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QuickStart Guide

Concur® Travel

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Concur Travel QuickStart Guide Table of Contents

Proprietary Statement 2

Concur Travel QuickStart Table of Contents 3

Welcome to Concur Travel 5

Section 1: Log on to Concur 5

Section 2: Explore the Home Page 6

Section 3: Update Your Travel Profile 8

Step 1: Change Your Password 8

Step 2: Change your Time Zone, Date Format, or Language 9

Step 3: Update Your Personal Information 10

Step 4: Set Up a Travel Arranger or Assistant 11

Section 4: Make a Travel Reservation 12

Step 1: Enter search conditions in the Travel Wizard 13

Step 2-A: Select a Flight (Search by Price) 17

Step 2-B: Select a Flight (Search by Schedule) 21

Step 3: Select a Car 22

Step 4: Select a Hotel 24

Step 5: Complete the Reservation 26

Section 5: Single Type Reservation 28

Step 1: Book a Car only 28

Step 2: Book a Hotel only 30

Step 3: Book a limo only 31

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Step 4: Book a Rail (Amtrak) only 32

Section 6: Add a Flight, Car Rental, or Hotel Reservation 35

Section 7: Cancel or Change a Flight, Car Rental, or Hotel Reservation 37

Section 8: Travel Action Buttons and Icons 39

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Welcome to Concur Travel

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

Concur's Travel feature enables you to:

- Search the same vendor inventory that your travel agency uses as well as private rates for your corporation.
- Find, coordinate, and reserve your airline, rental car, hotel, rail for your business travel.
- Comply with your company's travel policy when booking your travel.

Section 1: Log on to Concur

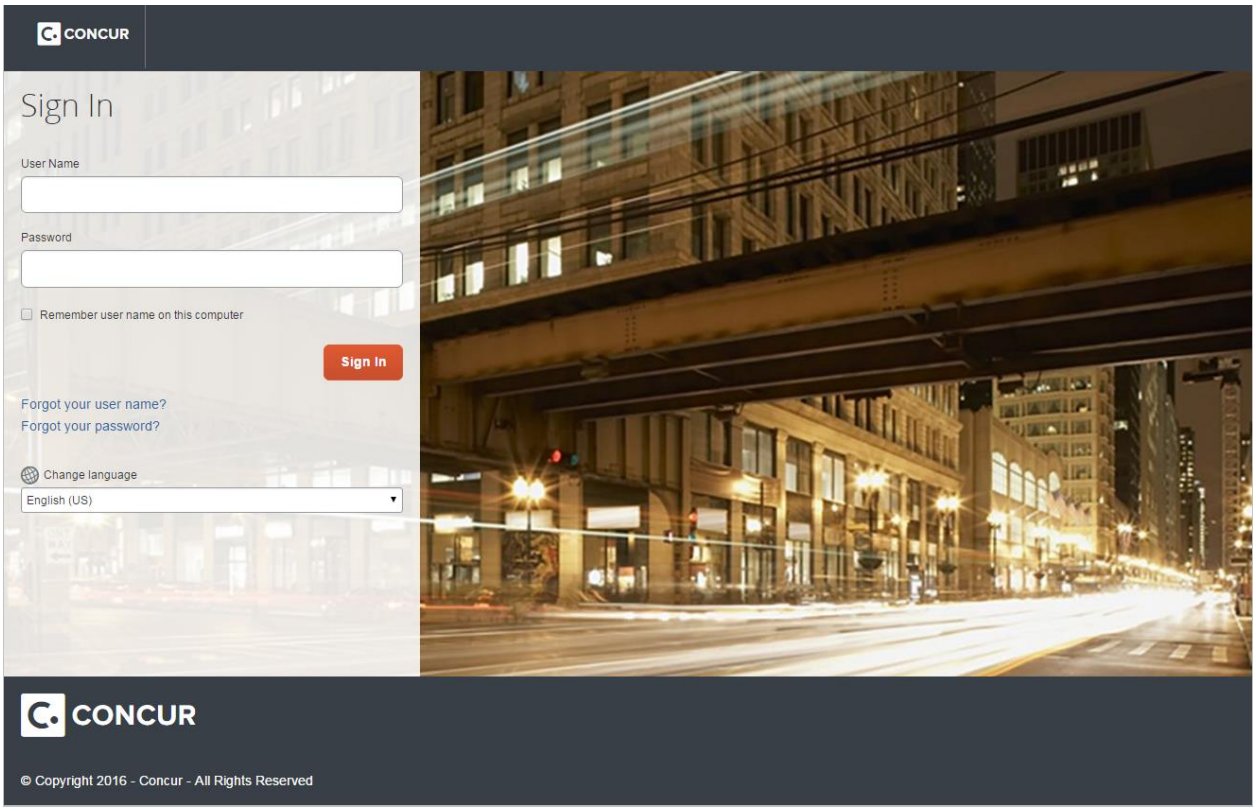
How to…

1. Access **www.concursolutions.com**
2. Log on to Concur with your ID and Password.

Additional Information

Your ID (User Name) usually is your e-mail address

Your password is case sensitive.



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Section 2: Explore the Home Page

The **Home** page lets you overview the tasks awaiting you and lets you find all the information you need to book travel. If your company has Concur Expense your home page includes features of both Travel and Expense.

How to…	Additional Information
View the Task Bar. (1)	Any pending tasks, such as approval requests, expenses to be submitted, upcoming trips etc. are displayed here.
Use the Trip Search section.(2)	This section provides the tools you need to book a trip with any or all of these: flight, rail, car and hotel.
Explore the Alerts section.(3)	This section reminds you of your passport, visa, credit card expiration dates if you enter this information in your profile. It also reminds you of extra features you can add to your Concur profile, such as e-receipts.
Explore the Company Notes and My Trips.(4)	Company Notes shows a message from your company or JTB USA. My Trips section lists your upcoming trips.
Explore the Policy.(5)	This section shows your company travel policy.

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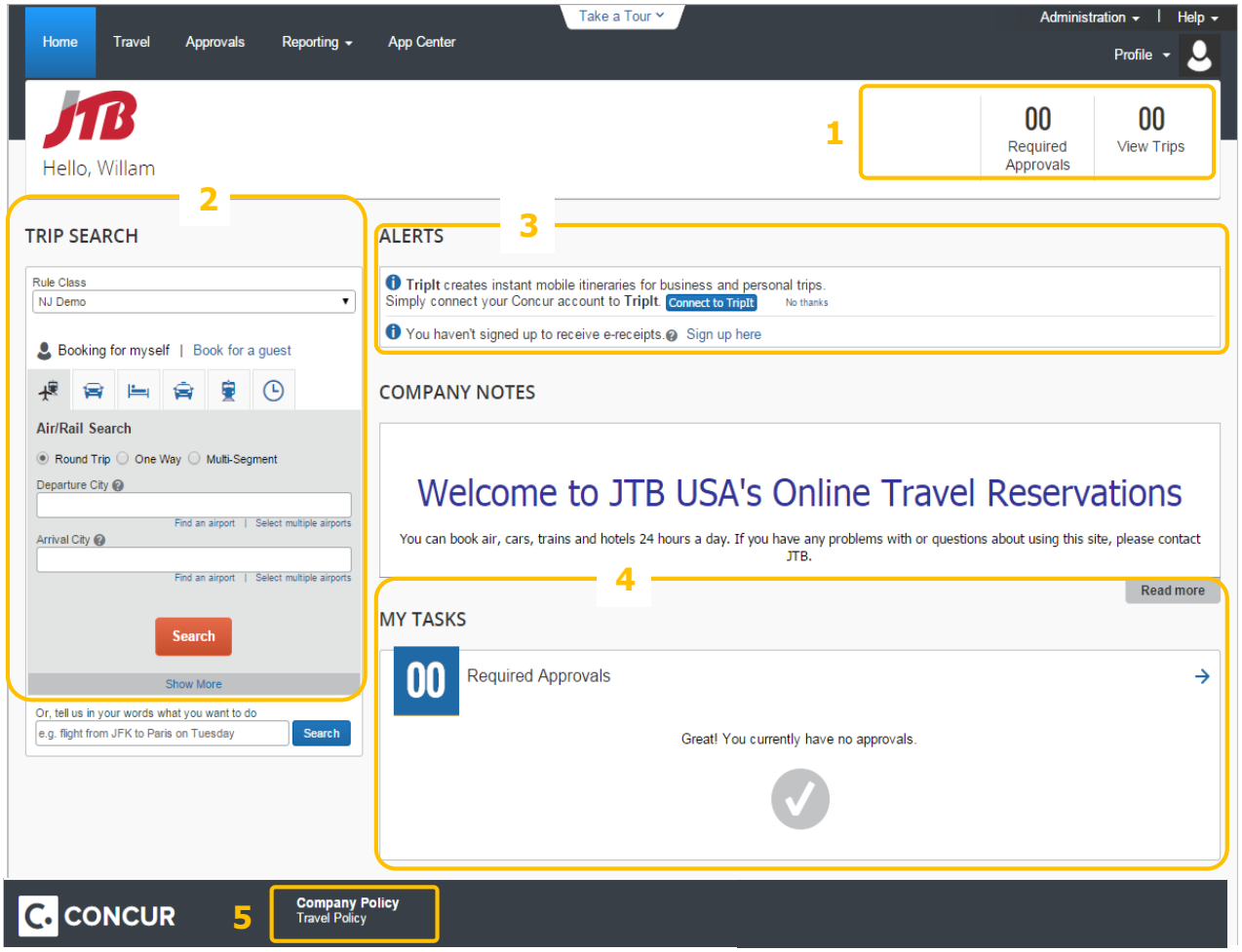

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Section 3: Update Your Travel Profile

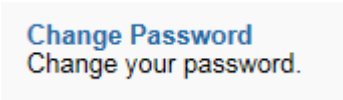
Before you use Concur for the first time, update your profile. You must save your profile before you first attempt to book a trip.

If you are a travel arranger and need to change another traveler's profile, first start an admin session by clicking on **Profile** and selecting or typing the name of the traveler under **Administer for Another user**. When the user name comes up, click **Apply**, then follow the steps 2 to 4 below.

Step 1: Change Your Password

You will be able to change your password on the Profile tab.

How to…	Additional Information
1. On the **Home** or **Travel** page, click on **Profile** in the top right hand corner of the page.	
2. Click **Profile Settings**	
3. Click **Change Password**	To change your password, you need to know your old or temporary password.
4. In the **Old Password** field, enter your current (temporary) password	
5. In the **New Password** field, enter your new password.	If you forgot your password you can change your password on the login page. Enter your login ID and click **Forgot your Password?** under the Login button.
6. Verify your new password by re-entering it in the **Re-enter Password** field.	
7. Enter a word or phrase in the **Password Hint** field to act as a reminder if you forget your password.	
8. Click **Save**.	



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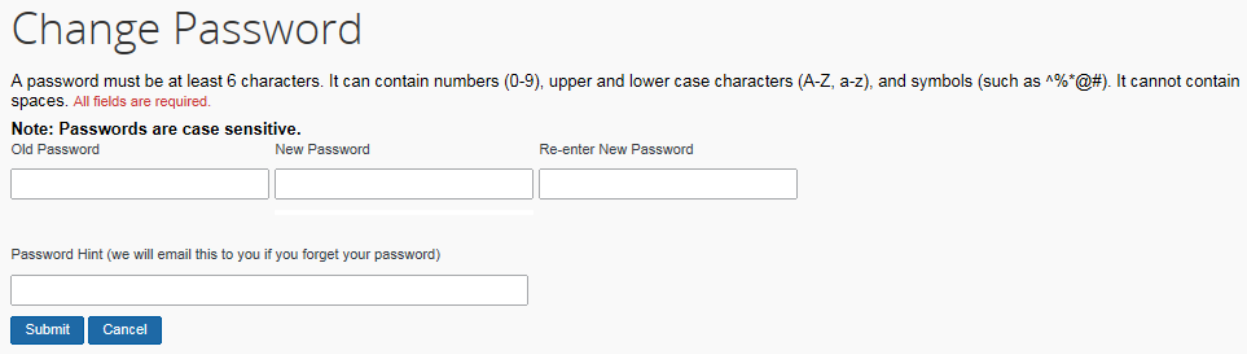


Step 2: Change your Time Zone, Date Format, or Language

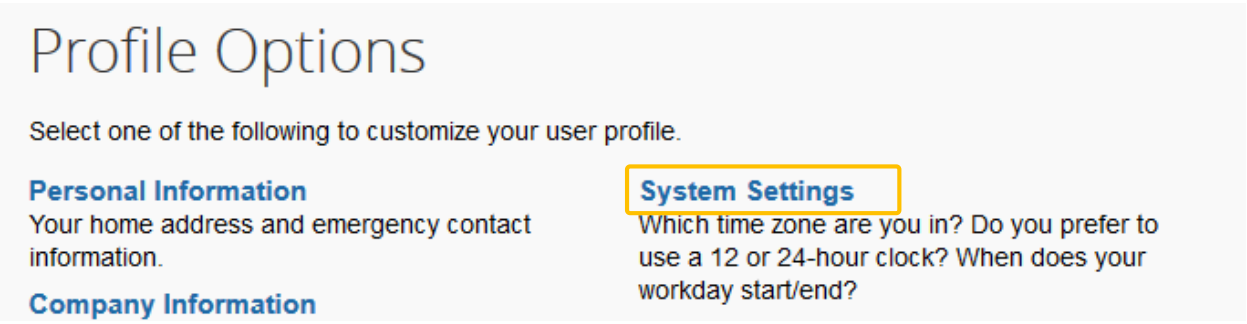
How to…

1. On the **Home** or **Travel** page, click on **Profile** in the top right hand corner of the page.
2. Click **Profile Settings**
3. Click **System Settings**
4. On the **System Settings** page, update the appropriate information
5. Click **Save**.

Additional Information

You can change the system and regional settings (number, currency, date, and time format). You can also select another default language to use Concur in.

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



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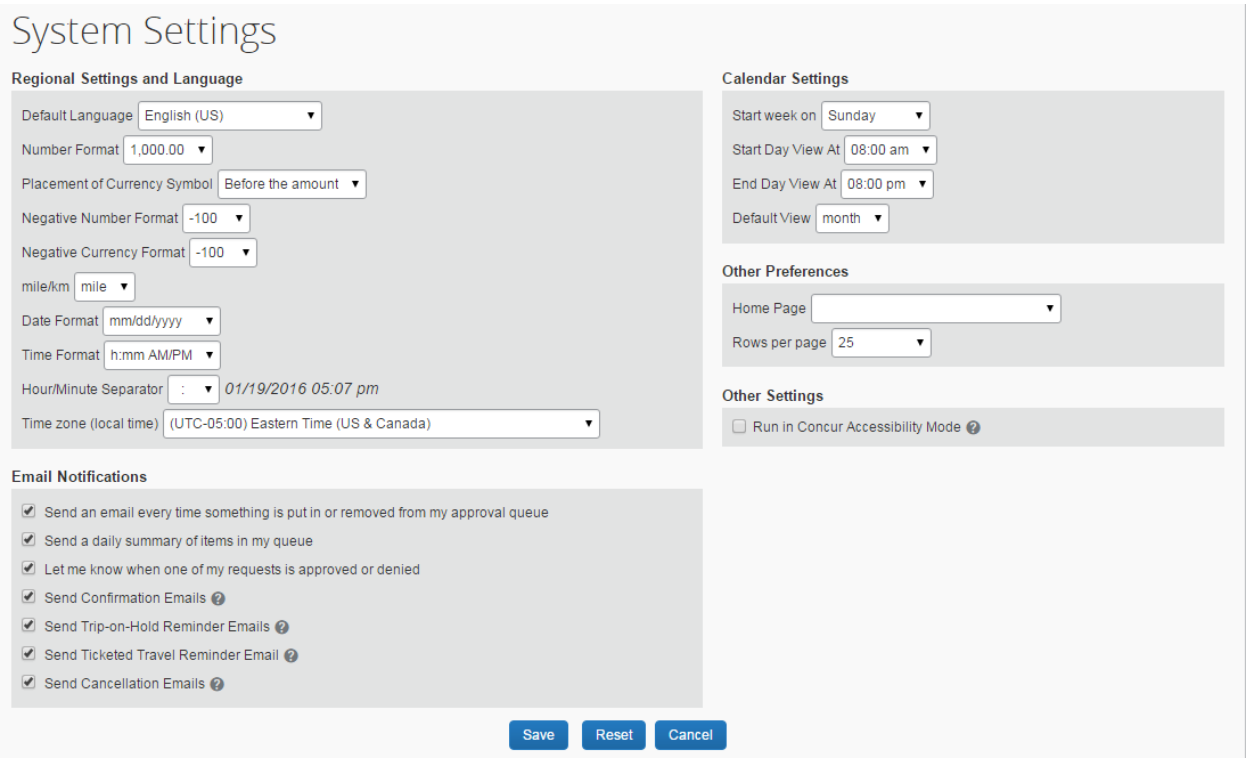

Step 3: Update Your Personal Information

How to…

1. On the **Home** or **Travel** page, click on **Profile** in the top right hand corner of the page.
2. Click **Profile Settings**
3. Click **Personal Information**
3. On the **My Profile** page, update the appropriate information

   Complete these sections of your travel profile:
   - Middle Name
   - Airport Security (Gender, Date of Birth)
   - Work Address / Phone Number
   - Travel Preferences
   - Credit Card info for hotel reservations and/or air reservation according to your company form of payment policy.

Additional Information

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

Verify that the first and last name fields match the ID used at the airport. You cannot edit these fields. If necessary contact JTB USA to make changes.

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

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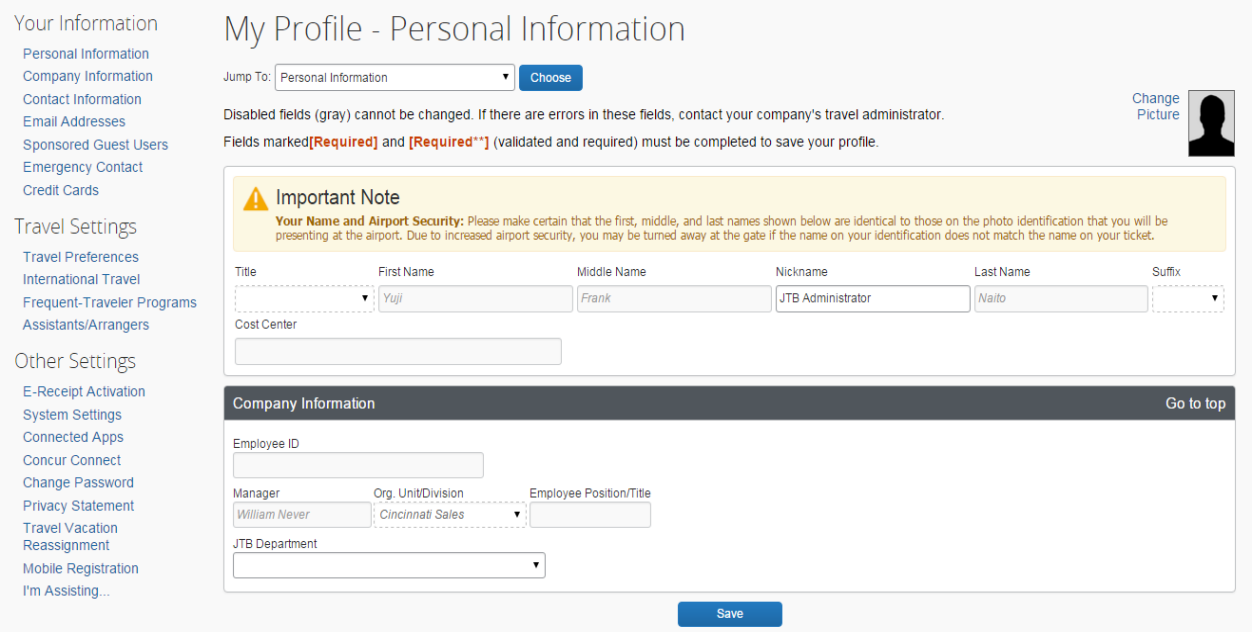
4. Click **Save**.

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



Step 4: Set Up a Travel Arranger or Assistant

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

How to…

1. From the **My Profile page**, click the **Jump to** dropdown menu
2. In the dropdown menu, click **Assistants**
3. On the **Profile** dropdown menu, click **Personal Information**.
4. Click **Add an Assistant**.
5. Start typing in the **Assistant** search box.

Additional Information

Alternatively from the **Home** or **Travel** page, click on **Profile** in the top right corner of the page. Then click **Setup Travel Assistants**.

When searching start typing the first name, last name, nick name or email address of

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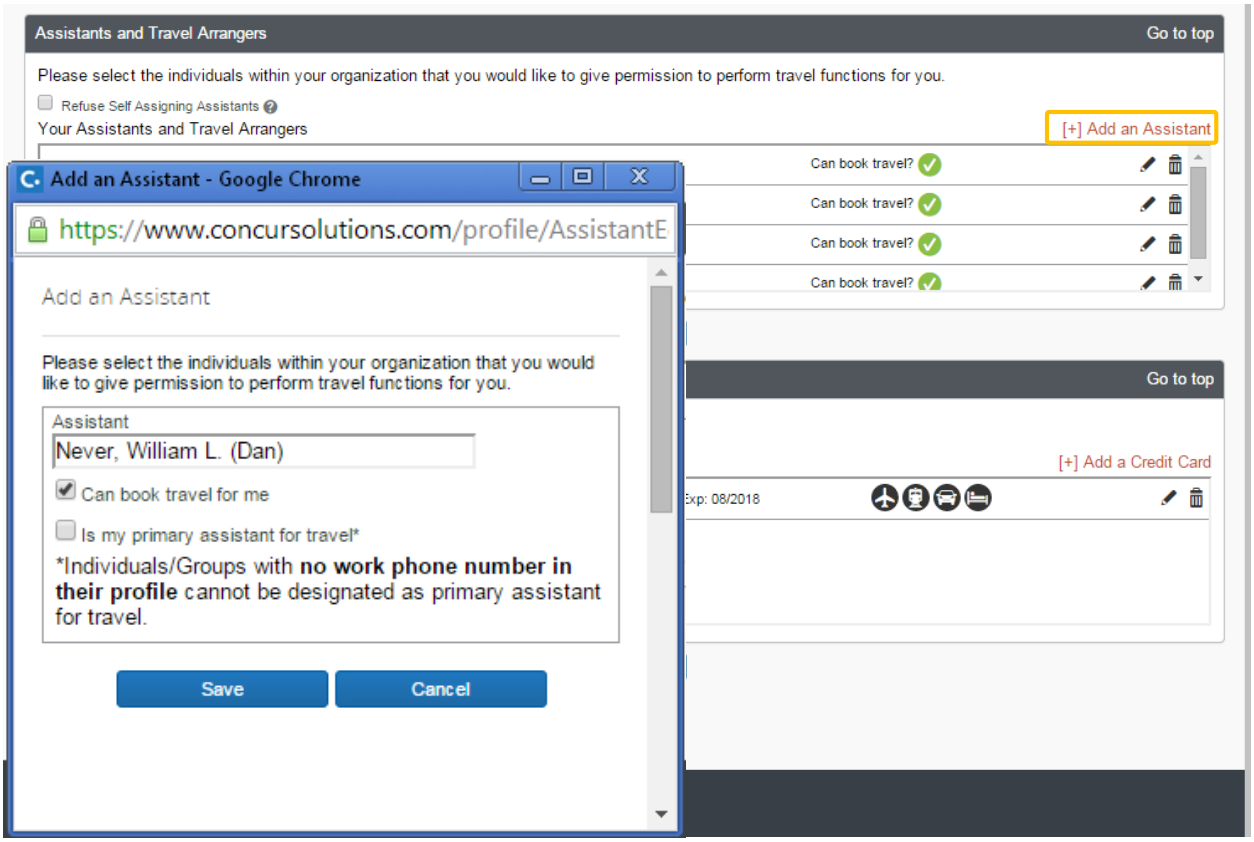
the person you are looking for. The **Assistant** dropdown list shows any individuals that match your search criteria.

6. Select the appropriate name from the dropdown list.

Important: Your assistant must have an existing Travel account before you can add him or her to your profile. Please contact JTB USA if your assistant needs a Concur login.

7. Select **Can book travel for me**.
8. Select **Is my primary assistant for travel**.
9. Click **Save**.

Use this option if you want to have this assistant included on emails from JTB USA (ticketed itinerary etc.) about <u>all</u> of your trips.



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Section 4: Make a Travel Reservation

Step 1: Enter search conditions in the Travel Wizard

How to…	Additional Information
1. On the **Travel** or **Home** page, click the tab with the **Air/rail** icon at the left side of the page.	If you would like to book a car, hotel, rail only, use the corresponding tabs. For more details, see page 28-34. You can search rail by using the Air/Rail tab, however if you would like to search by specific station name, use the Rail tab.
2. Select one of the following types of flight options: • Round Trip • One Way • Multi-Segment	
3. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. Start typing the name, airport name or airport code to find the city.	When you type a city, airport name, or airport code, Concur Travel will automatically search for a match. Concur will automatically do a search for all airports, if there is more than one major airport in a region. You can also make your own selections of airports by clicking **Select Multiple Airports**.
4. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. You can specify flights departure time and arrival time as well.	You can choose from **Morning**, **Afternoon**, **Evening, Anytime,** or select a specific hour. Concur Travel searches before and after the time you have specified in a range from 2 up to 12 hours.

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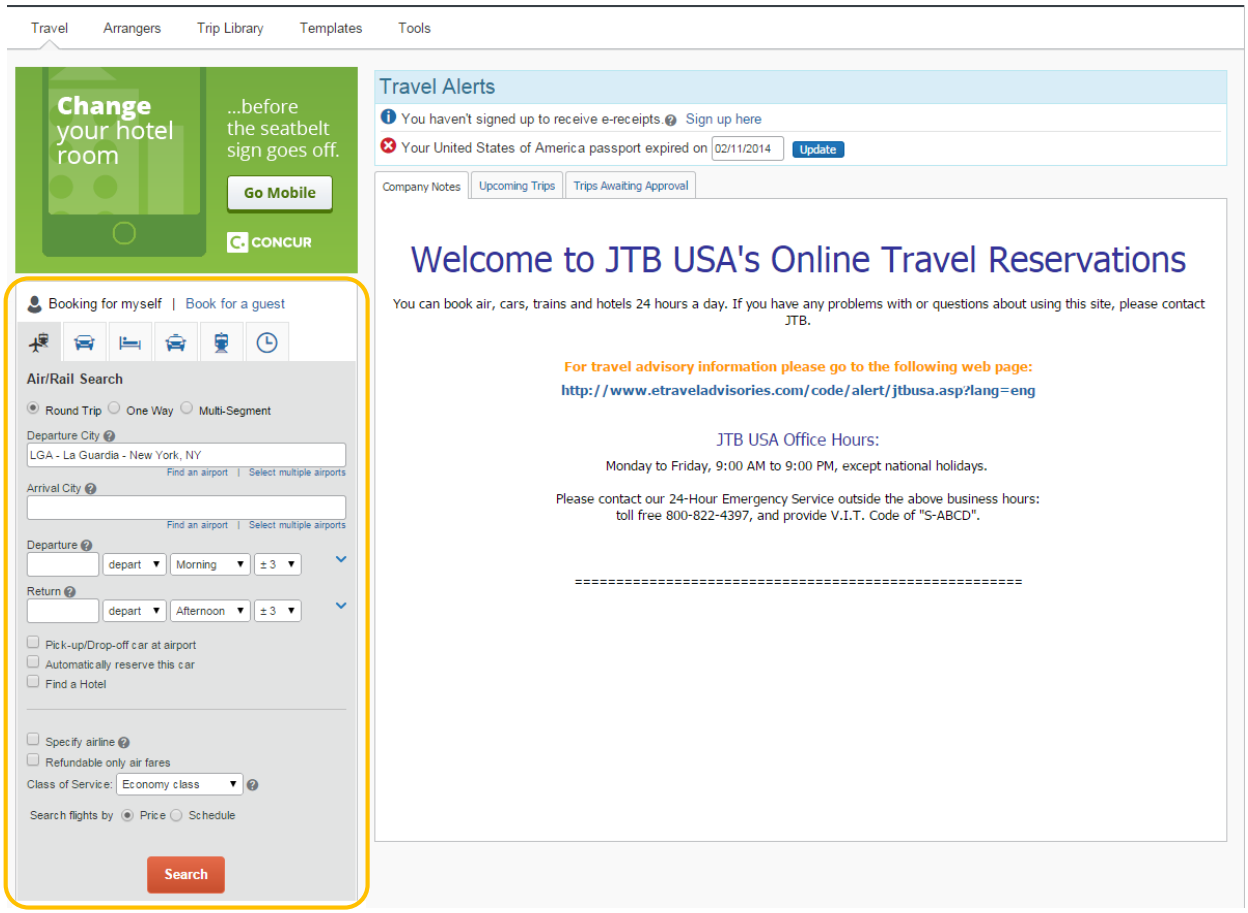

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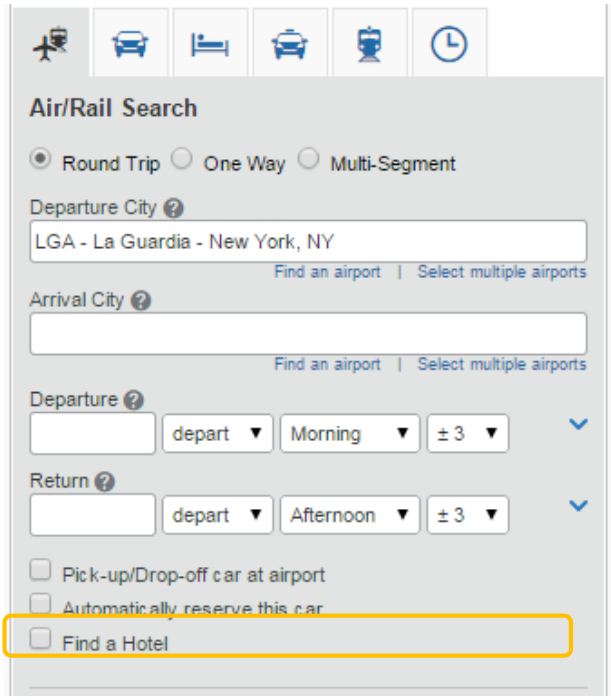
How to…

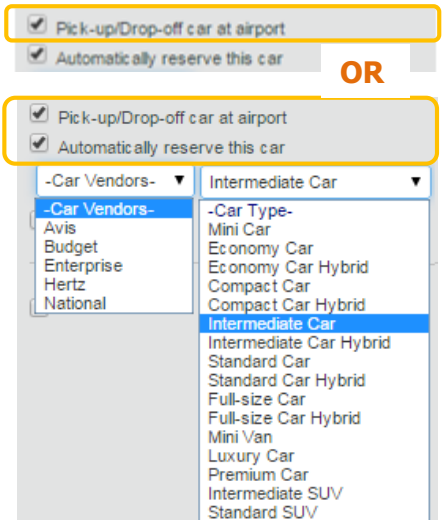
5. If you need a car, select the **Pick-up/Drop-off car at Airport** checkbox.



Additional Information

Depending on your company's configuration you may see the **Automatically reserve this car** checkbox. By checking this box and selecting a vendor and car type, a car is automatically added to your reservation, skipping the **Car Results** page.

If you need an off-airport car or have other special requests, you need to make these requests on the **Car Results** page.



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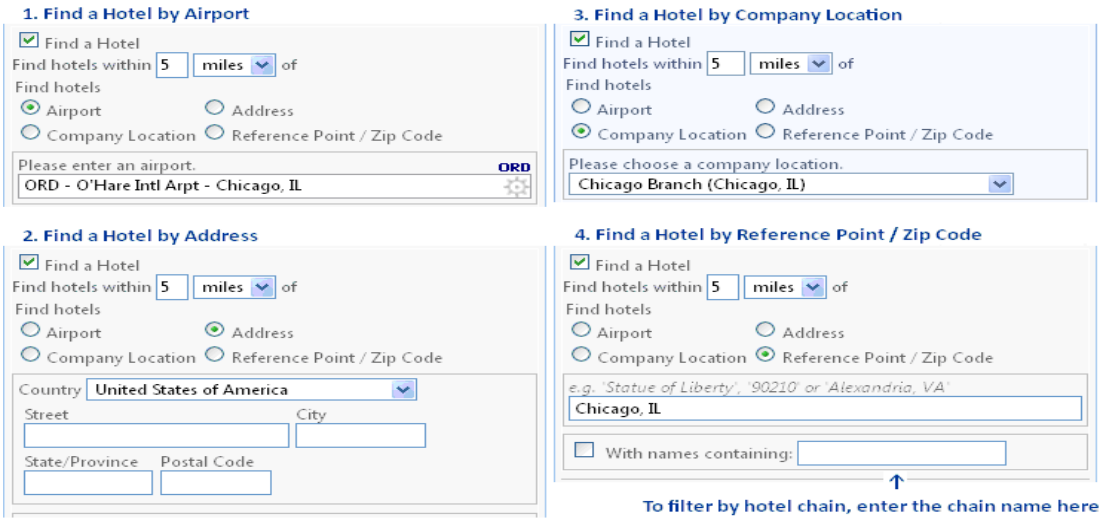
How to…

6. If you need a hotel, select the **Find a Hotel** checkbox.
   If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step.



Additional Information

You can choose to search for the hotel by:

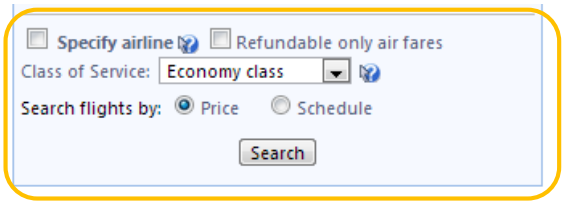
- Airport
- Address
- Company Location
- Reference Point / Zip Code

How to…

7. To search only fully refundable fares, select the **Refundable only air fares** checkbox.

   To bring up more search results of a specific airline and to bring up results for the airline first, select **Specify Airline** and choose a carrier.

8. Depending on your company's configuration you may see a **Class of Service** dropdown to select classes other than Economy
9. Select **Search flights by Price** or **Schedule**.
10. Click **Search**.



Additional Information

Results for other classes of service will show up or may be hidden depending on your company's Travel Policy.

Search flight by Price will show roundtrips as a combination of an outbound and return flight and will price out your flights.
Search flight by Schedule will show outbound and return flights on two different tabs with an estimated price, allowing you to make your own combination of outbound and return flights. After you have made your selection, click **Price these options.**

You can easily switch between these search modes by clicking **Shop By Fares**

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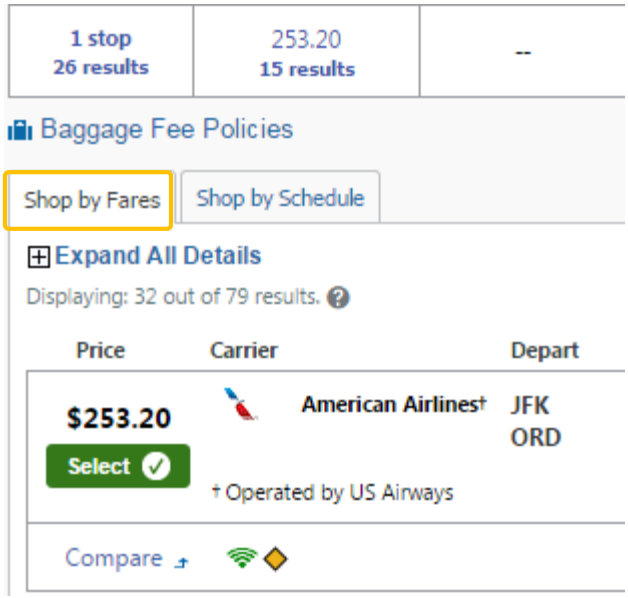
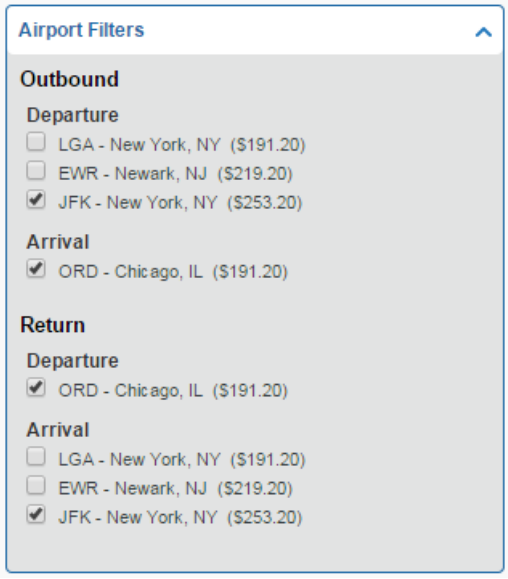
How to…	Additional Information
	or **Shop By Schedule** from the Search results page.

Step 2-A: Select a Flight (Search by Price)

When selecting a flight in the Shop by Fares/Price mode, follow the steps below.

How to…	Additional Information
1. You are on the search result page looking at the **Shop by Fares** tab. Click on **Show details** for the flight you are interested in and check the flight details.	If you want to narrow down or broaden the search results you are viewing, you can use the **Airport Filters**, **Price**, **Outbound** and **Return** sliders on the left. You can adjust your search conditions via **Change Flight Search.**





From the flight details click **Fare Rules** if you want to see fare information such as conditions for refunds, penalties for ticket changes etc.

Concur Travel automatically selects a corresponding frequent flier program from the profile, if available. If needed, add or choose a different frequent flier program to the flight under **Frequent Traveler Programs**

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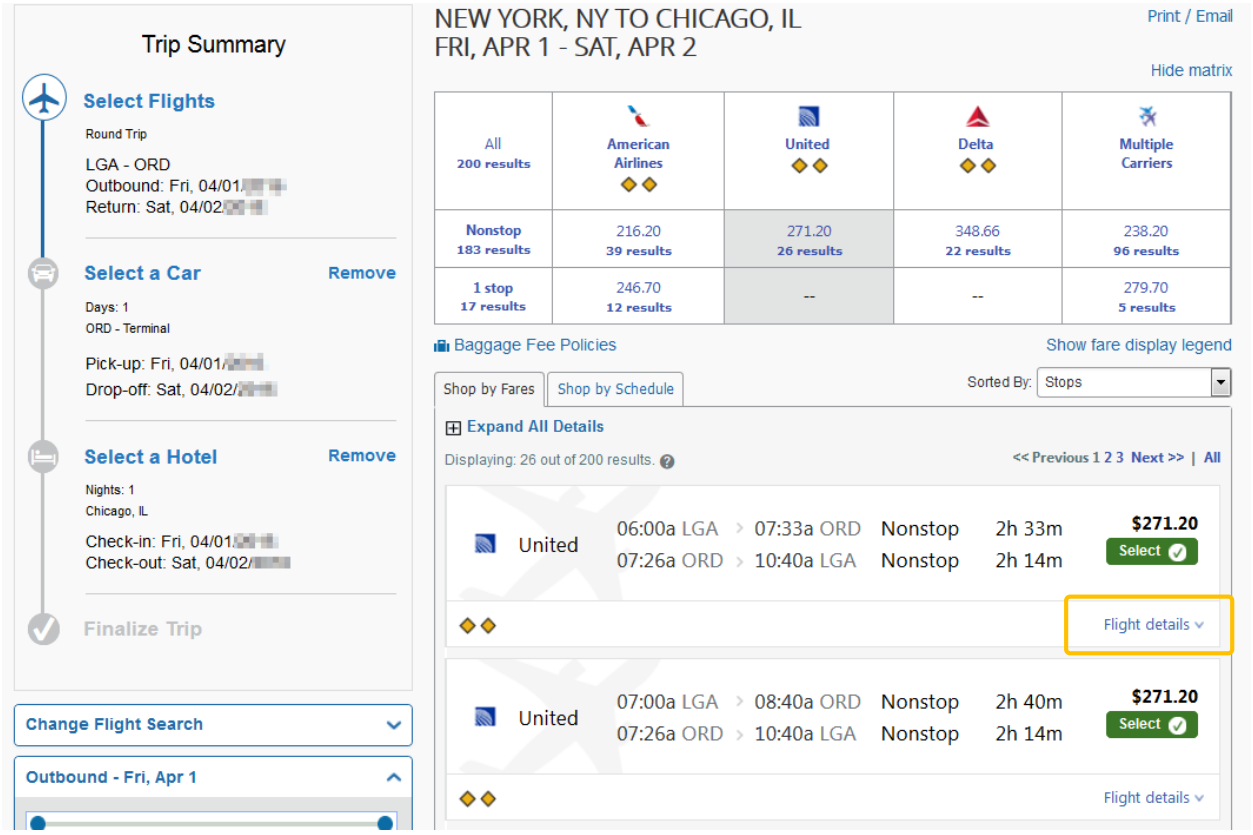

How to…

2. To select a seat, click the **View Seatmap icon** next to the flight.

3. Select any light blue (unoccupied) seat or enter a seat number in the **Seat Selection** box.

4. Click **Select Seat**.

Additional Information

If you do not select a seat Concur will assign a seat based on the **Travel Preferences** section in your profile.

A legend is at bottom of the seat map box, showing which seats are available, occupied, or considered preferential.
Select preferential seats (highlighted in blue) if you have preferred status on the selected airline. If you select a preferential seat, your seat request will only be honored if your frequent flyer number is stored in your Travel profile.

Some seats are marked handicapped and can only be selected by a travel agent. If

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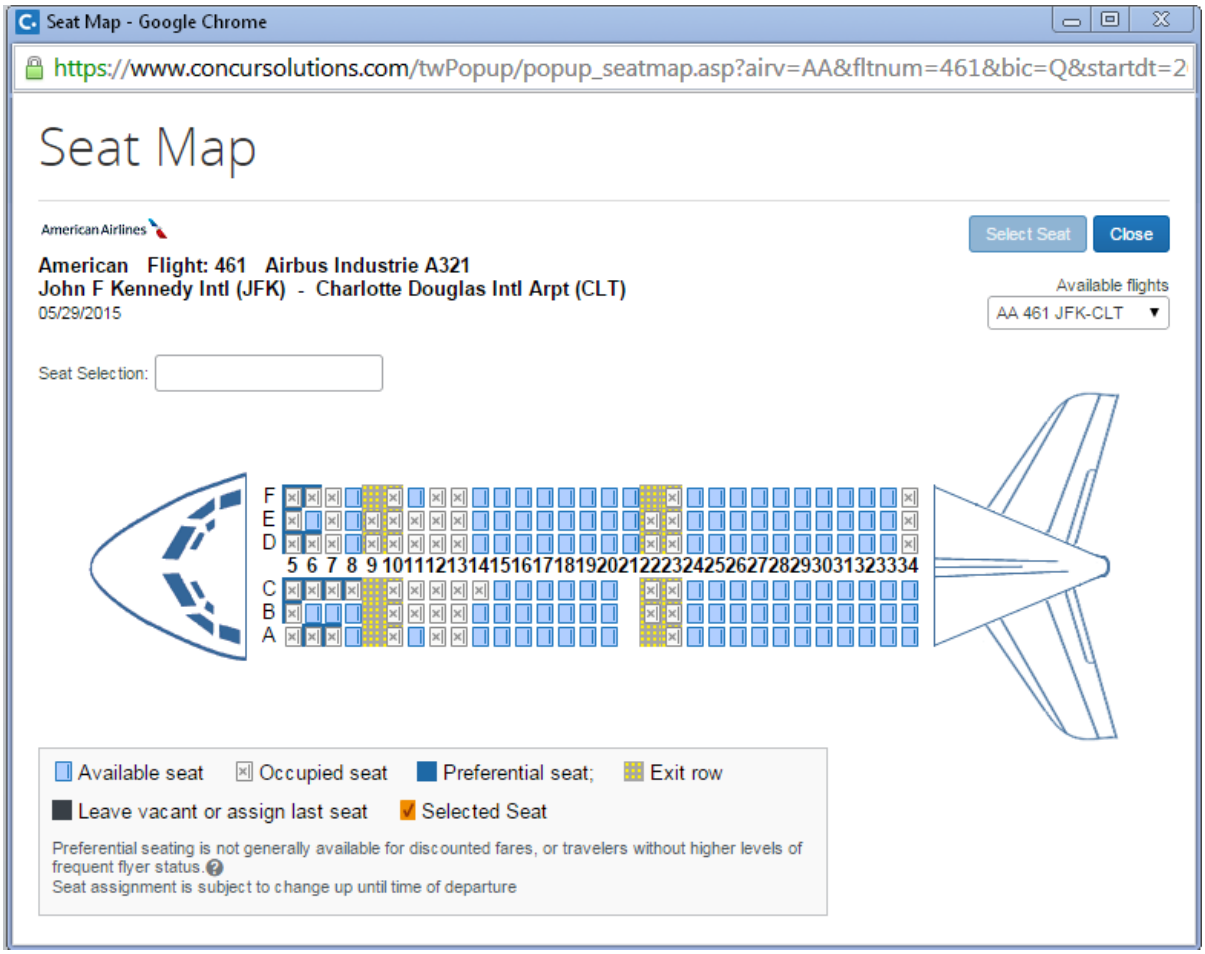
you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.

5. Once you have made your seat selection, click **Close**.
6. Repeat steps 1 to 5 for the remaining flights.

For connecting flights choosing the next flight from the **Available Flights** drop down box to view its seat map.



How to…

7. Click **Select**.

Additional Information

Policy information appears next to the **Select** button. The **Select** buttons are color coded as:

- A *green* **Select** button indicates the fare is within policy.
- A *yellow* **Select** button indicates the fare is outside of policy. If you select this fare, you must enter additional information which may be sent to your manager, depending on your company's settings.

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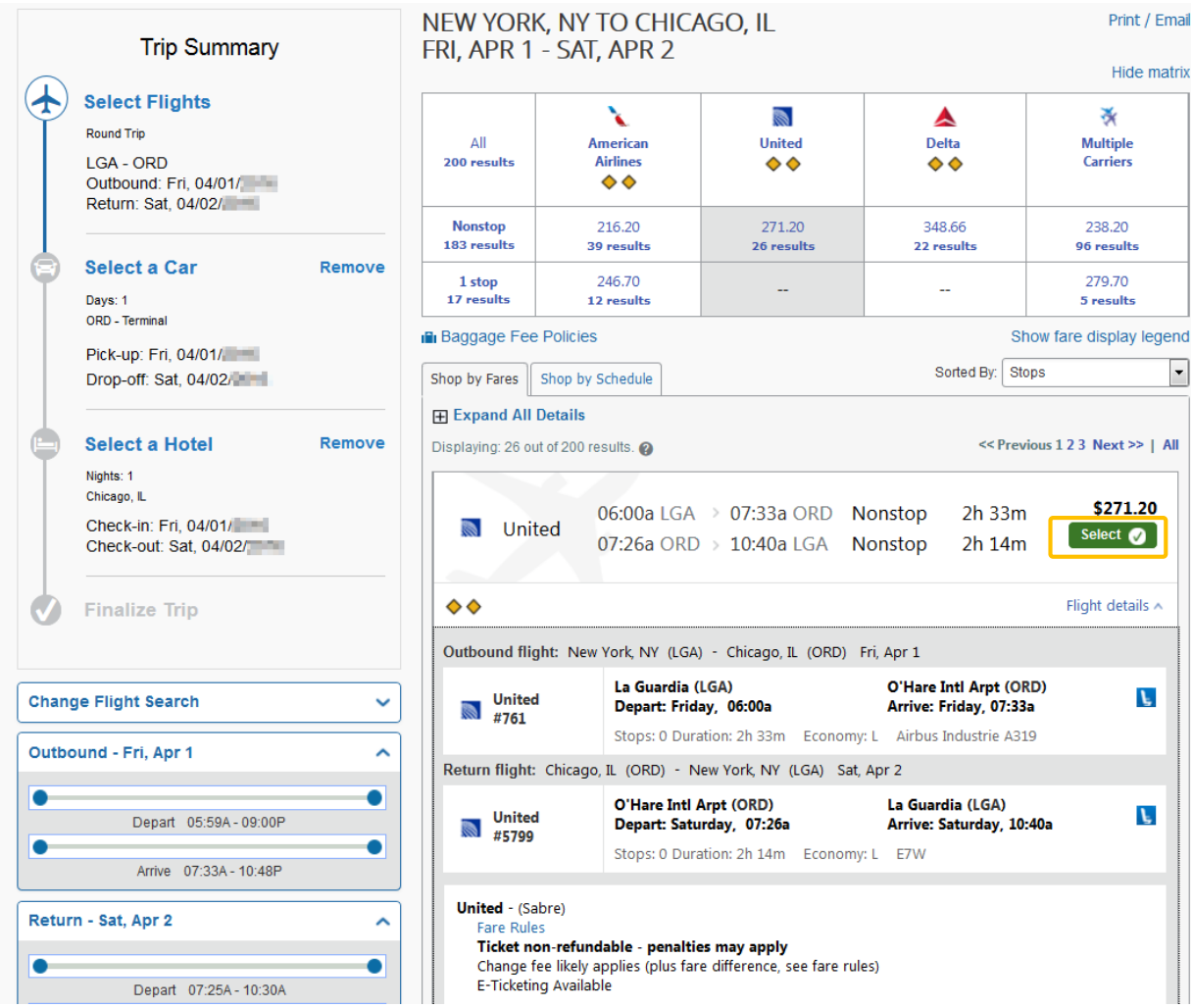
- A *red* **Select** button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager.
- A *grey* **Select** button indicates you cannot select this fare.

To see what policy rule is being violated click **Show details**. For more details about your Policy, please see **Policy** tab.



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Step 2-B: Select a Flight (Search by Schedule)

When selecting a flight in the Shop by Schedule mode, follow the steps below.

How to…

1. You are on the search result page looking at the **Shop by Schedule** tab. Select your outbound flight from the **Outbound** tab.

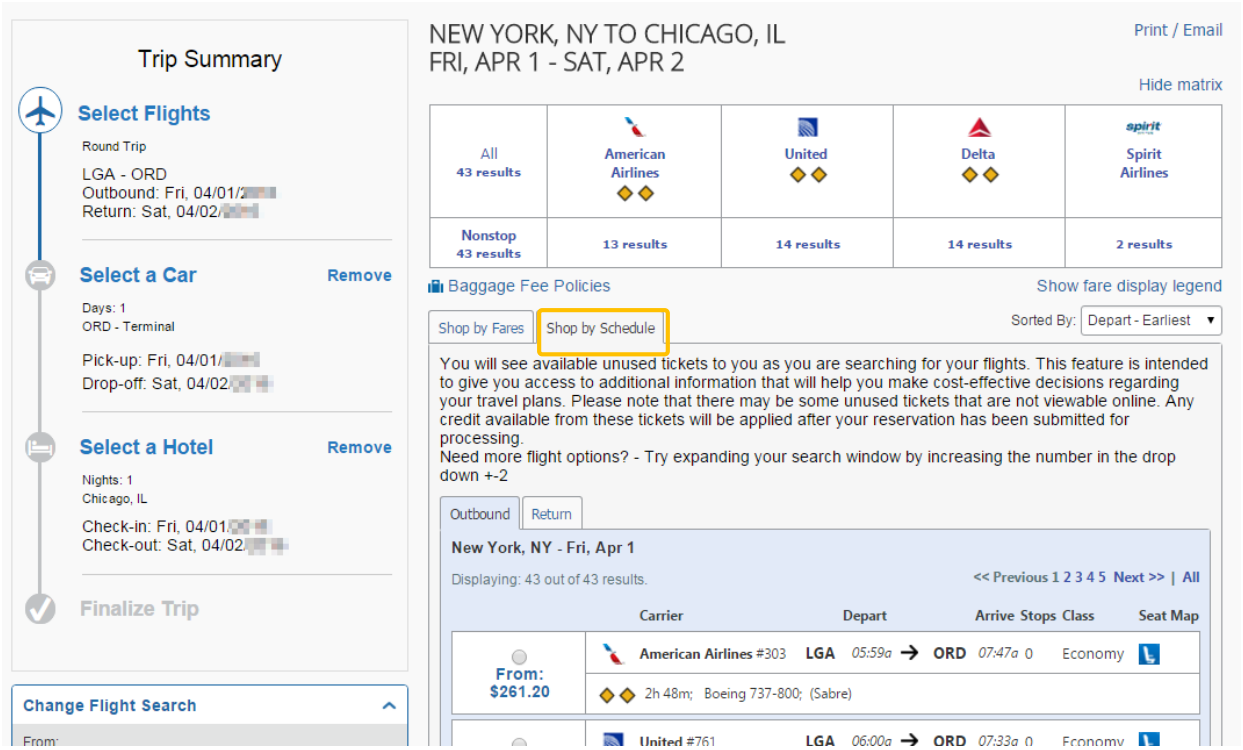
2. After selecting your outbound flight, the **Return** tab is automatically selected. Select your return flight.

3. Click **Price these options**

Additional Information

You can adjust your search conditions via **Change Flight Search.**
You are able to combine different airlines.

The prices are shown as **Starting From**; this is a rough estimate of what the total price will be. Depending on the outbound flight you choose, total price will vary.
The final price is shown after clicking **Price these options.**



4. Click on **Show details** for the flight you are interested in and check the flight details. Then click **Close**.

From the flight details click **Fare Rules** if you want to see fare information such as conditions for refunds, penalties for ticket changes etc.

Concur Travel automatically selects a corresponding frequent flier program from the profile, if available. If needed, add or choose a different frequent flier program to the flight under **Frequent Traveler**

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How to…	Additional Information
5. Choose your seats as explained on page 19	If you do not select a seat Concur will assign a seat based on the **Travel Preferences** section in your profile.
6. Click **Select**	Policy information appears next to the **Reserve** button. The **Reserve** buttons are color coded as: • A *green* **Select** button indicates the fare is within policy. • A *yellow* **Select** button indicates the fare is outside of policy. If you select this fare, you must enter additional information which may be sent to your manager, depending on your company's settings. • A *red* **Select** button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager. • A *grey* **Select** button indicates you cannot select this fare. To see what policy rule is being violated click **Show details**. For more details about your Policy, please see **Policy** tab.

Step 3: Select a Car

If you selected **Pick-up/Drop off car at airport** on the Flight tab, the car results appear after you choose your flight.

How to…	Additional Information
1. From the car results page, select a rental car.	If you selected **Automatically reserve this car**, Concur Travel will automatically add your car and skip the car search results page. After flight you will be immediately directed to the hotel result page, if you selected **Find a Hotel**
2. Select the appropriate rental car, and then click **Select**.	You can change the results' sorting order under **Sort By**.
3. If you want to add a GPS to your car reservation check the box **In-car GPS system** at the Review and Reserve Car page.	Yellow diamonds indicate preferred vendors.

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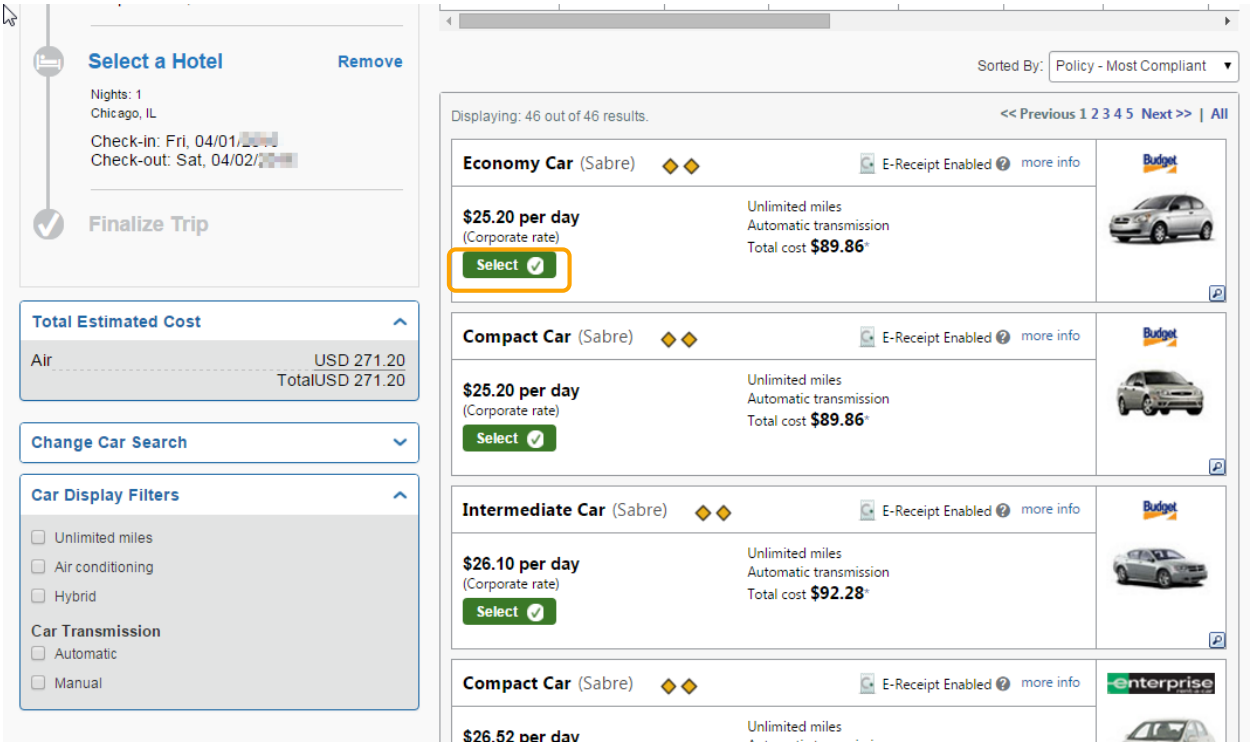
If you have a car program ID (Frequent Traveler) number in your profile, the number will be automatically added when applicable.

At the **Review and Reserve Car page** you can add a car program number or leave message that will go directly to the vendor at the **Provide Rental Car Preferences**.



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Step 4: Select a Hotel

If you selected the **Find a Hotel** option on the Flight tab, the hotel results appear after you choose your rental car.

How to…	Additional Information
1. Select a hotel	You can change the sorting order under **Sort By**. You can sort the list of hotels by **Preference**, **Price**, **Rating**, **Distance** and **Policy**.
2. Click **more info** to see more details of the hotel	To search for a specific hotel property, enter the property name, the first letters of the name or the chain name in **the With names containing** box. On the left hand side you can also filter by **Hotel Chain** and/or **Amenities**. Checking a box will hide all hotels that do not match the chain/amenities selected.
3. Click **choose room** to view room rates.	Click on the picture of the hotel to bring up more and larger pictures of the hotel. Each of the hotels appears with its corresponding number on the map at the top of the page. Different colors indicate your company's preference rate. Preferred hotels are indicated with pink dots.
4. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Select**.	The Reserve buttons are color coded as follows: • A *green* **Select** button indicates the room is within policy. • A *yellow* **Select** button indicates the room is outside of policy. If you select this room, you must enter additional information which may be sent to your manager, depending on your company's settings. • A *red* **Select** button indicates the room is outside of policy. If you select this room, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager. • A *grey* **Select** button indicates you cannot select this room. A grey or yellow diamond indicates that the hotel property is company preferred.

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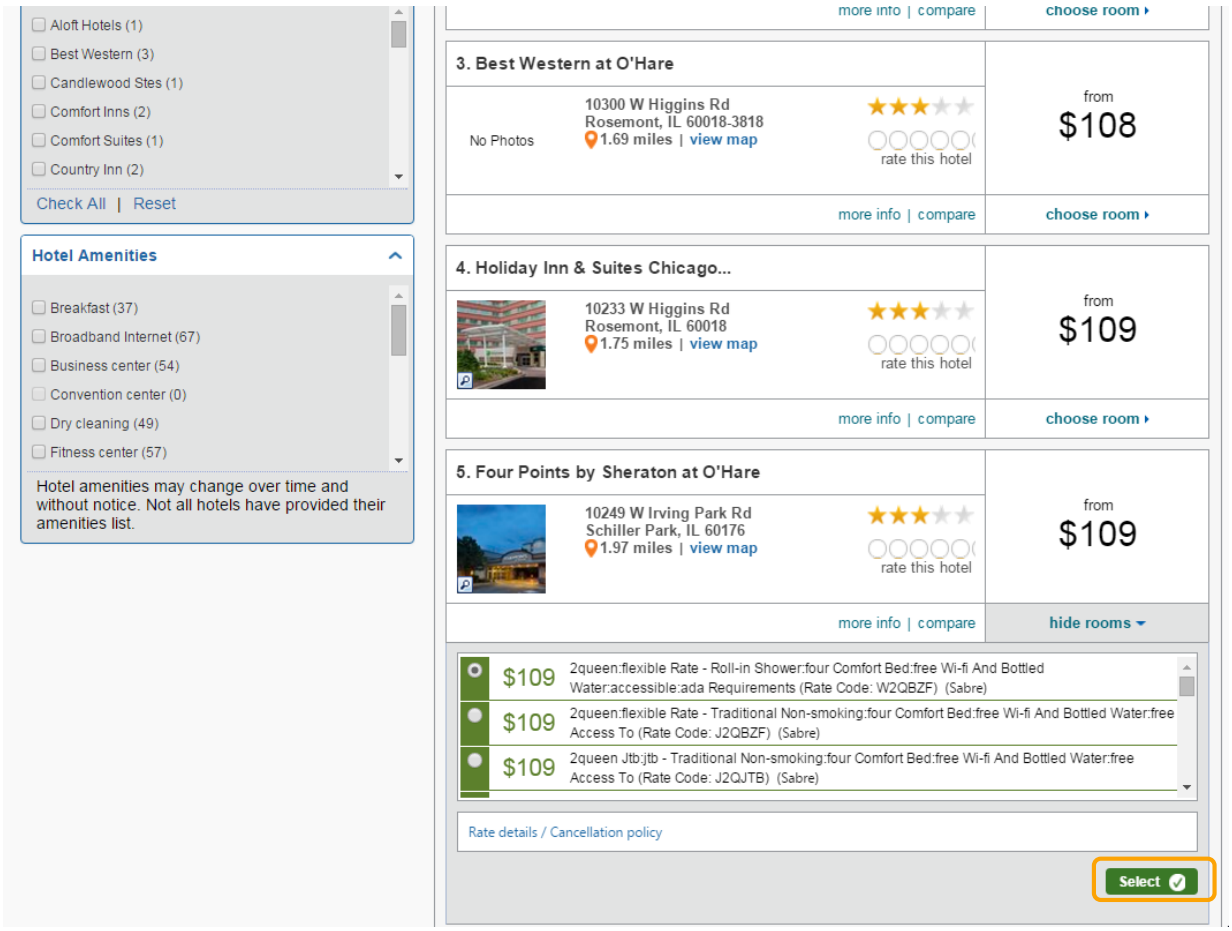

5. Review the information on the **Rate details/Cancellation policy** pop-up window, click to agree**,** and then click **Continue.**

On the **Rate details/Cancellation policy** pop-up watch for information on when the room's cancellation deadline is. To avoid penalties, cancel within the cancellation policy and avoid booking deposit required rates.

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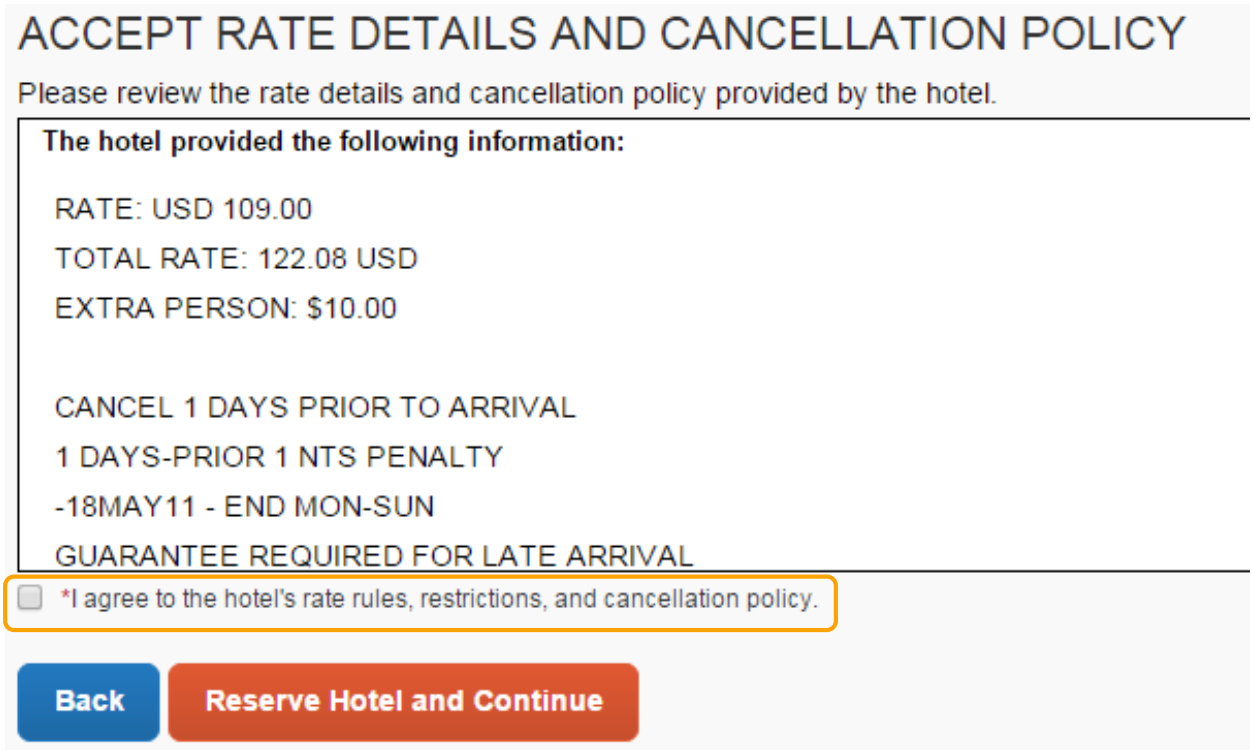

Step 5: Complete the Reservation

How to…	Additional Information
1. Review the details of the reservation on **the Trip Overview** screen, and then click **Next**.	You can still make any changes to your reservation before submitting it. If you want to add any arrangement to your trip, click on the appropriate icon in the top right corner under **Add to itinerary**
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.	The trip name and description data are for your record keeping. If you enter a name for your trip here, this trip name will be displayed under Upcoming Trips on your Concur Home.
3. If you want to hold your trip, click **Hold Trip** If you want to confirm your trip, click **Next.**	If you hold your trip, you can hold your itinerary for as long as the date and time indicated with **You may HOLD this reservation until** above the hold button. Air fares are not guaranteed until ticketed.
4. On the **Trip Confirmation page** Click **Confirm Booking** or **Purchase Ticket** to finalize your trip.	If your reservation needs approval or if you are booking only a car or hotel without air the button will read **Confirm**. If your reservation contains air or rail and does not

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need approval the button will read **Purchase Ticket**.

5. Check if the screen changes to an announcement starting with **Finished!** to make sure your trip is submitted.

Finished!
You have successfully booked your trip!

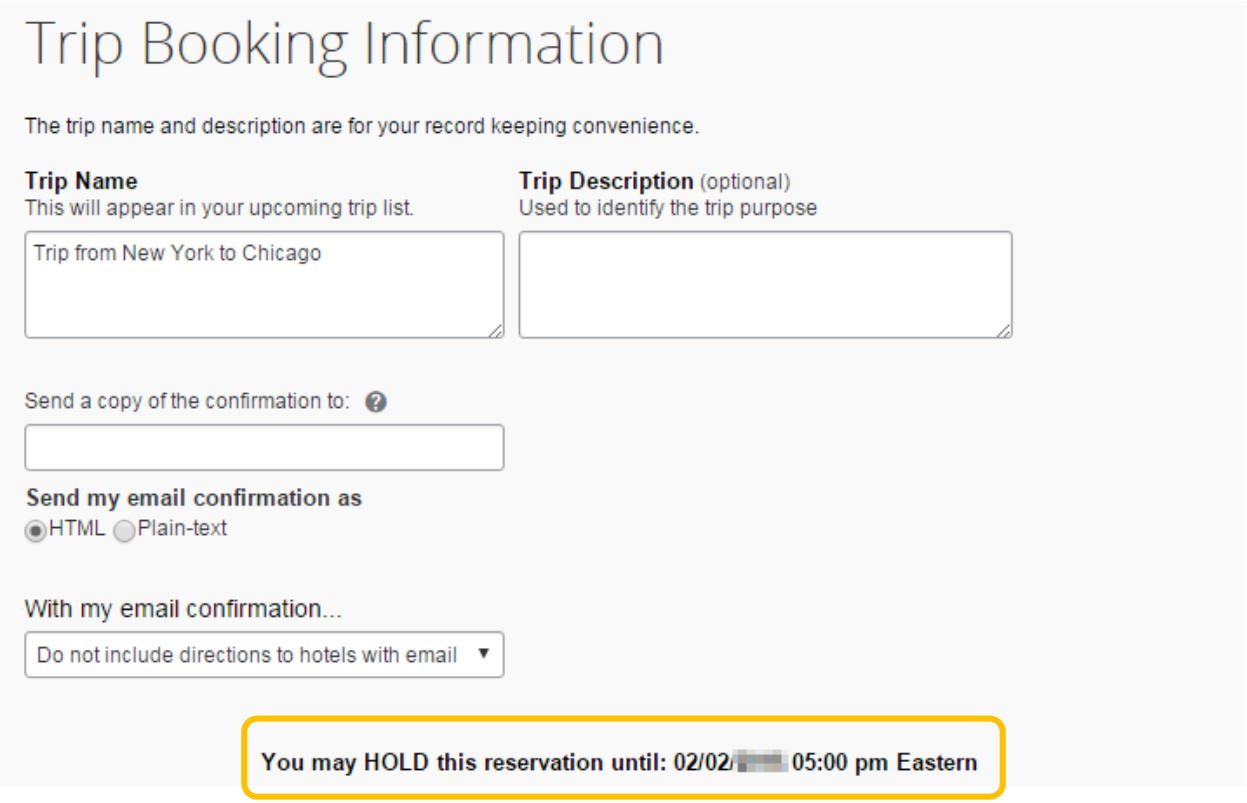
Trip Record Locator : EHYHLN

You have to click **Confirm** or **Purchase Ticket** to finalize your reservation.

Your reservation will be cancelled after 6 hours if you do not confirm your reservation.

When the screen announces: **Finished! You have successfully booked your trip! Trip Record Locator: XXXXXX**
Then you are sure your reservation has been submitted and finalized.

To cancel press the **Cancel** button. All arrangements in your itinerary will be cancelled.



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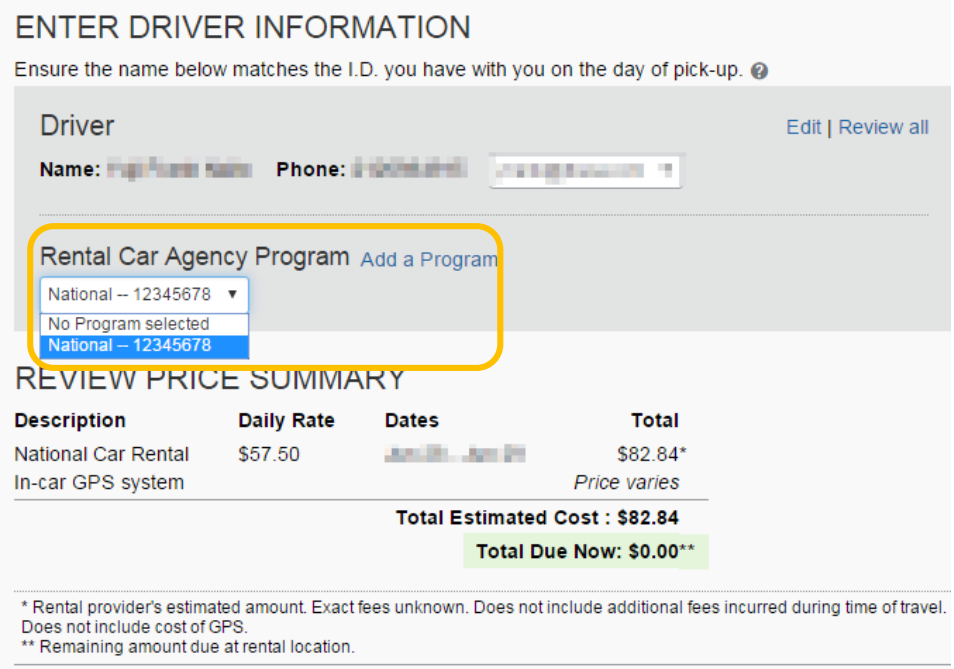
6. If you have a program with air, hotel, or car agency, make sure to select the appropriate program to obtain points/miles/

You can add programs by selecting "Add a Program"



Section 5: Single Type Reservation

You can book a Car / Hotel / Rail only by using the corresponding tabs on the travel wizard.

Step 1: Book a Car only

How to…	Additional Information
1. On the **My Concur** or **Home** page, click the **Car** tab	
2. Enter the Pick-up date and Drop-off date.	
3. Select **Airport Terminal** and enter an airport name if you want to pick-up a car at the airport. Select **Off-Airport** and enter a place name if you want to search for rental car locations not located at an airport.	If you choose **Off-Airport**, click on the **Search** link next to the text box or click on the text box to bring up a pop-up window to choose your location. Enter a center point for your search from the following options:

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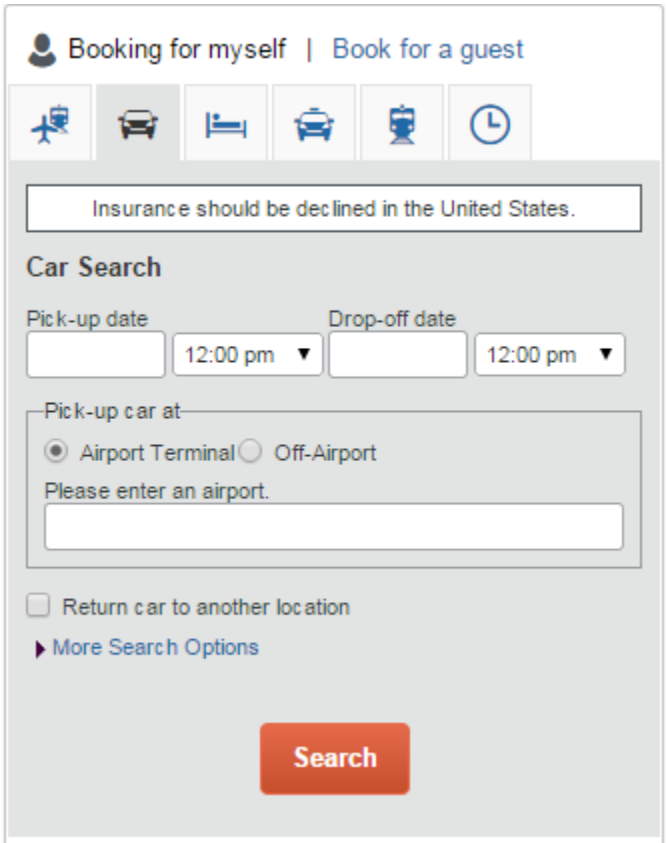
- Airport
- Address
- Company Location
- Reference Point / Zip Code

Enter a radius in miles or kilometers, and then click the **Search** button. A list of available locations to choose from will come up.

4. If you want to return the car to a location different from your pick-up location, check **Return car to another location** and enter a return location.
5. Click **Search**.
6. Follow the instructions on screen to choose a car and complete your reservation.

For more details on how to continue with your car reservation, see page 22-23.
For more detail on how to finish your reservation, see page 26-28.



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Step 2: Book a Hotel only

How to…

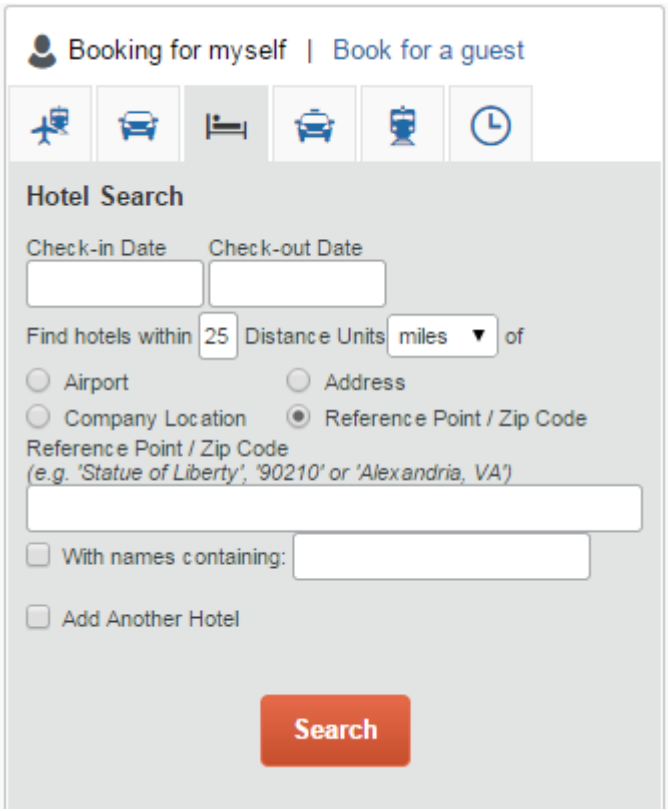
1. On the **My Concur** page, click the **Hotel** tab on the left side of the page.
2. Enter the **Check-in Date** and **Check-out Date**.
3. Enter the location of the hotel
4. Click **Search**.
5. Follow the instructions on screen to choose a hotel room and complete your reservation.

Additional Information

You can search for a location by:

- Airport
- Address
- Company Location
- Reference Point / Zip Code

For more details on how to continue with your hotel reservation, see page 24-26.
For more details on how to finalize your reservation, see page 26-28.



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Step 3: Book a Limo only

How to…	Additional Information
6. On the **My Concur** or **Home** page, click the **Limo** tab	
7. Select Vehicle type as "Sedan"	
8. Enter the Pick-up date and Drop-off date.	
9. Select **Airport Terminal** and enter an airport name if you want to pick-up a car at the airport. Select **Off-Airport** and enter a place name if you want to search for rental car locations not located at an airport.	If you choose **Off-Airport**, click on the **Search** link next to the text box or click on the text box to bring up a pop-up window to choose your location. Enter a center point for your search from the following options: • Airport • Address • Company Location • Reference Point / Zip Code Enter a radius in miles or kilometers, and then click the **Search** button. A list of available locations to choose from will come up.
10. If you want to return the car to a location different from your pick-up location, check **Return car to another location** and enter a return location.	
11. Click **Search**.	
12. Follow the instructions on screen to choose a car and complete your reservation.	For more detail on how to finish your reservation, see page 26-28.

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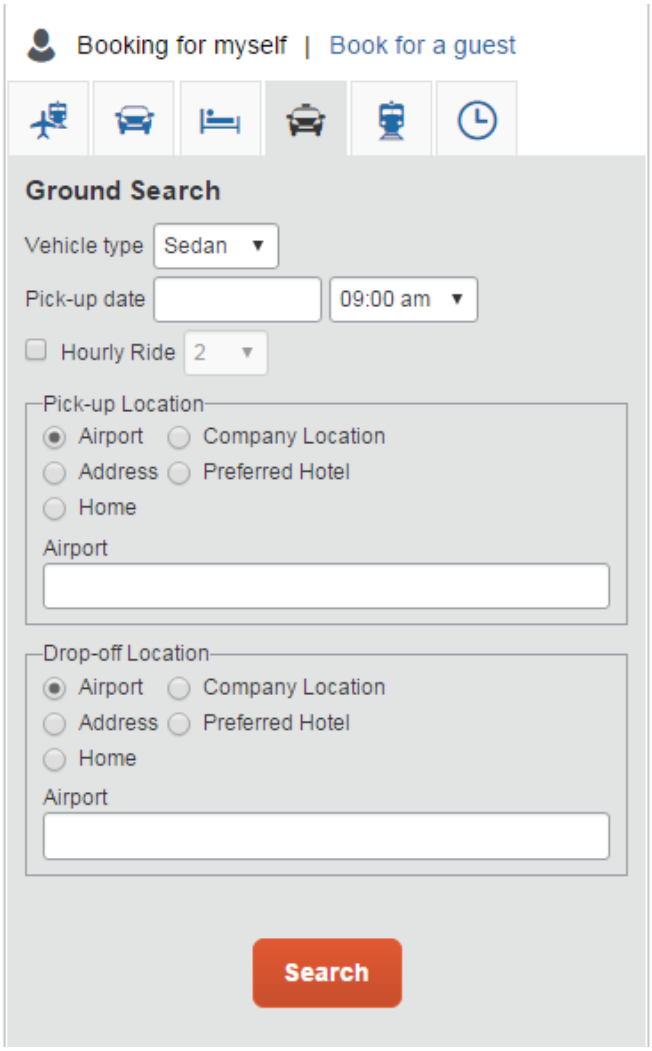

Step 4: Book a Rail (Amtrak) only

How to…	Additional Information

1. On the **My Concur** or **Home** page, click the **Rail** tab on the left side of the page.

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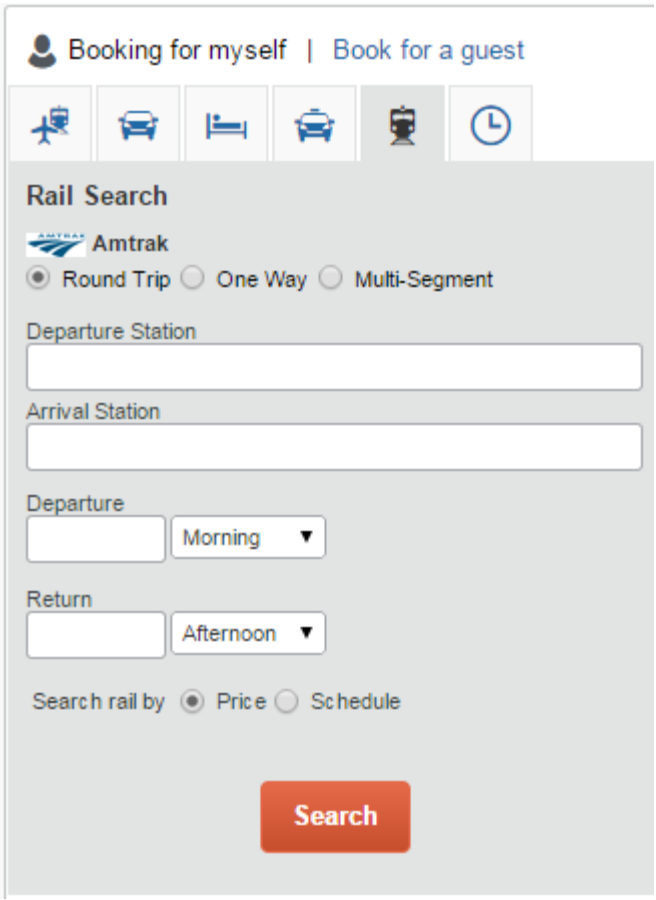

2. Select the **Trip Type**.
   - Round Trip
   - One Way
   - Multi-Segment
3. In the **Departure Station** and **Arrival Station** fields, enter the begin and end stations for your trip.

   When you type in a city, airport name, airport code or station name, Concur Travel will automatically search for a match.
4. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.

   You can choose from **Morning**, **Afternoon**, **Evening, Anytime** or select a specific hour. Concur Travel searches before and after the time you have specified in a range from 2 up to 12 hours.
5. Click **Search**.
6. Select the train you would like to reserve, click the Fares button and choose a fare.
7. Click Select button.

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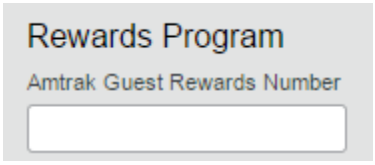
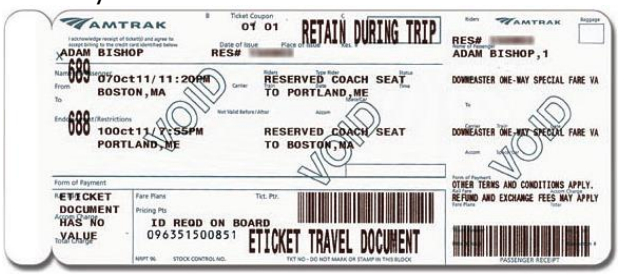
8. Enter your rewards number if you have one.



9. Select a ticket delivery method.

Amtrak ticket example – select a method how to receive your actual tickets.



Quik-Trak:

You will receive a confirmation email directly from Amtrak. At a Quik-Trak kiosk located at major Amtrak stations you can pick up your actual tickets (see example on right) by scanning the barcode on your printed confirmation page. The Quik-Trak kiosk will print your actual tickets and you'll be on your way.

Ticket Counter:

You will receive a confirmation email directly from Amtrak. You can pick up tickets at the ticket office of any staffed Amtrak station. Show your printed confirmation page and a photo ID to the staff at the ticket counter. They will print your tickets and you'll be ready to board the train.

Electronic:

You will receive your e-ticket in an email directly from Amtrak. When boarding the train bring a print out of your e-ticket or bring a mobile device that can display the confirmation from Amtrak in PDF format. Also bring a photo ID to prove you are the passenger listed on the e-ticket.

10. Select a method of payment.
11. Click **Reserve Rail and Continue.**
12. Enter the necessary information under the Trip Booking Information page, and click Next.

13. Click on Confirm Booking to finish the booking process.

See page 26-28 for more details on how to complete the reservation.

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Section 6: Add a Flight, Car Rental, or Hotel Reservation

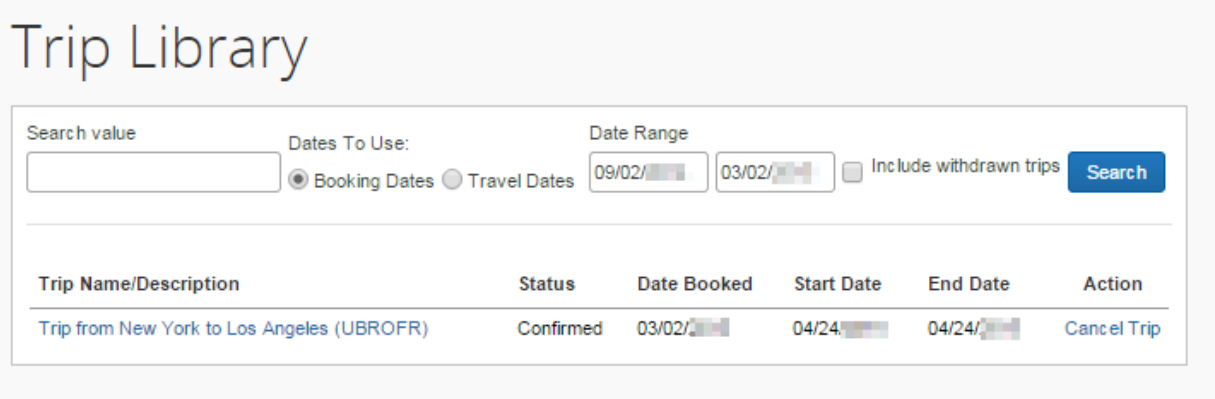
If the status of your trip, listed under Trip Library, does not say Ticketed you can add any arrangement you like to your trip. After the status of your trip has changed to Ticketed you can still add hotels and cars.

How to…

1. On the **My Concur** or **Home** page click the **View Trips** or **My Trips** link to access the Trip Library
2. Under the Trip Library, click on the name of the trip (displayed in blue as a link) you want to add an arrangement to.

Additional Information

You can also add a frequent flyer program after finalizing your reservation.



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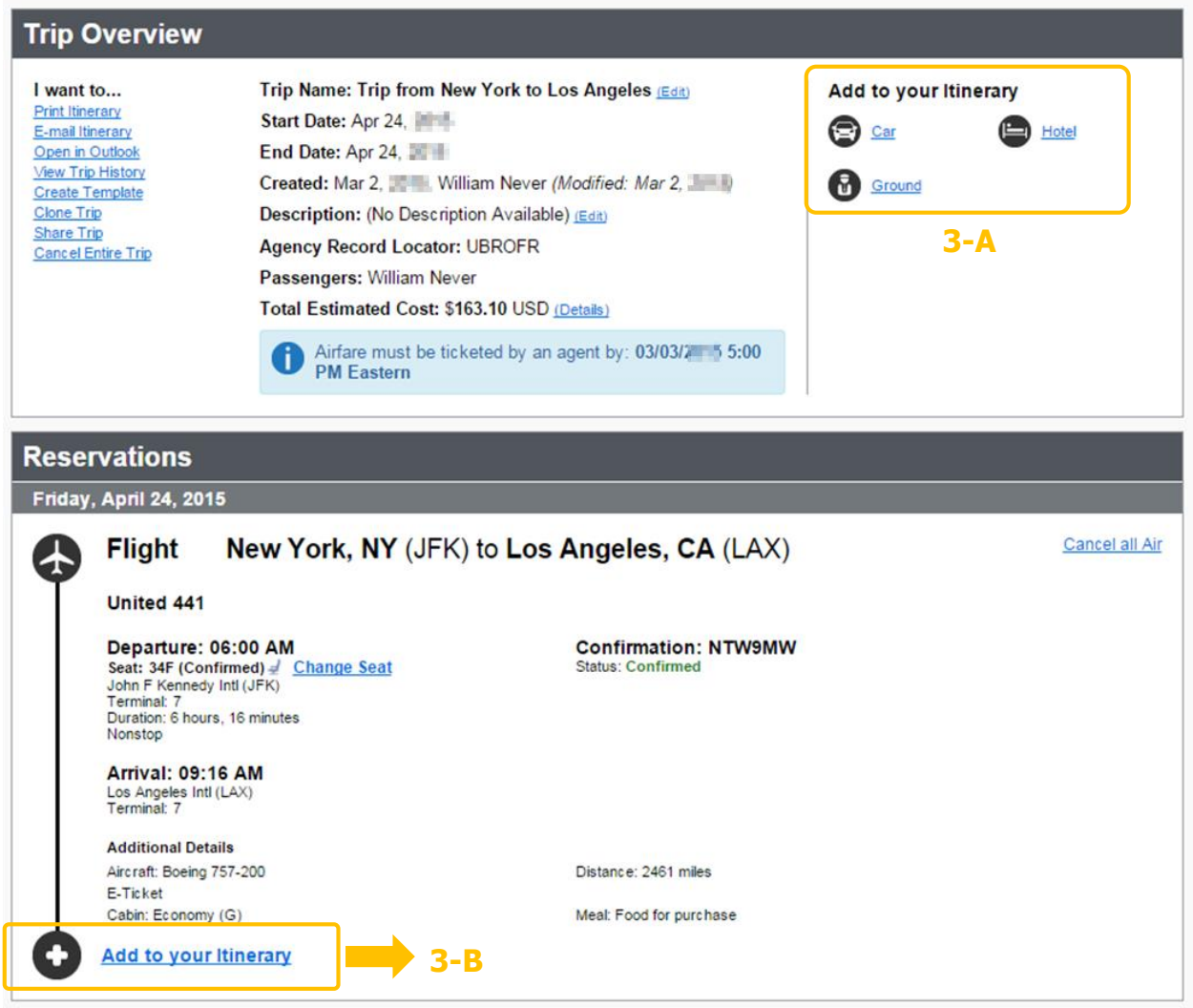

3-A To enter your search conditions from scratch click on the icon corresponding to the arrangement you want to add under **Add to your itinerary** in the top right corner.

4. A simplified search wizard will pop-up, enter your or modify the search conditions
5. Click **Search**

Also you can select the portion of the trip you want to add to on **Trip Overview**.

3-B To add an itinerary following an existing arrangement click **Add to your itinerary** under the portion of the trip you want to add on to.

By adding under an existing arrangement, Concur will automatically pick up the dates, times and location of the existing arrangement. You are able to change the search conditions before searching.

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Section 7: Cancel or Change a Flight, Car Rental, or Hotel Reservation

If the status of your trip indicated under **View Trips** or **My Trips** is not **Ticketed**, you are able to cancel entire trips or parts of trips.

Usually if your trips status says **Ticketed** you are no longer able to cancel your flight through Concur.

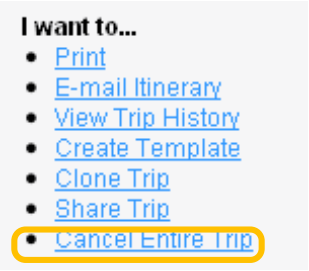
When you are not able to cancel you flight online, please contact your JTB USA reservation center. Some companies are allowing cancellations after ticketing. If you would like to know more about your company's settings please inquire to JTB USA.

Cancel an entire Trip

1. On the **View Trips** or **My Trips** link, click **Cancel Trip** in the **Action** column.
2. Check all details on the pop-up message.
3. Click **OK**.
4. If you are cancelling a hotel, please make sure a cancellation number is returned. If no cancellation number is returned, please contact JTB USA.

Additional Information

You can also go to the **Upcoming Trips** tab, click on the name of the trip (displayed in blue as a link), then on the **Trip Overview** page choose **Cancel Entire Trip** from the menu.



Usually if your trips status says **Ticketed** you are no longer able to cancel your flight through Concur.

You are able to cancel or change hotels and cars reservations until the cancellation deadline decided by the vendor. If you cancel your reservation when the free cancellation deadline has passed a penalty up to the entire cost of the stay may be charged.

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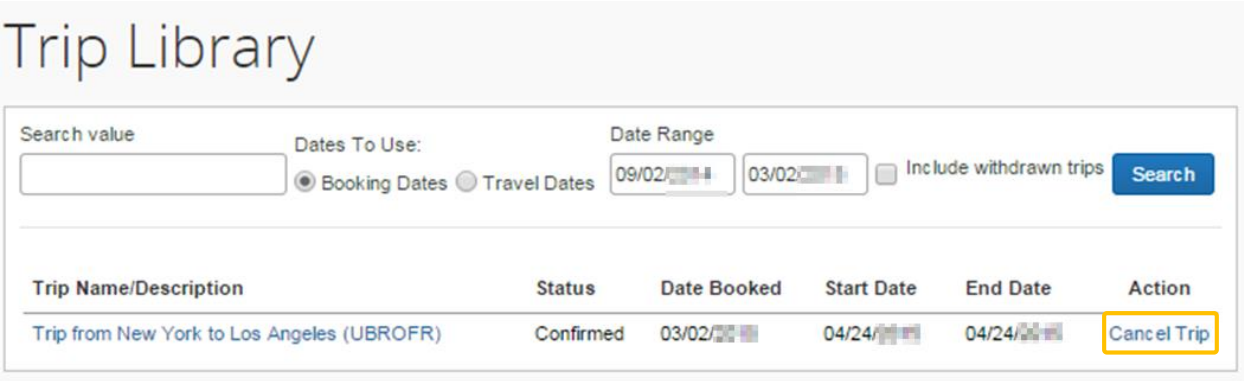

Cancel part of a Trip

1. On the **View Trips** or **My Trips** link, click on the name of the trip (displayed in blue as a link).
2. On the **Trip Overview** page click cancel, indicated next to the part of the trip you want to cancel
3. Check all details on the pop-up message.
4. Click **OK**.

Additional Information

If you are cancelling a hotel, please make sure a cancellation number is returned. If no cancellation number is returned, please contact JTB USA.

Change part of a Trip

1. On the **View Trips** or **My Trips** link, click on the name of the trip (displayed in blue as a link).
2. On the **Trip Overview** page click **Change**, indicated next to the part of the trip you want to cancel
3. A simplified search wizard will pop-up; modify the search conditions.
4. Click **Search**
5. Complete your reservation as described on page 26-28.

Additional Information

For more information on booking each arrangement type (hotel, car, air, rail) please review pages 13-28.

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Section 8: Travel Action Buttons and Icons

Button/Icon	Description
	Airfare: Click to view your airfare booking information.
	Car Rental: Click to view booking information for your car rental.
	Hotel: Click to view your lodging booking information.
	Ground Service: Click to view your ground service booking information.
	Flight Status: Click to view your flight status information.
	Reserve: Reserves the selected trip details.
	Reserve: Reserves the selected trip details.
	Reserve: Reserves the selected trip details. The rate is outside of policy.
	Reserve: Reserves the selected trip details. The rate is outside of policy and will need approval before the itinerary is ticketed.
	Seat map: Click to view the flight seat map.
	Yellow Diamond: Indicates a company preferred vendor.
	Quick Help: Click this icon to pop-up help about the indicated topic

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