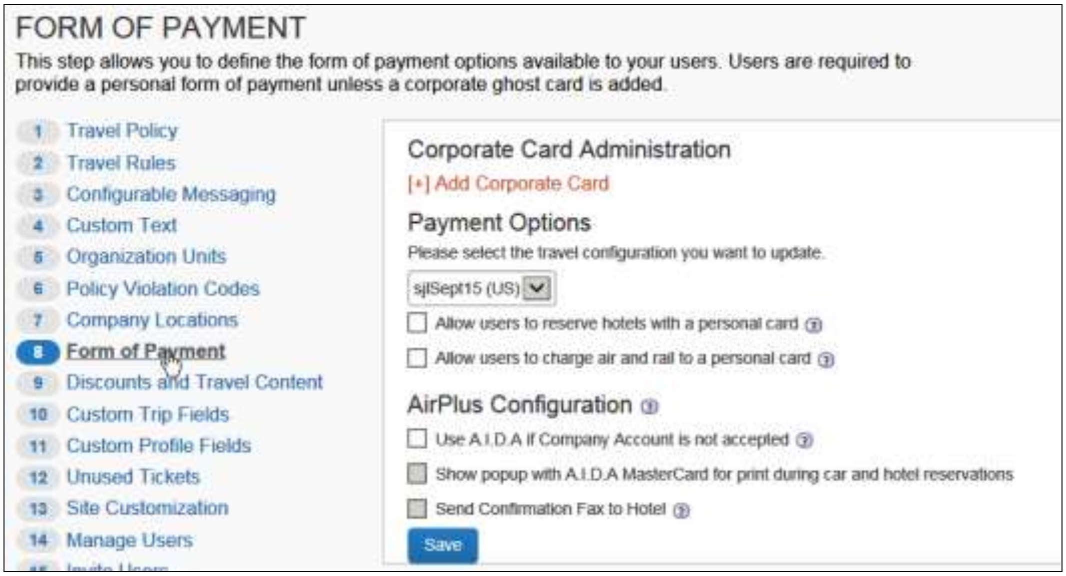
The AirPlus feature on this page is not available at this time.

> 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*.

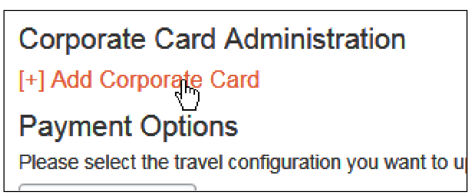
Add a New Corporate Ghost Card

To add a new corporate ghost card:

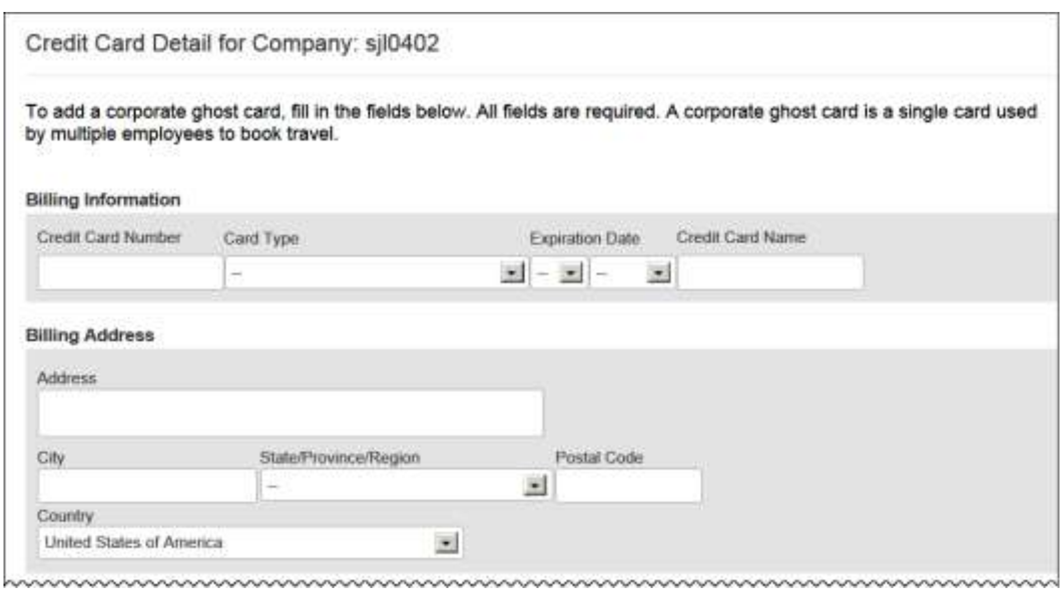
1. In the left-side menu, click **Form of Payment**.



2. Click **Add Corporate Card**.



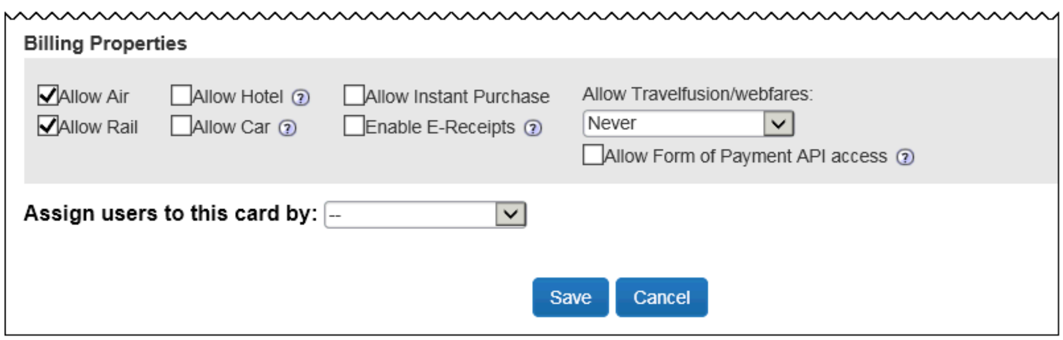
The **Credit Card Detail** window appears.



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 ***last*** 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.

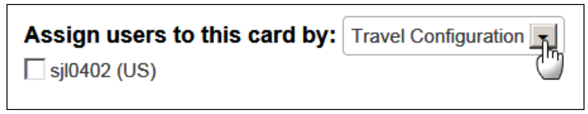
Scroll down to the next section.



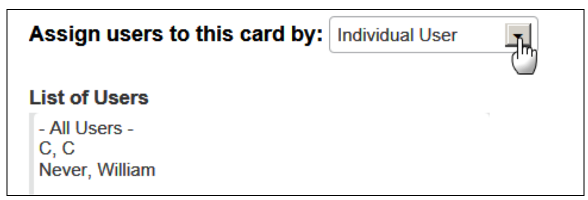
Field	Description/Action
Billing Properties	
Allow Air Allow Rail Allow Hotel Allow Car Allow Instant Purchase Enable E-Receipts Allow Travelfusion/ webfares	Select (enable) the check boxes for the segment types that can be charged/guaranteed to the card. Air and Rail will be defaulted to ON.
Allow Form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

<table>
<tr><th>Field</th><th>Description/Action</th></tr>
<tr><td colspan="2"><users></td></tr>
<tr><td>Assign users to this card by</td><td>
Click one of these:

Travel Configuration
Organization Unit
Individual User

Travel Configuration:
If you select Travel Configuration, the available travel configurations appear.


Select (enable) the desired configuration(s).
Organization Unit:
If you select Organization Unit, the available organization units appear.


Select the desired unit.
Individual User:
If you select Individual User, the available users appear.


Select the desired user(s) and click Add.
</td></tr>
</table>

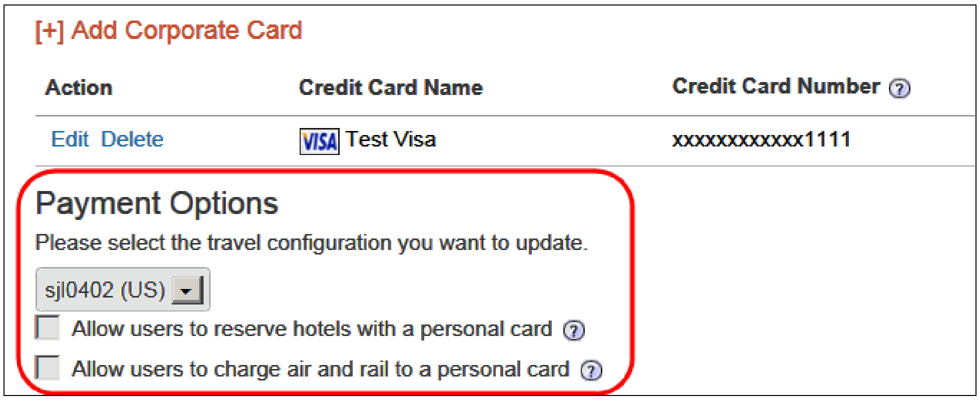
4. Click **Save**. Once a card has been added, the screen refreshes and the grid updates.

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.

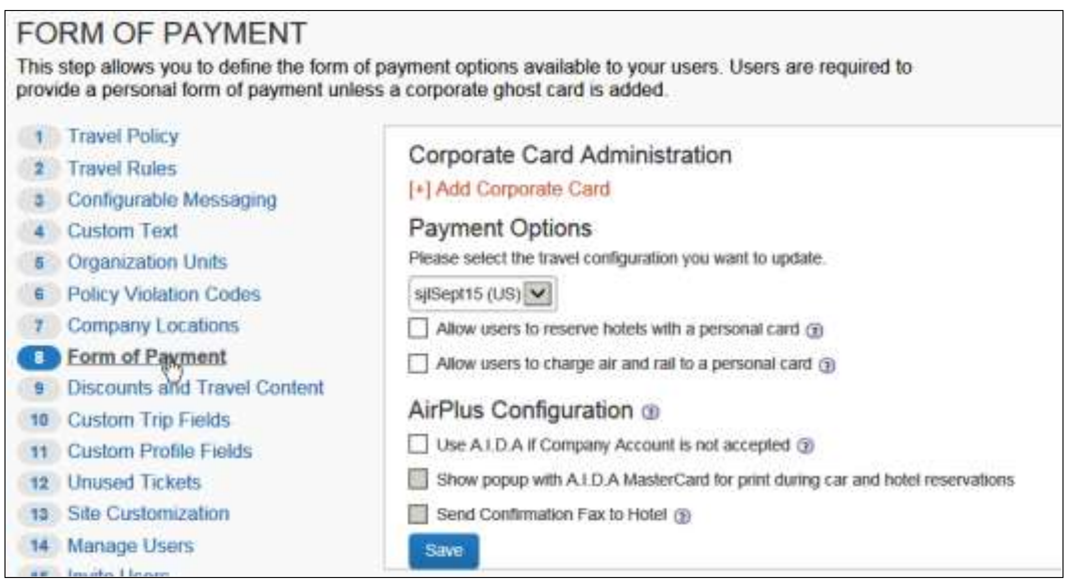
The admin can define:

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



To define payment options:

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



2. In the **Payment Options** section, select the desired travel configuration.

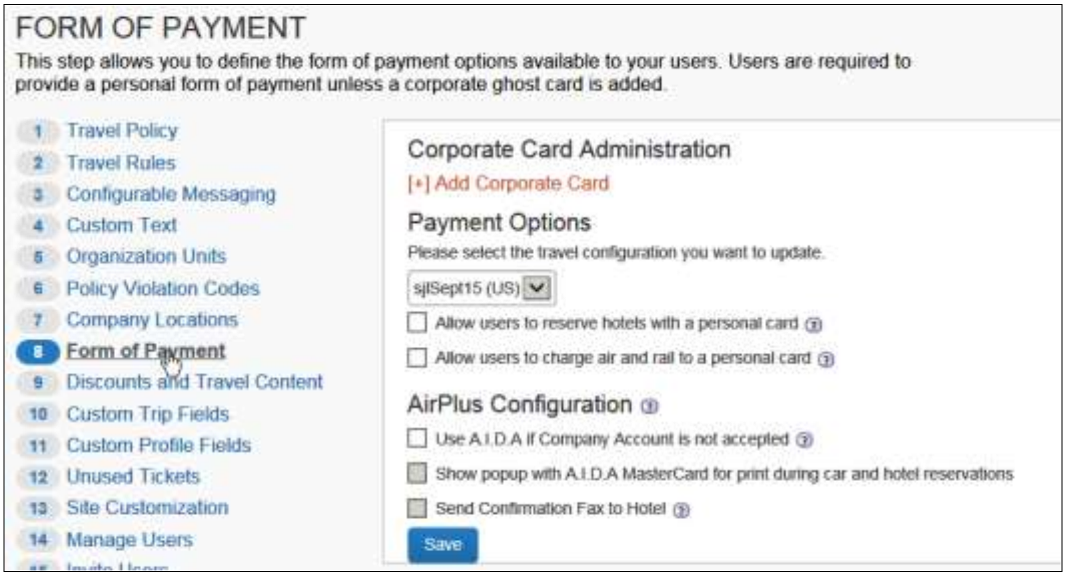
3. Select (enable) one or more of these settings:
   - Allow users to reserve hotels with a personal card
   - Allow users to charge air and rail to a personal card

4. Click **Save**.

Edit a Corporate Ghost Card

- ***To edit a corporate ghost card:***

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



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

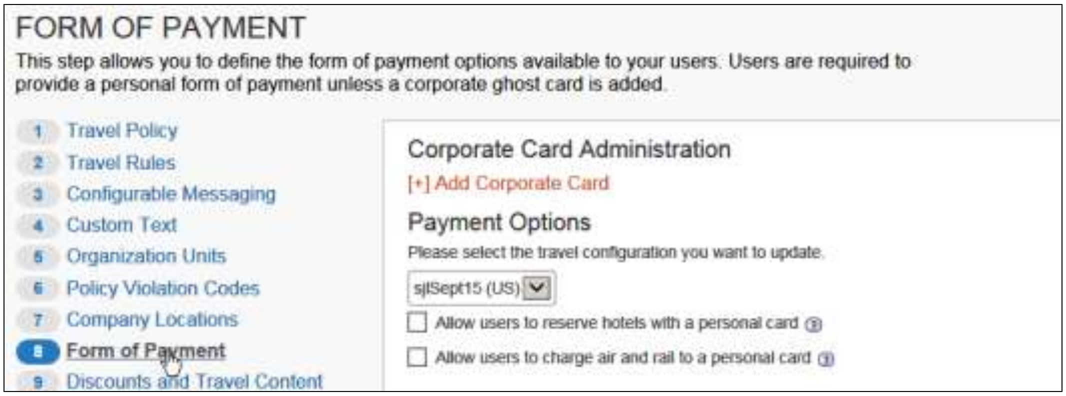
The **Credit Card Detail** window appears.

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

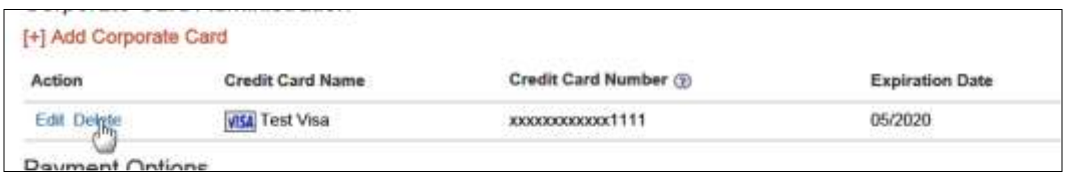
Delete a Corporate Ghost Card

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

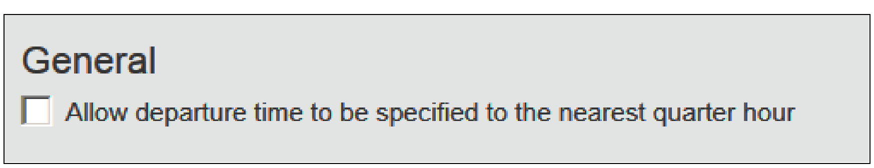
For complete details, screen captures, and setup steps, refer to the *Travelfusion Direct Connect Travel Service Guide*.

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



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*.

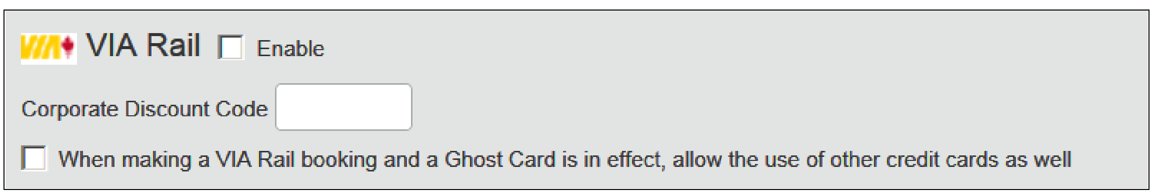
Trainline

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



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

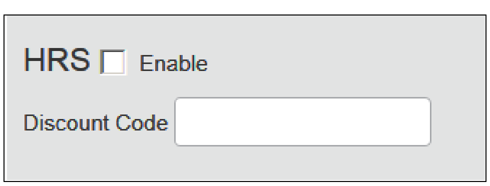
For this feature/option, ***additional steps are required***. In some cases, the required steps must be completed ***before*** using the Travel setup wizard (like obtaining a vendor agreement).

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



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

To enable:

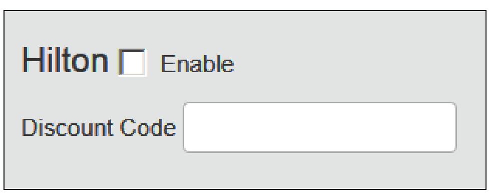
Field	Description/Action
Enable	Select to enable.
Corporate Discount Code	Enter the code.

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



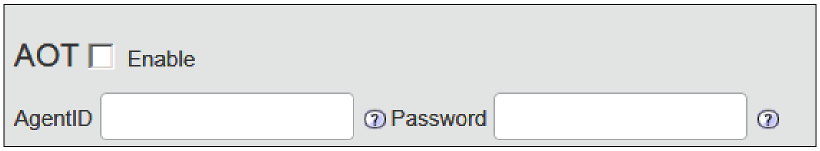
To enable:

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

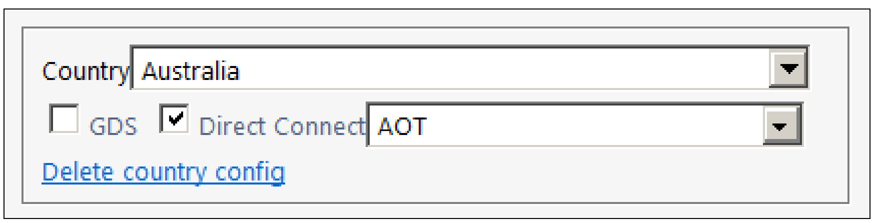
⚠ **IMPORTANT:** AOT is currently available ***only*** for AMEX in Australia.



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: 1. Set the number of characters available in the **Max Length** field. 2. Choose whether to enter optional values. ♦ 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.

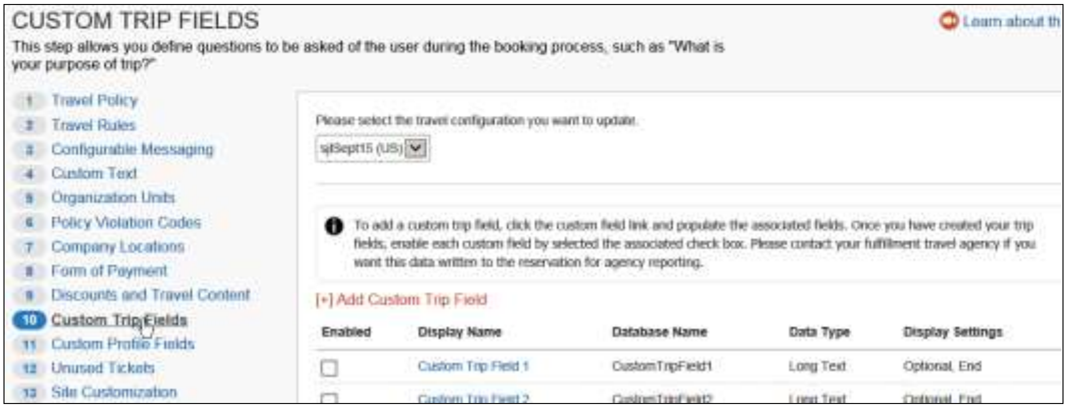
Guest Travel Bookings

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

Configure and Enable a Custom Trip Field

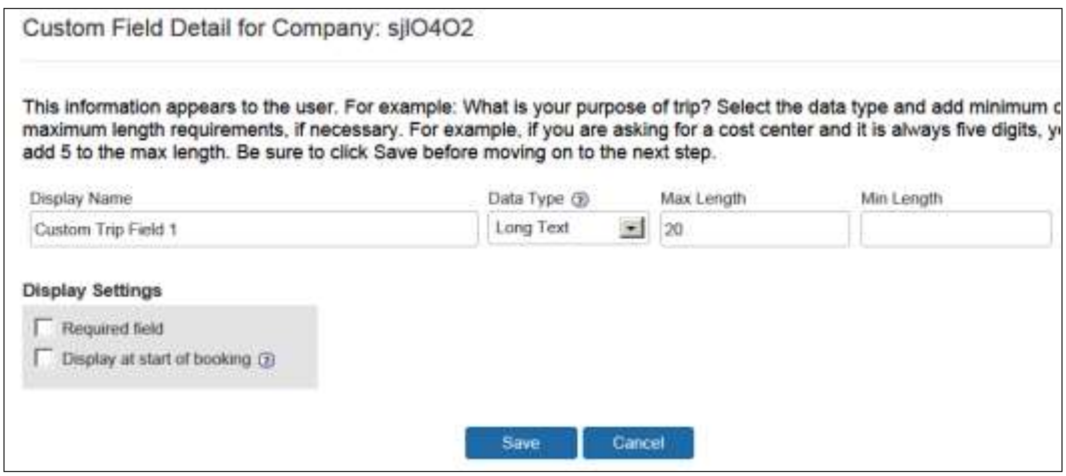
To configure a new custom trip field:

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



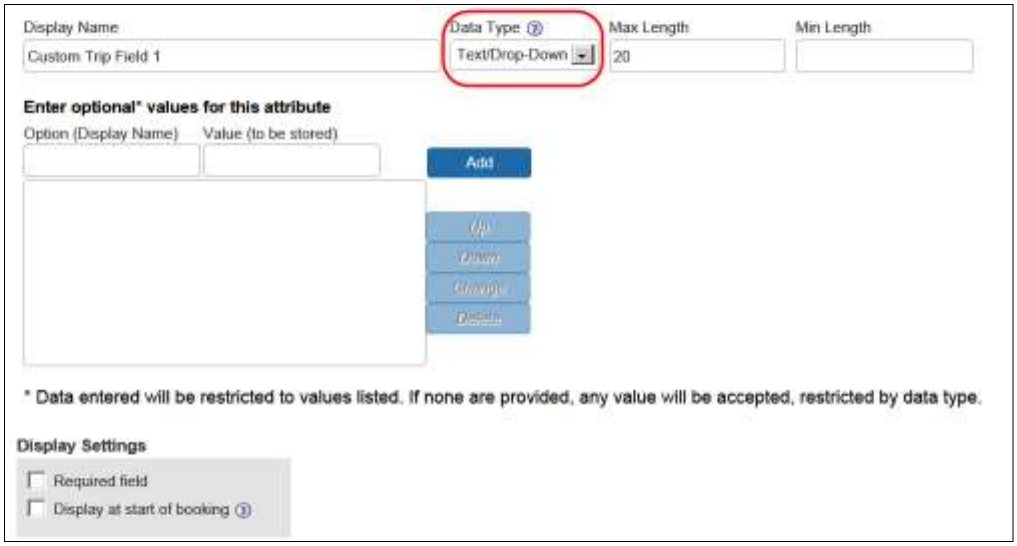
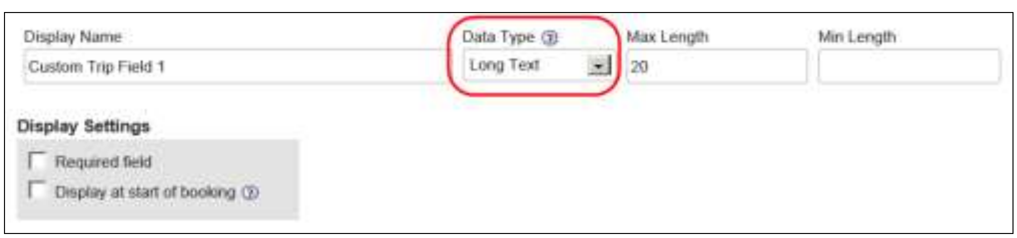
2. Select the desired configuration.

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

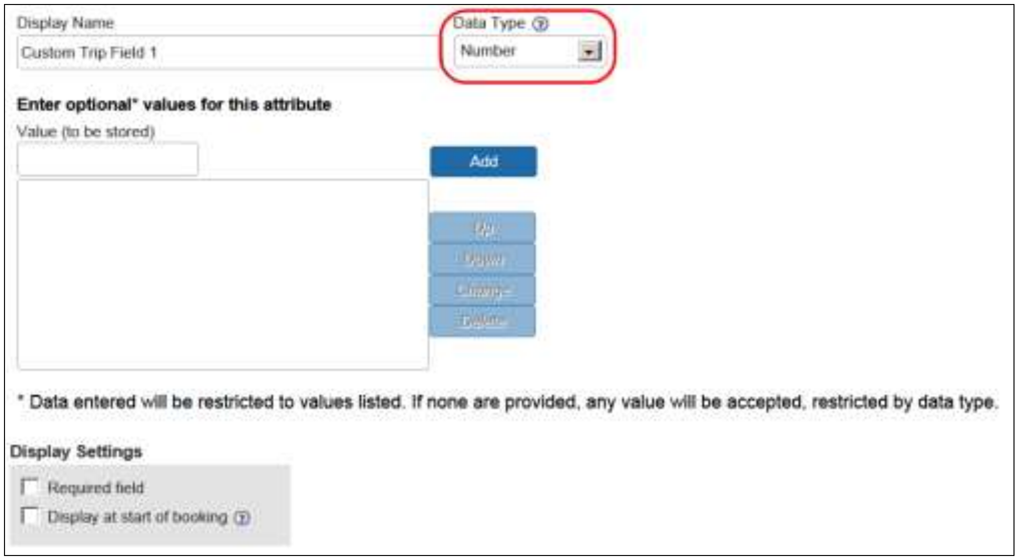


4. Make the appropriate choices as described in the following table.

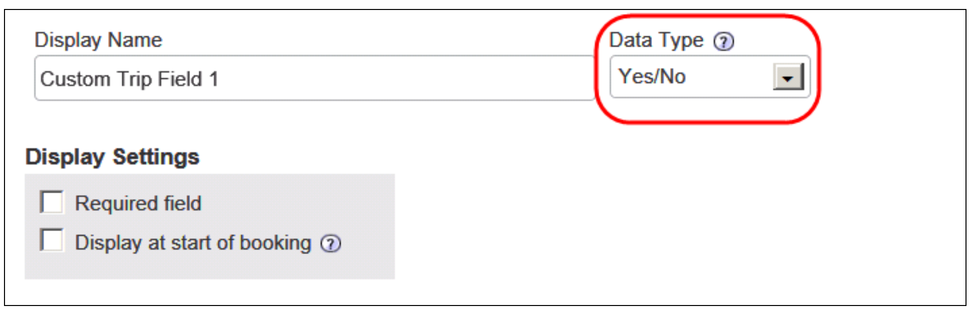
Field	Description/Action
Display Name	Text that should appear to the user. Example: What is your purpose of trip? **NOTE:** Best practice is to ***not*** allow personal, sensitive, or uniquely identifying information in custom fields.

<table>
<tr><th>Field</th><th>Description/Action</th></tr>
<tr><td>Data Type</td><td>Select one of these:
Text /Drop-Down
Long Text
Number
Yes/No</td></tr>
<tr><td colspan="2">For Text/Drop-Down</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>Max Length / Min Length</td><td>Minimum and maximum character length</td></tr>
<tr><td>Enter optional values for this attribute</td><td>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.</td></tr>
<tr><td colspan="2">For Long Text</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>Max Length / Min Length</td><td>Minimum and maximum character length</td></tr>
</table>

Field	Description/Action
For Number	



Field	Description/Action
Enter optional values for this attribute	To create the dropdown menu, add each option to the **Value** field and click **Add**.
For Yes/No	



Field	Description/Action
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.

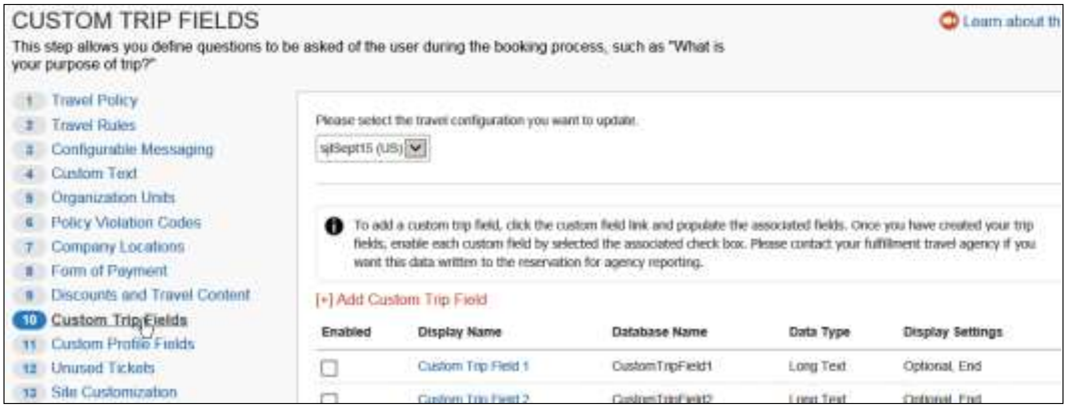
5. Click **Save**.

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

Add More Custom Trip Fields

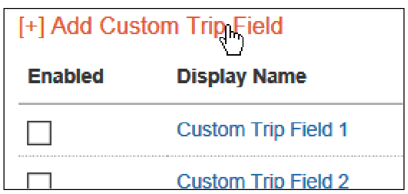
To add more custom fields:

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

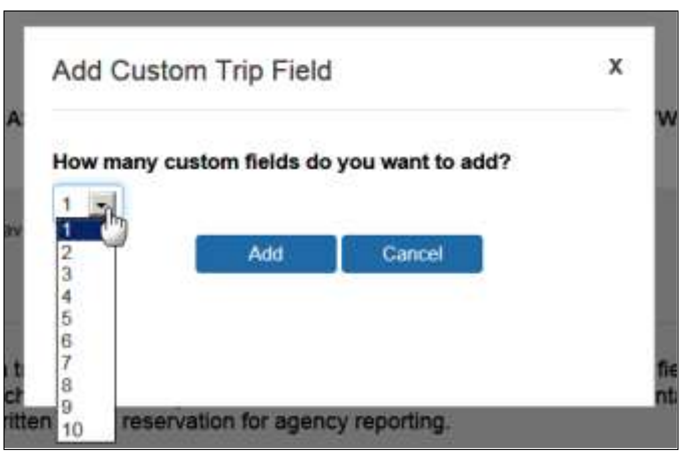


2. Select the desired configuration.

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.

<table>
<tr><th>Field type</th><th>Description/Action</th></tr>
<tr><td>Text/Drop-Down</td><td>Creates a text or dropdown menu
For this field type:
1. Set the number of characters available in the Max Length field.
2. Choose whether to enter optional values.
♦ 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.</td></tr>
<tr><td>Long Text</td><td>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.</td></tr>
<tr><td>Number</td><td>Creates a list of numbers</td></tr>
<tr><td>Yes/No</td><td>Create a Yes/No list</td></tr>
</table>

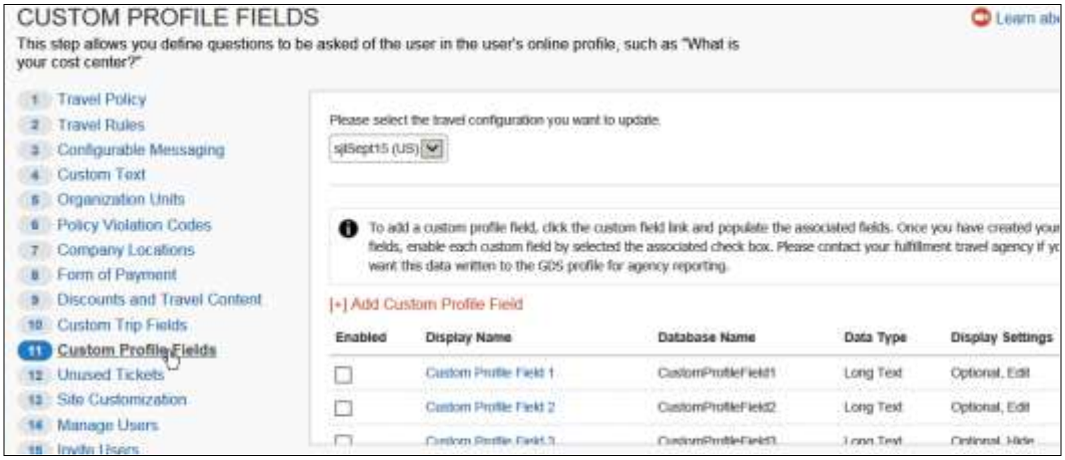
ORDER OF DISPLAY

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

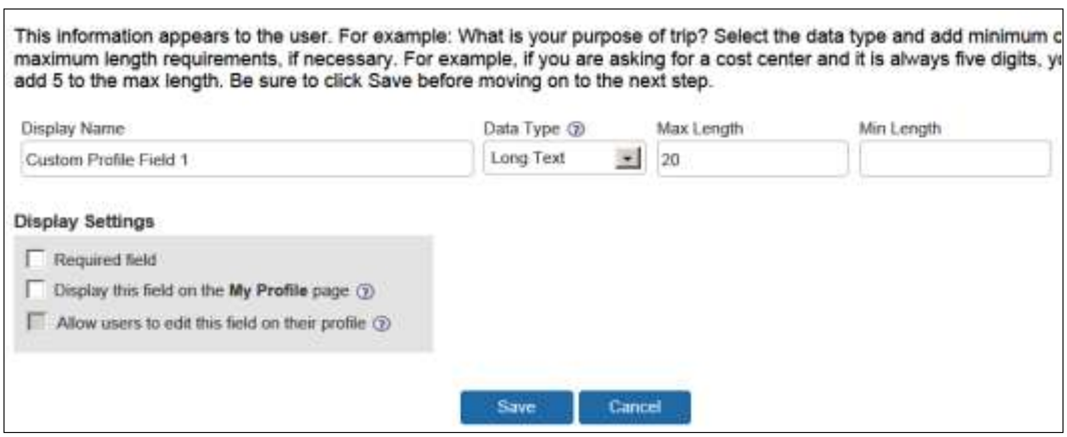
- ***To configure a custom profile field:***

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



2. Select the desired configuration.

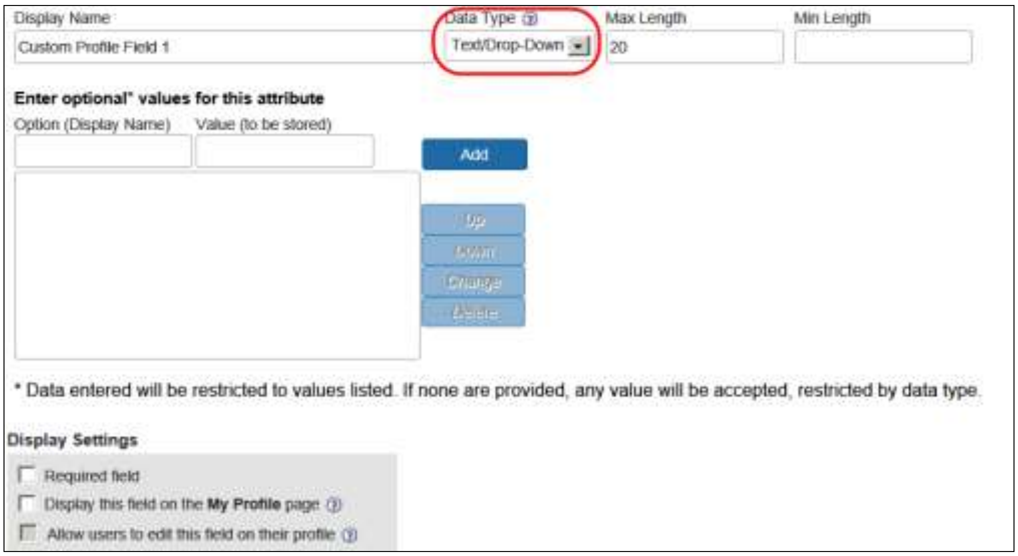
3. Click the name of the custom field (ex: Custom Profile Field 1).



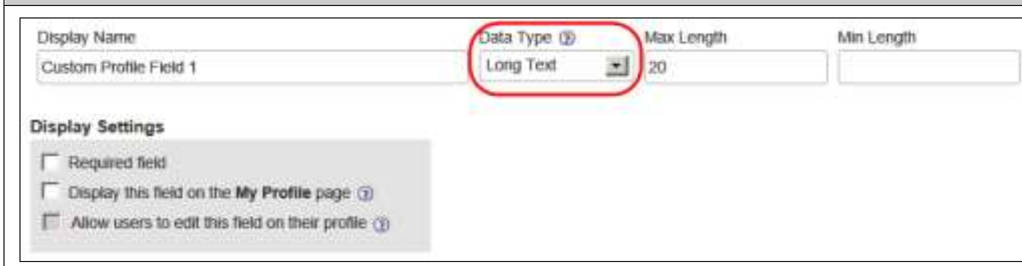
4. Make the appropriate choices as described in the following table.

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: • 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	

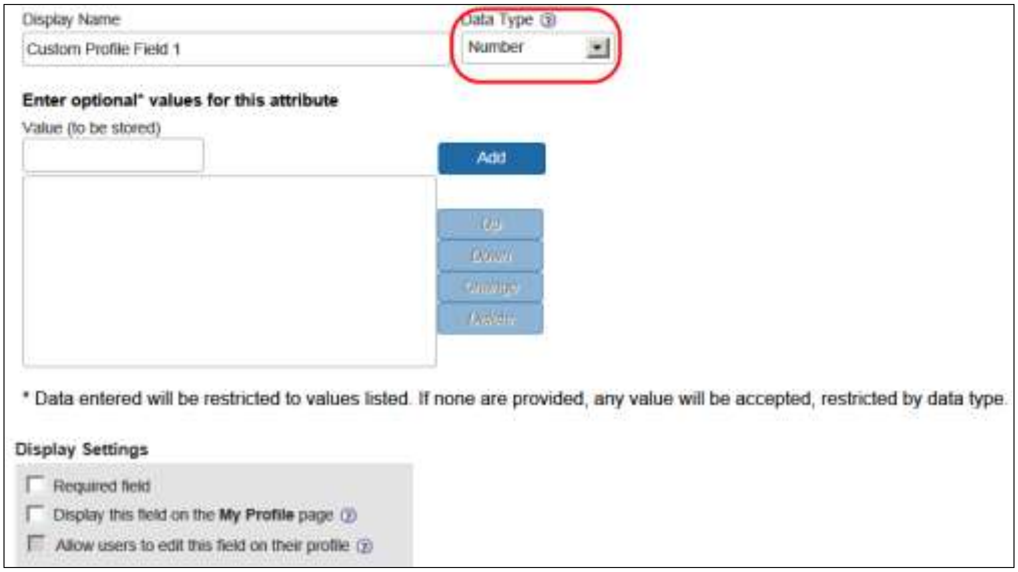


Field	Description/Action
Max Length / Min Length	Minimum and maximum character length
Enter optional values for this attribute	To create the dropdown menu, add each option to the **Option** field and click **Add**. If you want a different value than the display name, then also add the **Value**. Example: 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	



Field	Description/Action
Max Length / Min Length	Minimum and maximum character length

Field	Description/Action
For Number	



Field	Description/Action
Enter optional values for this attribute	To create the dropdown menu, add each option to the **Value** field and click **Add**.
For Yes/No	

Field	Description/Action
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.

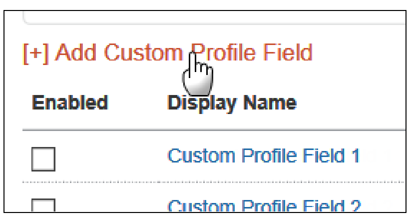
Add More Custom Profile Fields

▸ To add more custom fields:

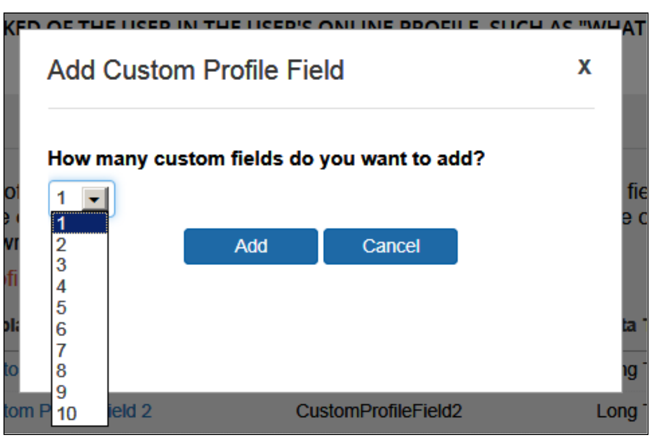
1. In the left-side menu, click **Custom Profile Fields**.

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.

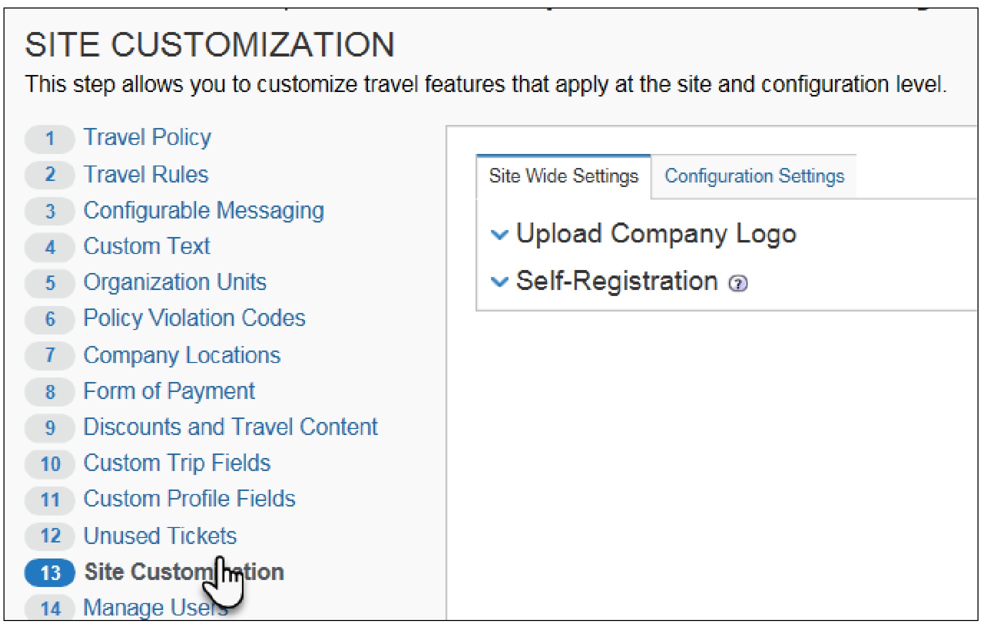
Note the following:

- 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.

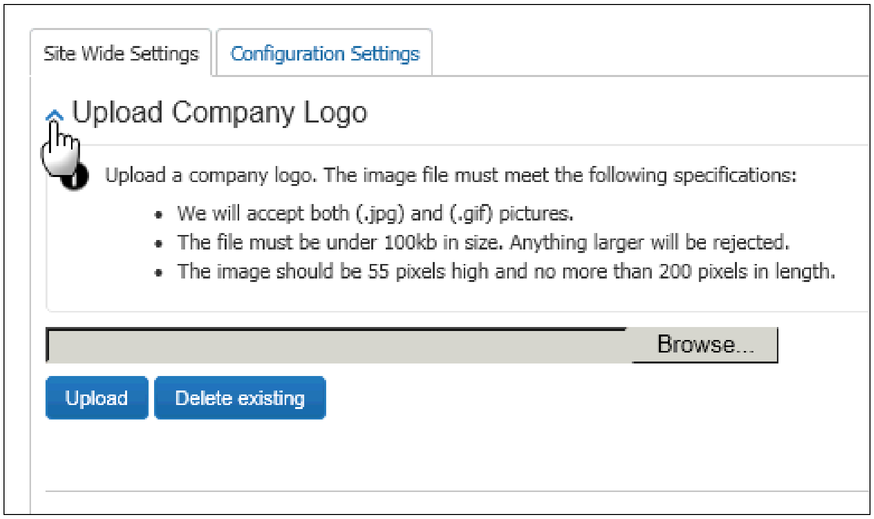
To upload a company logo:

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



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

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



4. Click **Browse**/**Choose File** (depending on the browser) to locate your company logo.

5. Click **Upload** once you locate the logo file.

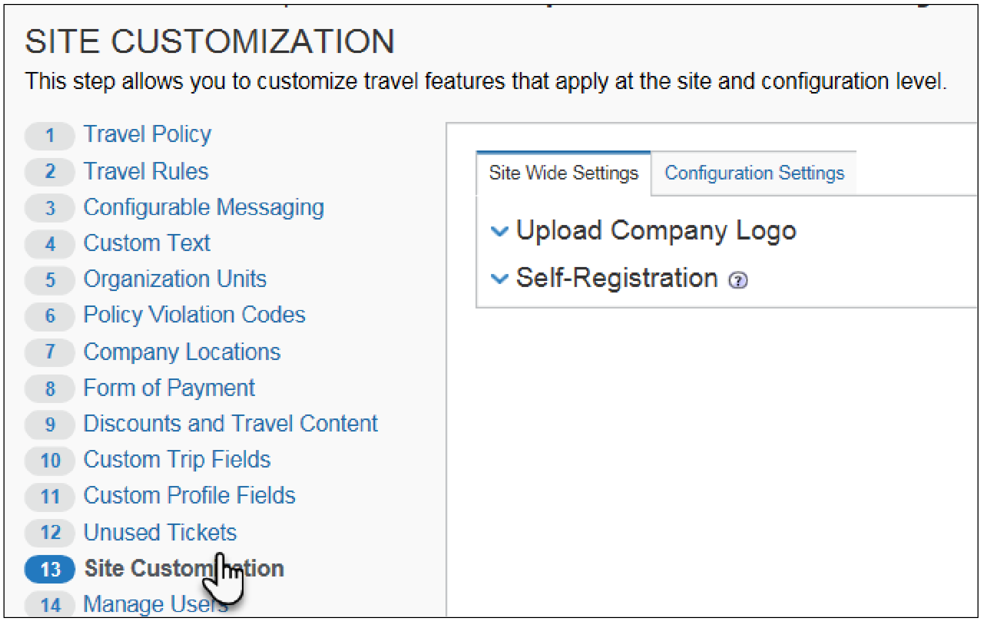
Set Up Self-Registration

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

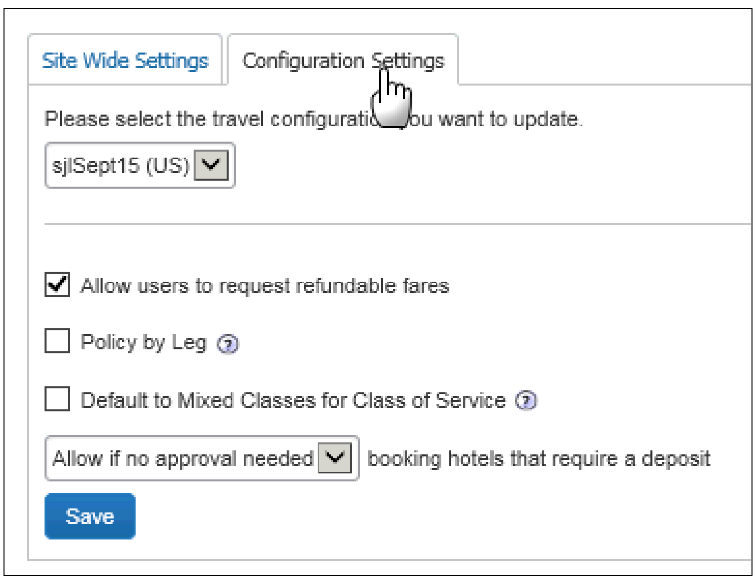
Allow/Disallow Refundable Fares; Allow/Disallow Booking Hotels with Deposit; Allow/Disallow Policy by Leg (Flex Faring); Default to Mixed Classes (Flex Faring)

- ***To change these settings:***

1. 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 *Flex-Faring Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Mixed Classes* and ensure the search results for all cabins allowed for the user will be returned. Refer to the *Flex-Faring Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* in the appendix of this guide.
…booking hotels that require a deposit	Select one of these: • 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

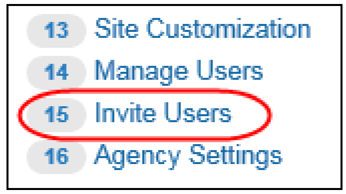
All situations are described on the following pages.

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:

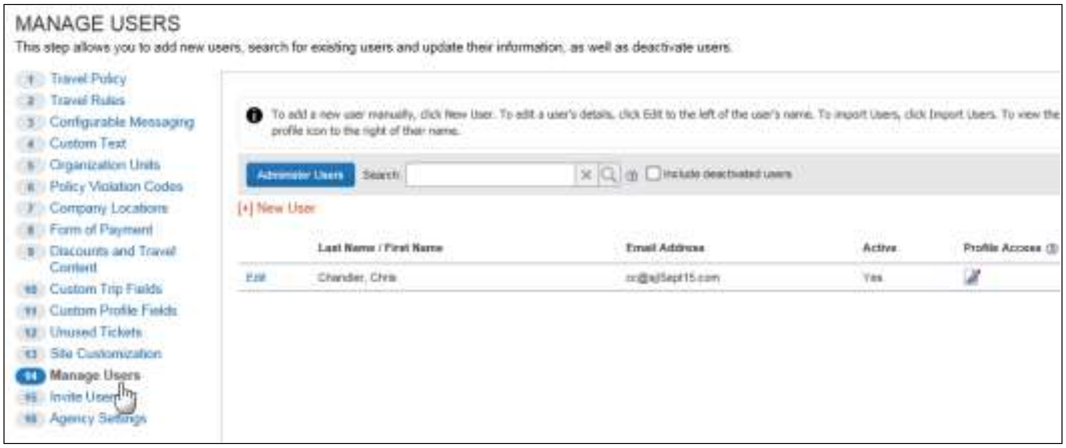
- *Add* users via import on the **Users** page in Product Settings. On the **Users** page, click **Import Users** to download a spreadsheet.
- *Modify* user information via import using the **Manage Users** step in the Travel Setup Wizard.

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).

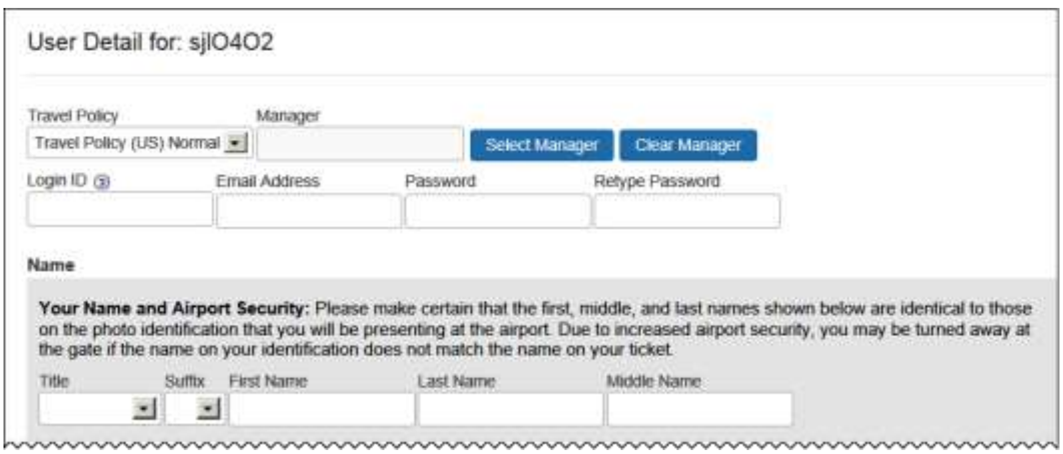
Manually Add a New User – Travel WITHOUT Expense

To add a new user:

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



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



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	Select the user's manager's name. • 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. You can also define at the travel-class level via the **Travel Policy** step.

Field	Description/Action
Login ID	Enter the user's ID for logging in to Travel. • ***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	Enter the user's email address • ***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	Enter the password for logging in to Travel. This is the field to use if you want to reset a password as well. 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.
Title, First Name, Middle Name, Last Name, Suffix	Enter or select as appropriate. **IMPORTANT!** The user's name should always be the name that appears on his/her identification for travel purposes.

Scroll down to the next section.

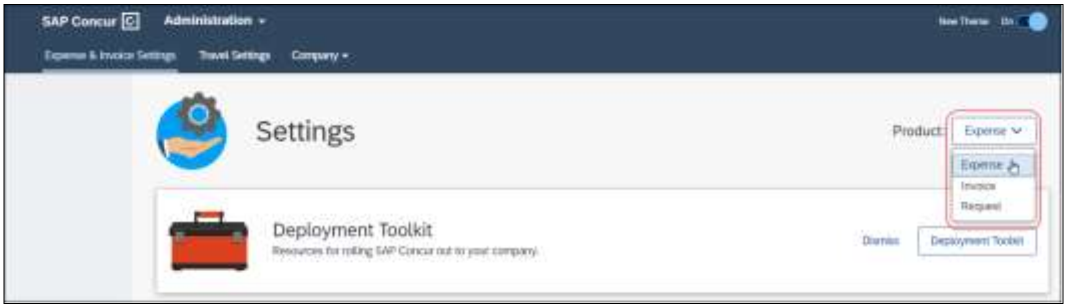
Field	Description/Action
GDS Profile Name	Provided by the TMC
XML Profile Sync ID	Either: • If the field is already populated, make no changes; the field has been configured to provide either the Login ID or the Employee ID. • If the field is blank, enter the identifier as defined by your company or 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: • **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 *TripLink User Guide*. • **Data Retention Administrator:** Not yet available; do not use

4. Click **Save**.

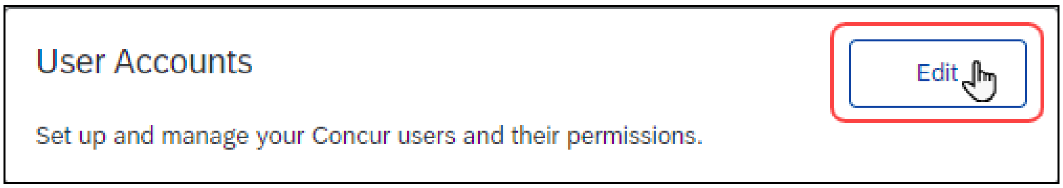
Manually Add a New User – Travel WITH Expense

To add a new user:

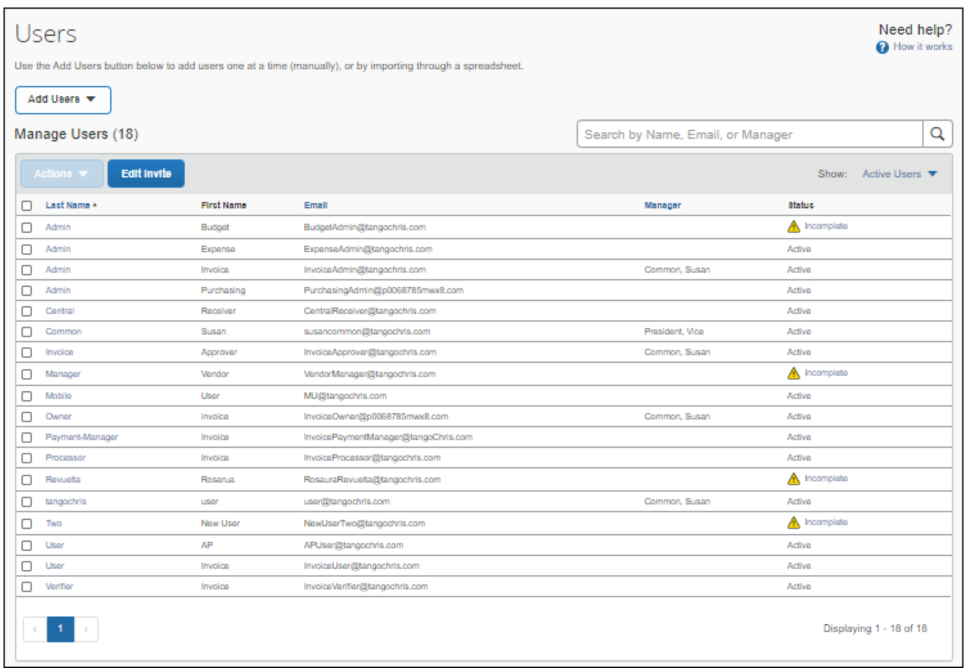
1. Click **Administration > Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list click *Expense*.



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

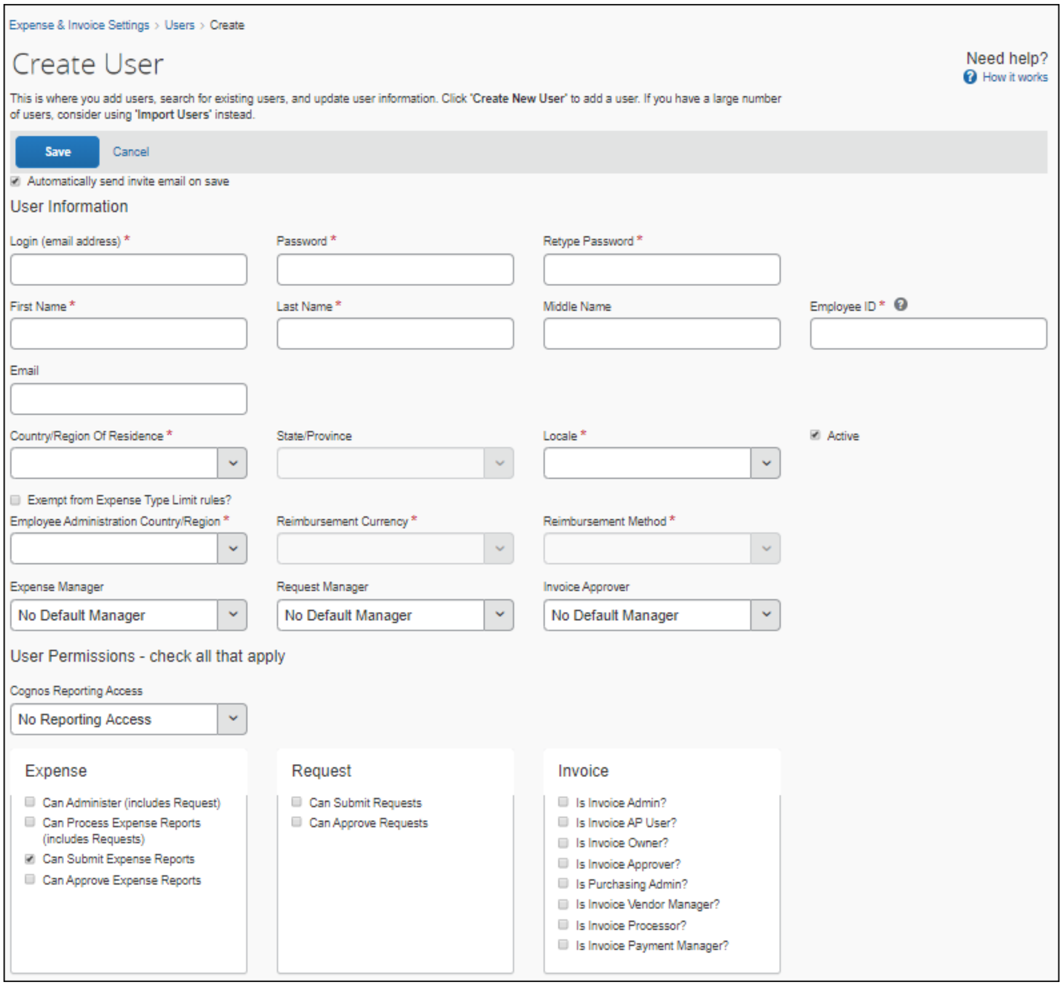


The **Users** page appears.

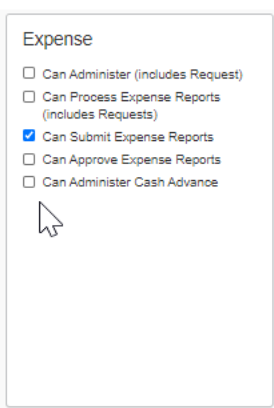


On the **Users** page, click **Create New User** to add a new user.

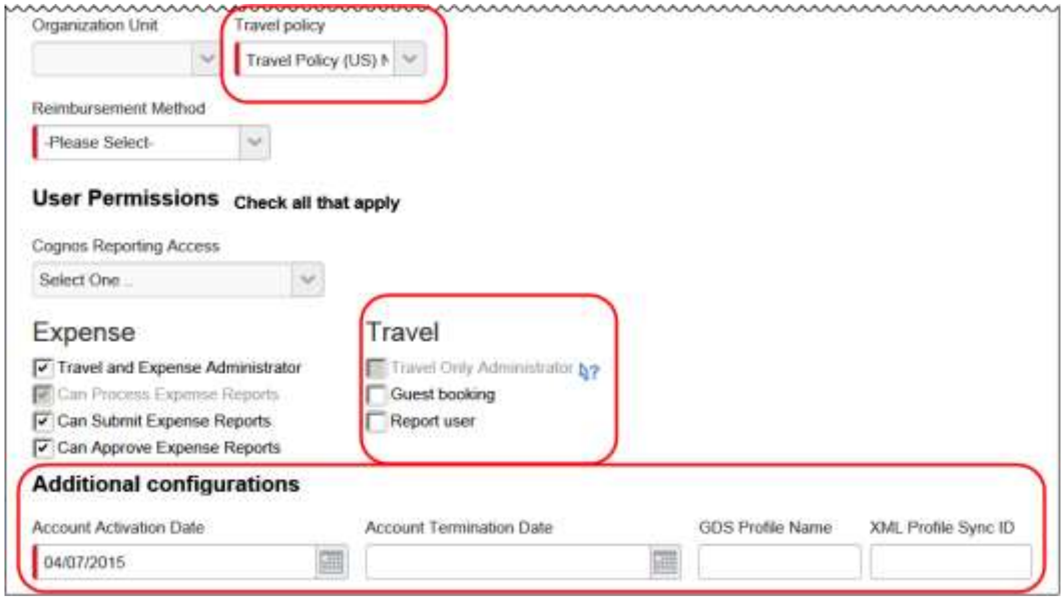
The **Create User** page appears.



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



5. For the ***Travel***-related fields, 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.
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

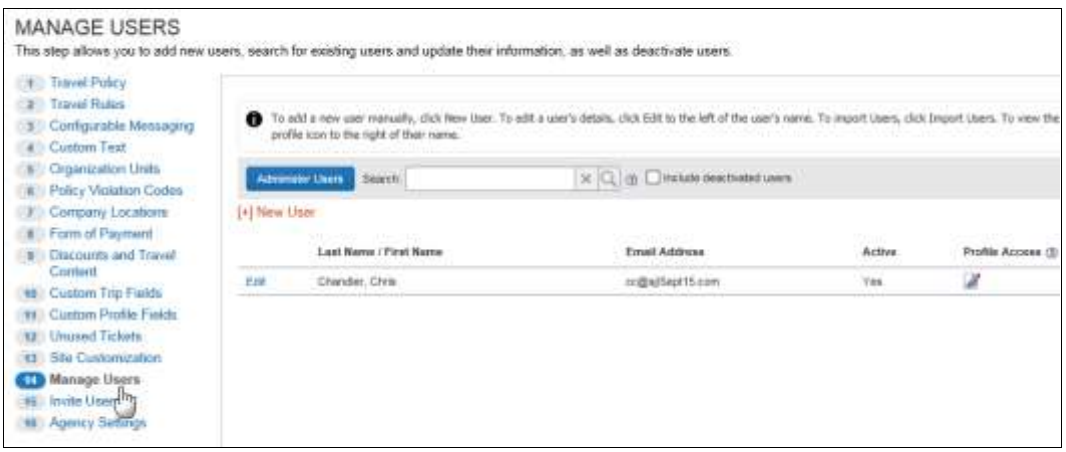
Field	Description/Action
XML Profile Sync ID	Either: • If the field is already populated, make no changes; the field has been configured to provide either the Login ID or the Employee ID. • If the field is blank, enter the identifier as defined by your company or TMC.

6. Click **Save**.

Locate an Existing User – Travel WITH or WITHOUT Expense

To locate 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.

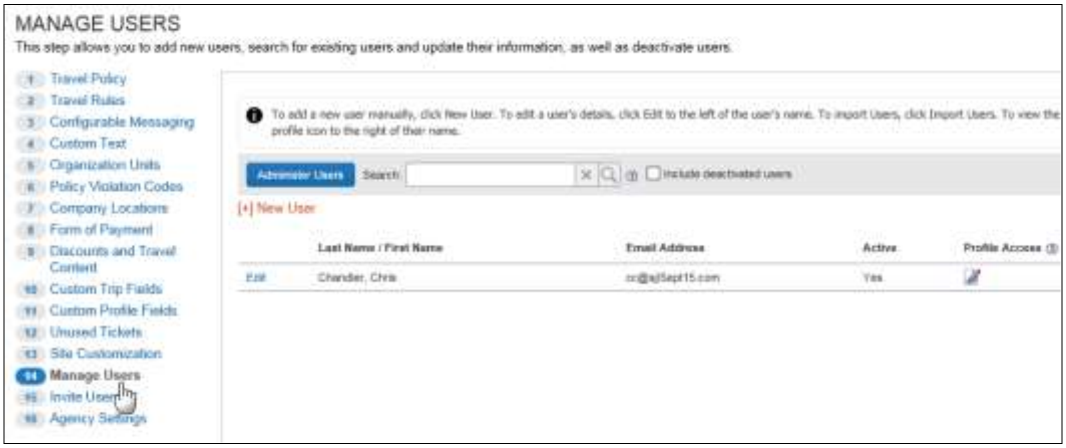
2. Use the **Search** field to type in a name or any part of a name. Entries in this field are not case-sensitive. Check the box to include inactive users if you want to search all profiles. Leaving this unchecked will limit the search to active profiles.

3. 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.

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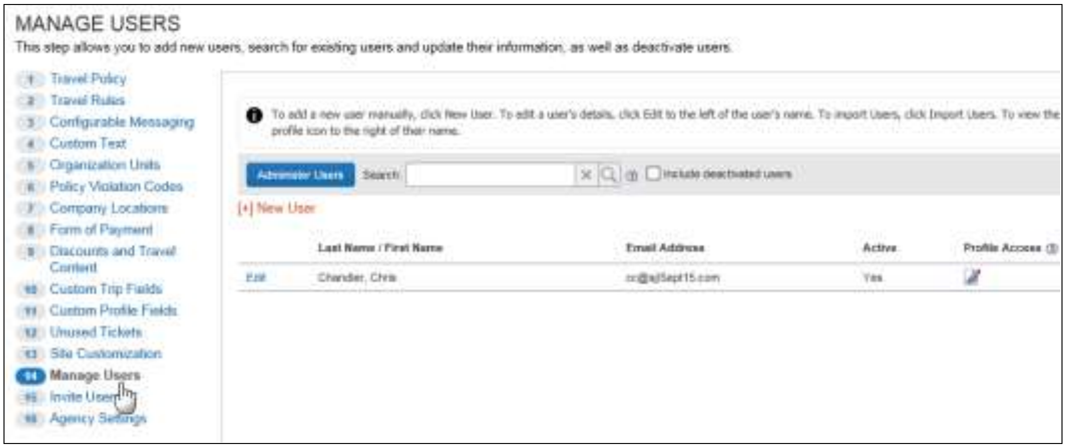
2. Click **Edit** for the desired user. The **User Detail** window appears.
3. Make the desired changes as defined in *Adding a New User* in this guide.

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*.

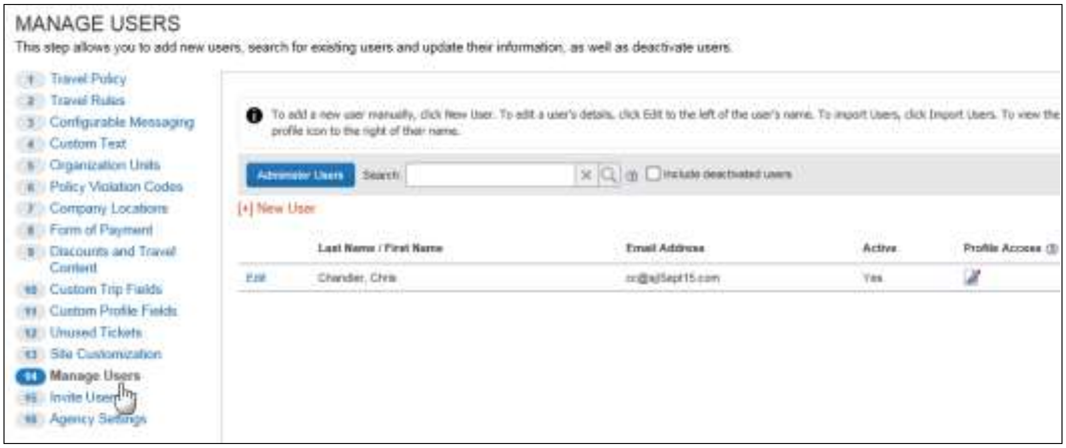
- *Modify* user information via import using the **Manage Users** step in the Travel Setup Wizard.

Import Users – Travel WITHOUT Expense

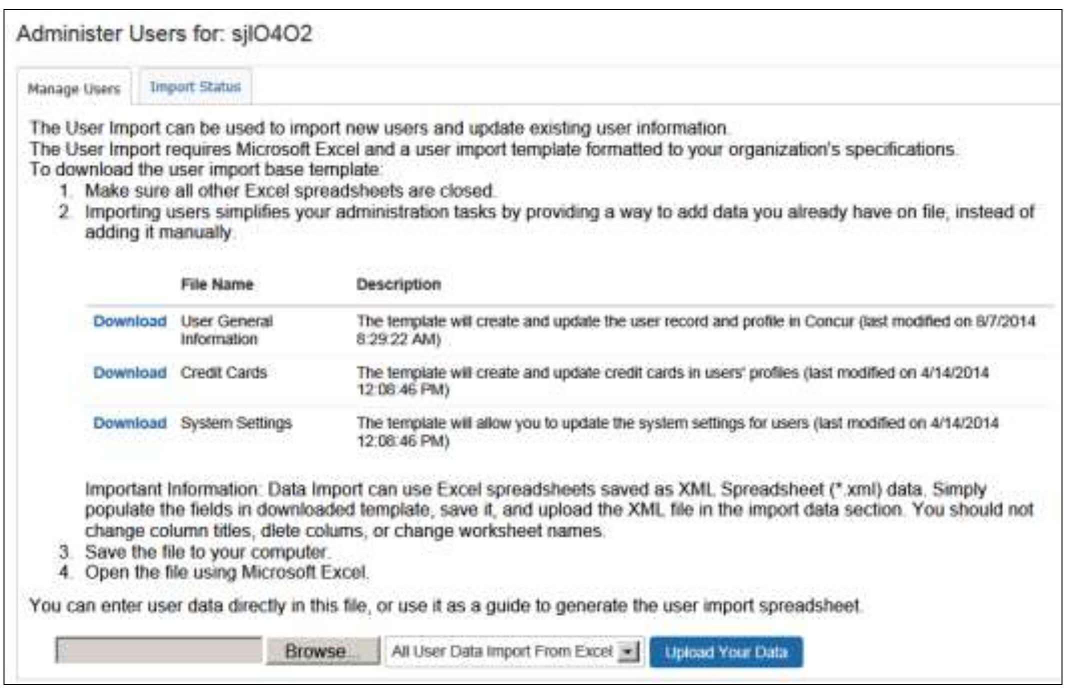
If you are implementing Travel ***without*** Expense, you can import new users and modify existing user information via import in the Travel Setup Wizard.

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.

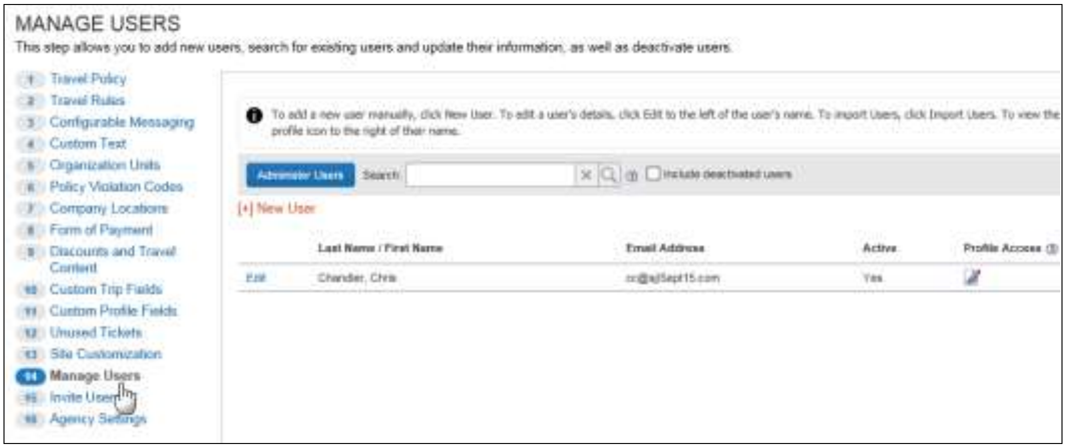
6. Click **Browse**/**Choose File** (depending on the browser) to locate the updated file on your computer.

7. Once added, click the **Upload Your Data** button.

View Import Status – Travel WITH or WITHOUT Expense

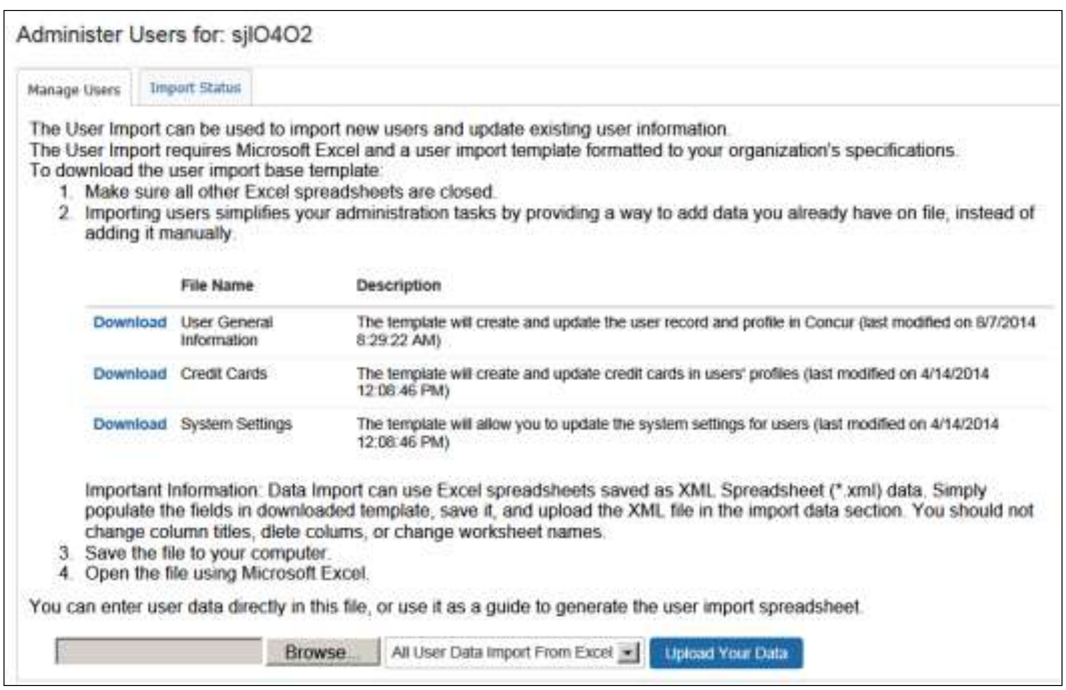
To view the import status:

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.

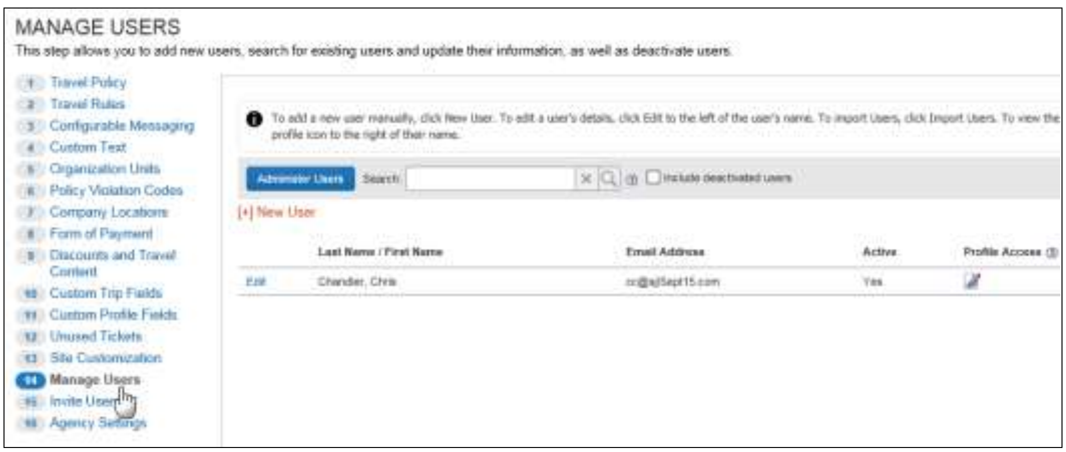


3. Click the **Import Status** tab to view the status of the last 10 imports**.**
4. To see the details on the particular import, click the icon in the **Details** column.
   - Details will show below with time/date stamps.
   - A link will also be provided to download the original import file, with 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

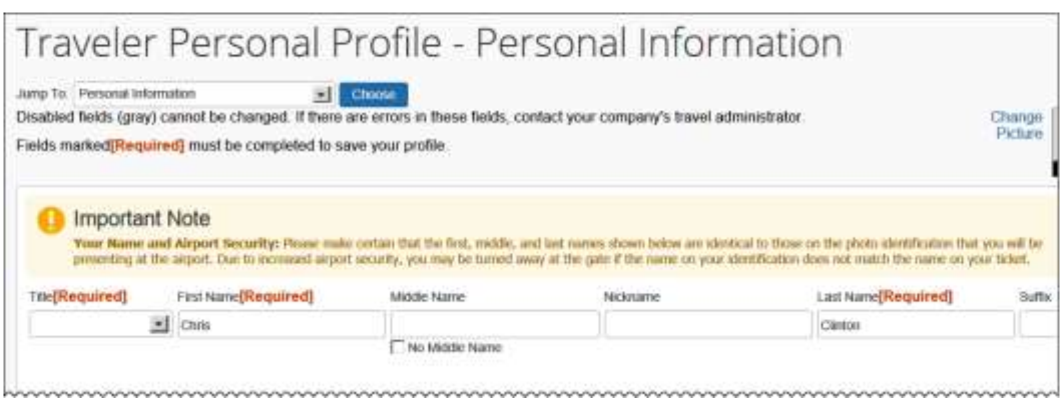
To access user profiles:

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.



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.

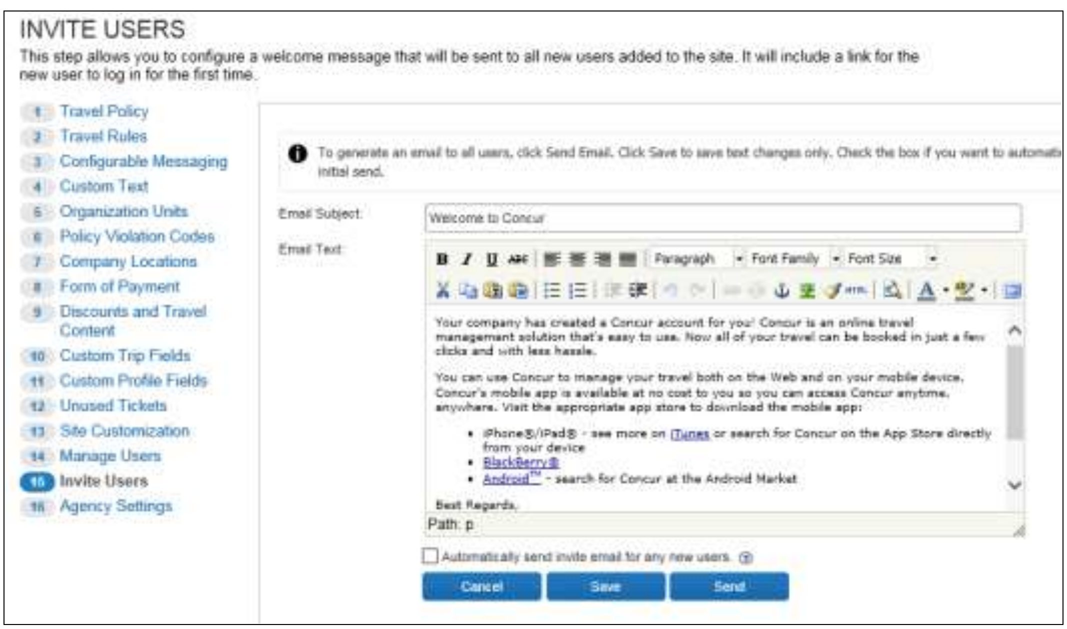
Invite Users does the following:

- 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**.



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:

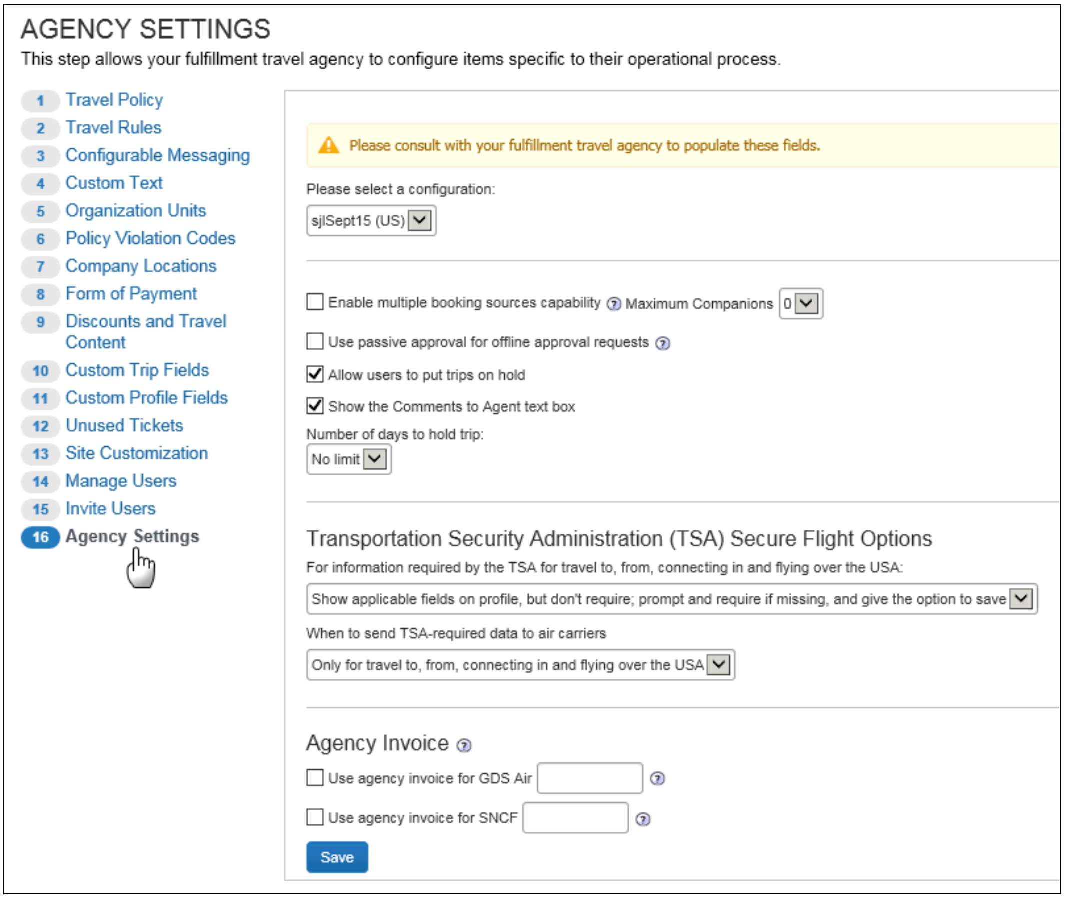
- General agency settings, such as trip-on-hold, multiple booking sources, companions, etc.
- Transportation Security Administration (TSA) settings
- Agency invoice options

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**.



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

Option	Description/Action
Enable multiple booking sources capability	Select this check box to allow users to combine GDS in the same PNR with: Air Canada, Southwest, Travelfusion (web fares), Cleartrip, and Amtrak. **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.

Option	Description/Action
Maximum Companions	Select the number of companions that will be allowed in the same trip, treated as a group, in one reservation (PNR). 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. **IMPORTANT:** This feature should be enabled ***only*** by the fulfillment travel agency or with their permission. There may be challenges with supporting this feature from a TMC perspective. **NOTES:** • 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	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.
Allow users to put trips on hold	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. 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.
Show the Comment to Agent text box	Select to allow the **Comments to Agent** field that appears on the **Trip Details** page. **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.
Number of days to hold trip	Select the number of days a user can place a trip on hold.

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

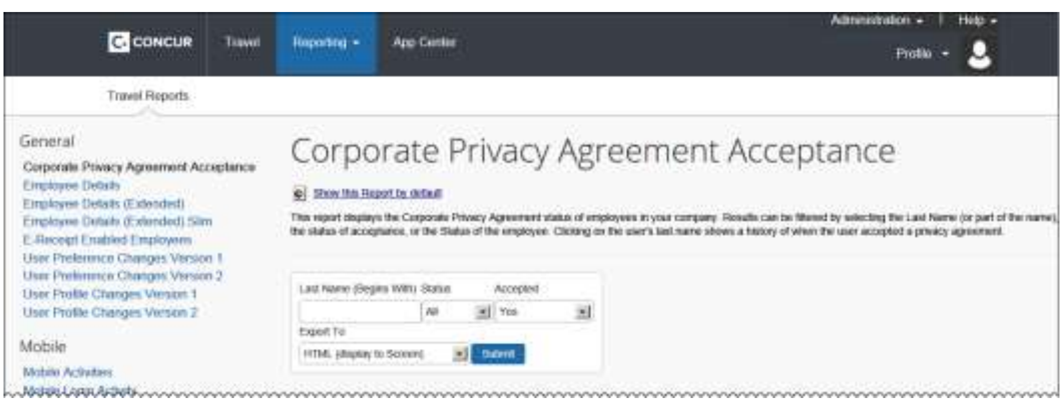
Use the **Reporting** tab (main menu) to run travel reports.

> 📖 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

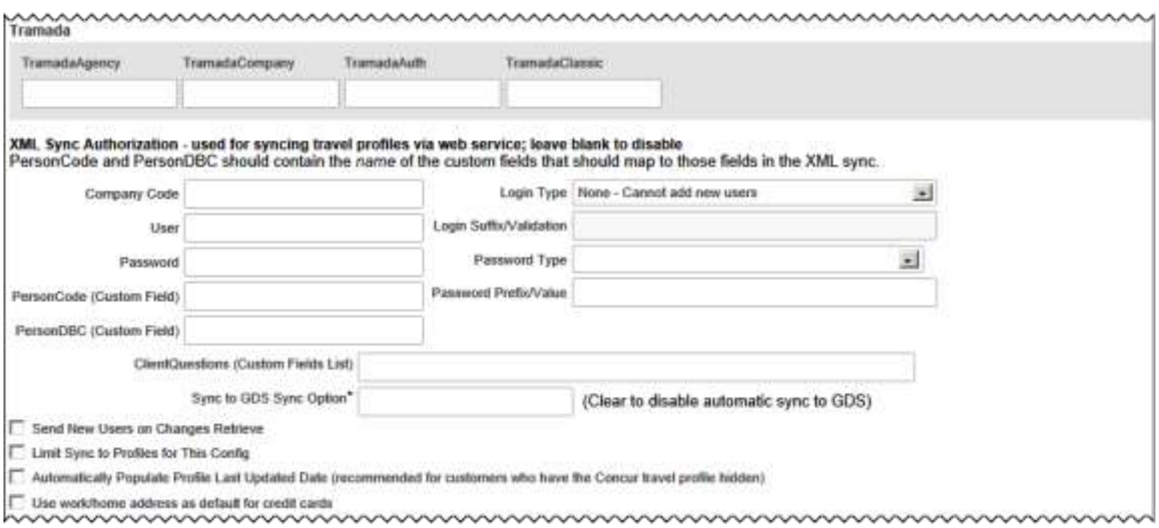
Overview

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.

Amadeus only:


Pricing Options
None defined for this GDS.
Worldspan Only: Default Air Ticketing Line Format
TAW
/14
/today
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
Apply changes
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 BAR 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

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 *Sabre Profiles Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Discounts and Travel Content* 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 *Trip Cancel and Voids Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Anytime* option appears to users 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 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 *Green Support Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *View More Air Fares Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Government Features Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Flex-Faring Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *hotel search results* 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 *Discounts and Travel Content* 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 *Flex-Faring Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* in the appendix of this guide.
Hotel Sort Default	Company Policy

Travel Configuration Setting	Default Value
Rail Connectors	
Rail Connectors	Refer to *Discounts and Travel Content* in this guide for configuration information. If there are default settings, they are listed there.
Ground Reservation Options	
GGA Limos/Ground Connectors	Refer to *Discounts and Travel Content* 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 *Park 'N Fly Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *American Airlines AAirpass Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Discounts and Travel Content* 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 *Clone/ Share Trip Travel Service Guide* – to locate, see *Find the Travel Service Guides & Fact Sheets* 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 *Custom Trip Fields* and *Custom Profile Fields* 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 *Galileo Prod* 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.

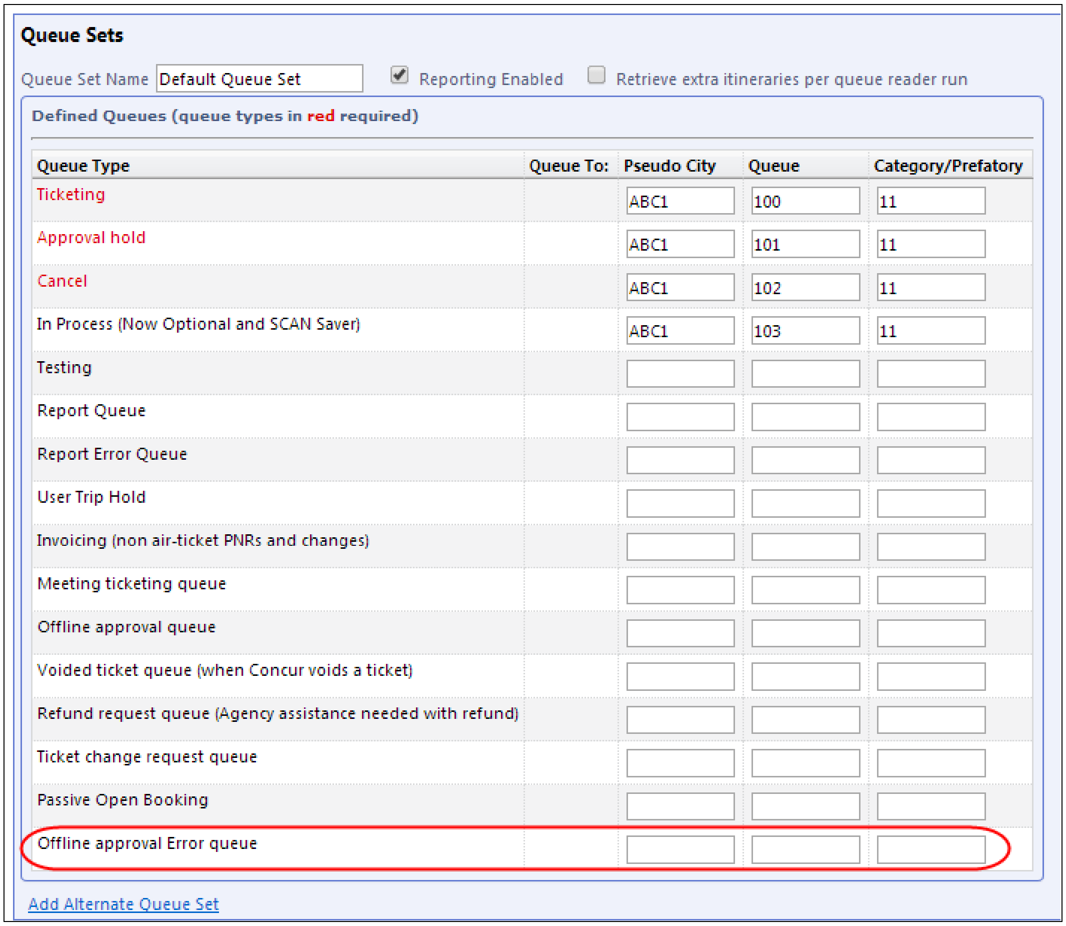
Refer to the *Hotel Previous Stay History Fact Sheet*.

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**.



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.

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*.