QuickStart Guide
Concur® Cliqbook Travel

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Using Concur® Cliqbook Travel

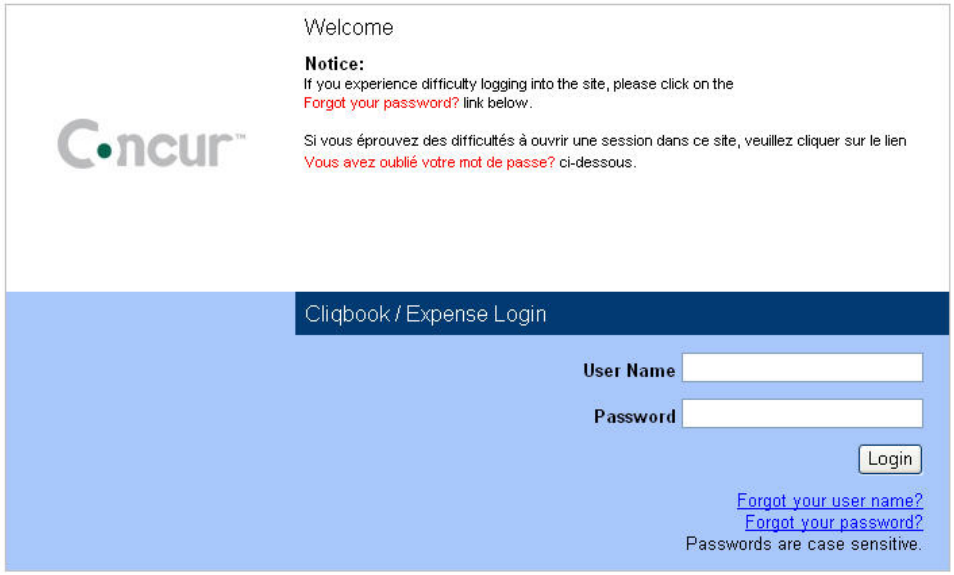
Welcome to Concur CliqbookTravel, Concur's powerful employee travel management solution that enables you to create travel bookings online.

Concur's Cliqbook Travel feature enables you to:

- Search the same vendor inventory that your travel agency uses.
- Find, coordinate, and reserve your airline, rental car, hotel, rail, limo, or dining reservations for your business travel.
- Comply with your company's travel policy when booking your travel.

Step 1: Log on to Concur Cliqbook Travel

How to…	Additional Information
1. Logon to **Concur Cliqbook Travel**. www.travelfocus.com/calypso or www.concursolutions.com	When starting Concur Cliqbook Travel, you will first see the **Log On** page. When logging onto Concur Cliqbook Travel, remember that your password is case sensitive.



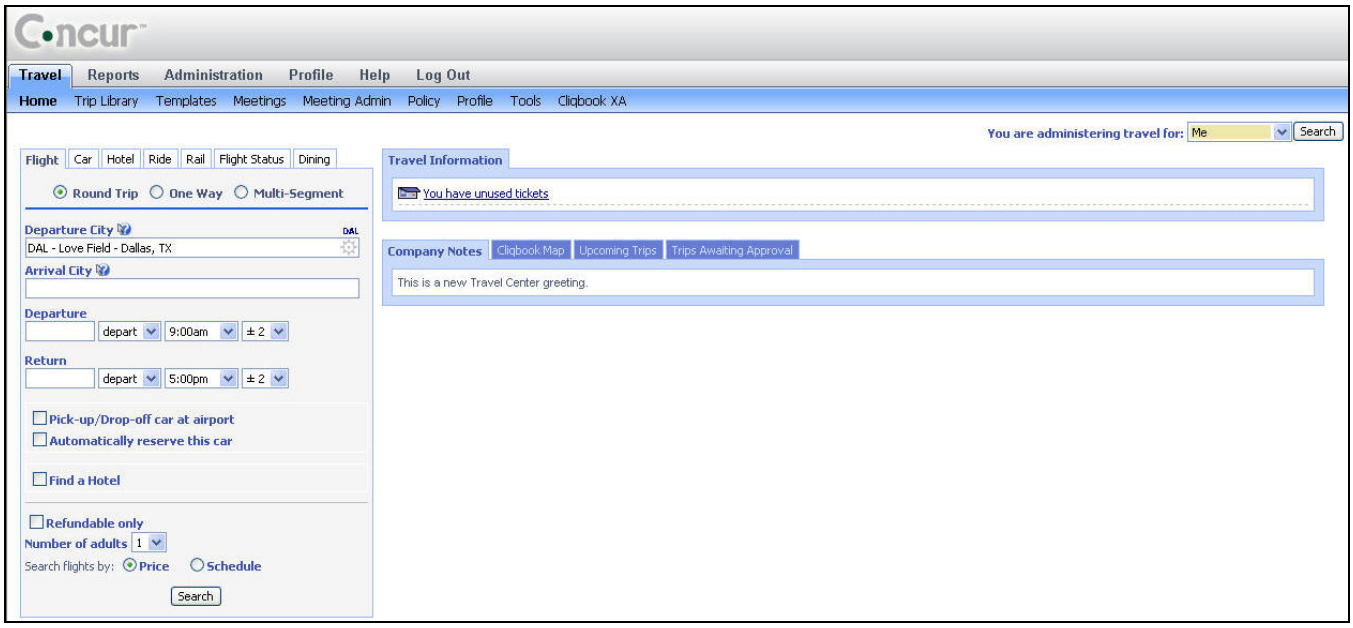
Section 1: Travel Center

From the **Travel Center** page, you can start booking a trip, access other travel information, or view previously booked or completed trips. The links in the grey bar in the application help you navigate through the system. The available links vary based on your company's configuration. The **Travel Center** page is comprised of several sections that make it easy to navigate and find the information you are looking for.

Familiarize yourself with the available options

How to…	Additional Information
Explore the **Home** section.	Select **Home** to return to the **Travel Center** from any location in the travel service.
Explore the **Trip Library** section.	In the **Trip Library** section, you can view a list of trips You can locate trips that fall within a specific date range by changing the dates and then clicking Search.
View the **Templates** section.	In the **Templates** section, you can view company pre-made itineraries or create templates for your own recurring trips.
Familiarize yourself with the **Policy** section.	In the **Policy** section, you can see your company's specific travel rules for using Cliqbook. Check with your travel department for your organization's full travel policy.
Explore the **Profile** section.	In the **Profile** section, you can access or modify your profile as described in the **Travel Profile** section. If you are an assistant or arranger, you can also use this link to access and manage profile information on behalf of another employee.
View the **Tools** section.	In this section, you can find contact information, international travel help, maps, and other helpful travel links.

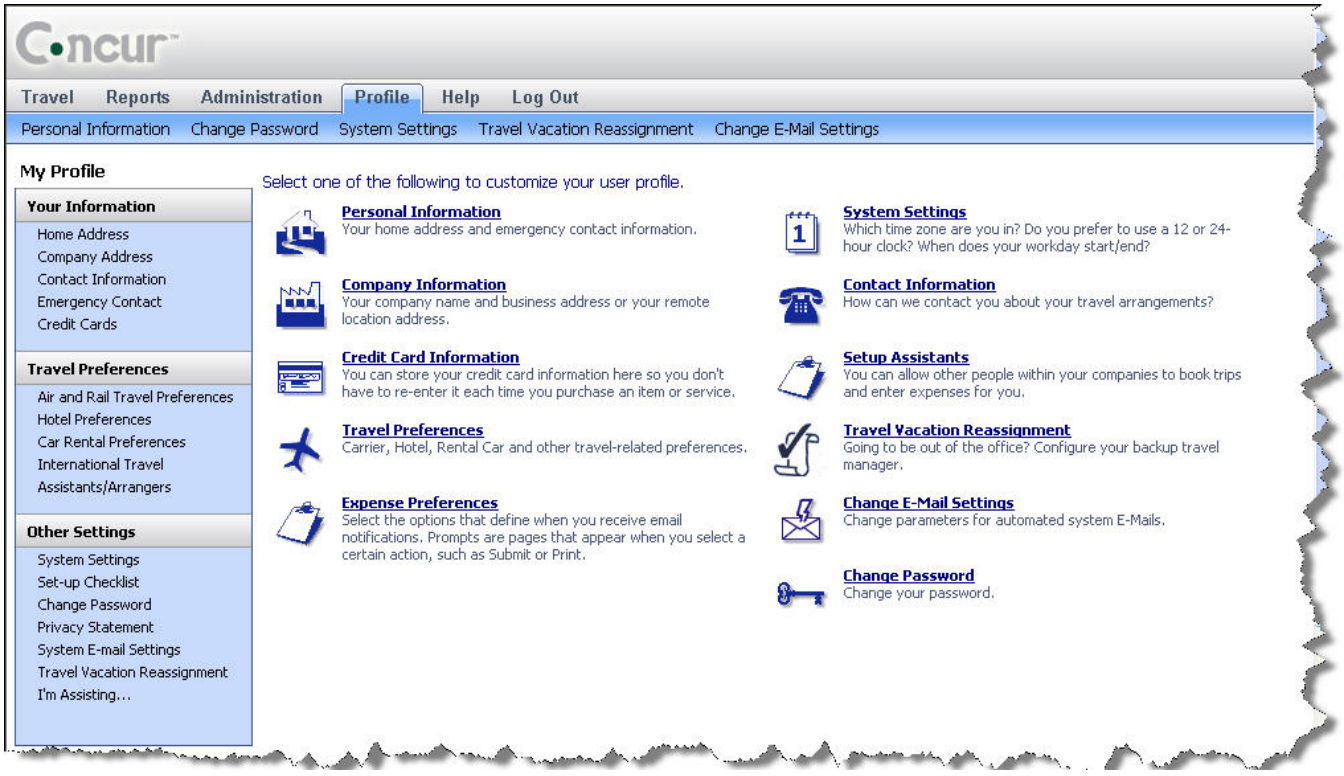
Familiarize yourself with the available options (Continued)



Section 2: Updating Your Travel Profile

Step 1: Change Your Password

How to...	Additional Information
1. On the **Travel Center** homepage, click the **Profile** link on the grey menu bar at the top of the screen.	Before you use Cliqbook for the first time, click the profile link to review and update your profile. You must save your profile before you first attempt to book a trip in Cliqbook. If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the **Profile** page). You can also select the traveler's name from the **Travel Center** page and then click **Profile**.
2. In the **Other Settings** menu, on the left side of the page, click the **Change Password** link.	
3. Enter your new password and then click **Save**.	To change your password, you need to know your old or temporary password.



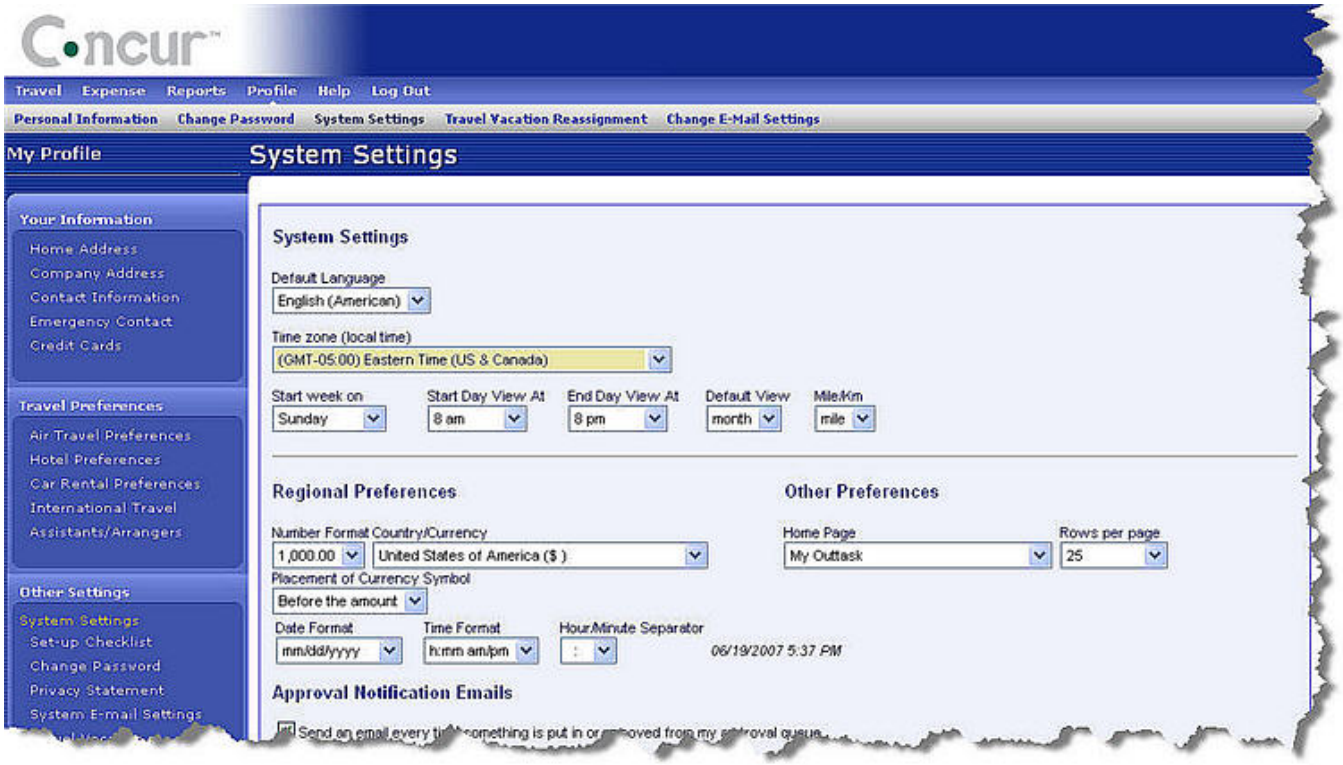
Step 2: Change your Time Zone, Date Format, or Language

How to...

1. On the **Travel Center** homepage, click the **Profile** link on the grey menu bar at the top of the screen.
2. In the **Other Settings** menu on the left side of the page, click **System Settings** .
3. On the **System Settings** page, update the appropriate information and then click **Save**.

Additional Information

You can change the system and regional settings (number, currently, date, and time format).



Step 3: Update Your Personal Information

How to...

1. On the **Travel Center** homepage, click the **Profile** link on the grey menu bar at the top of the screen.
2. On the **My Profile** page, update the appropriate and then click **Save**.

Additional Information

Complete the 8 sections of the **Travel Profile**:

- Name & Airport Security
- Home Address
- Work Address
- Emergency contact
- Contact Information
- Voice Access
- Travel Preferences (such as Aircraft seating, Hotel accommodations, and Car type)
- Credit Cards

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.

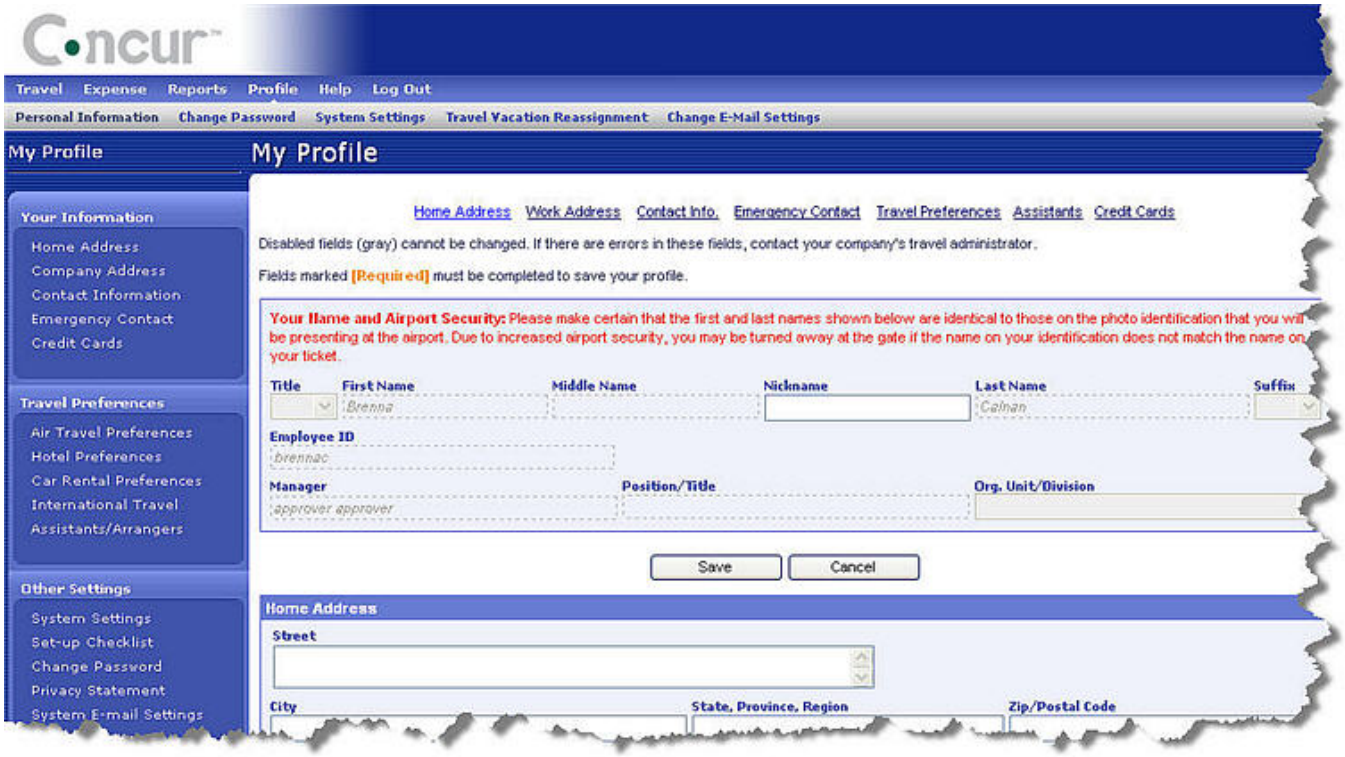
If you cannot edit these fields, contact your travel agency or travel manager to make changes.

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

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

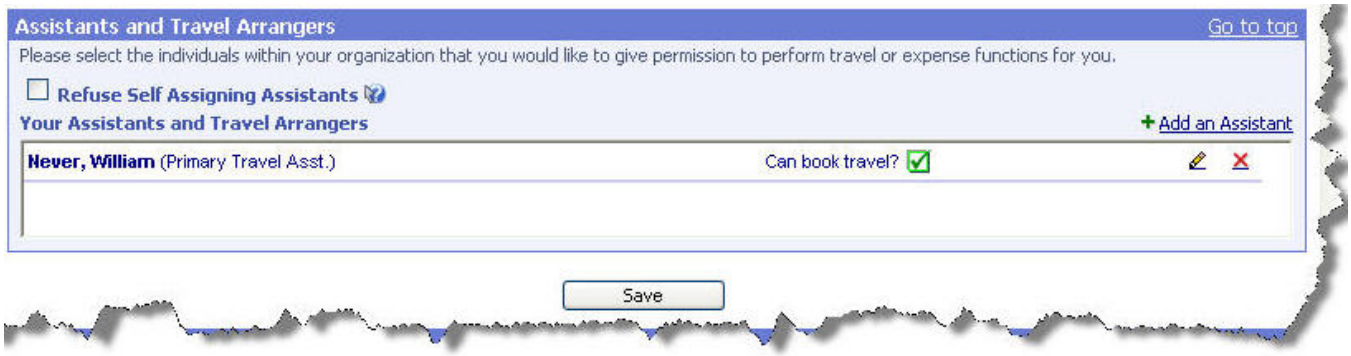
After you save your profile, the **Travel Center** page appears.

Step 3: Update Your Personal Information (Continued)



Step 4: Set up a Travel Arranger or Assistant

How to…	Additional Information
1. On the **Travel Center** homepage, click the **Profile** link on the grey menu bar at the top of the screen.	Use **Assistants & Travel Arrangers** to allow your travel arranger to view and modify your profile or book travel and trips on your behalf.
2. Click the **Assistants** link at the top of the **Profile** screen.	
3. Click the **Add an Assistant** link to search for your assistant's last name.	**Important**: Your assistant must have an existing Cliqbook account before you can add him or her to your profile. **Hint**: When searching, use the following format: *LastName*,*FirstName* (no spaces). For example: Smith,June



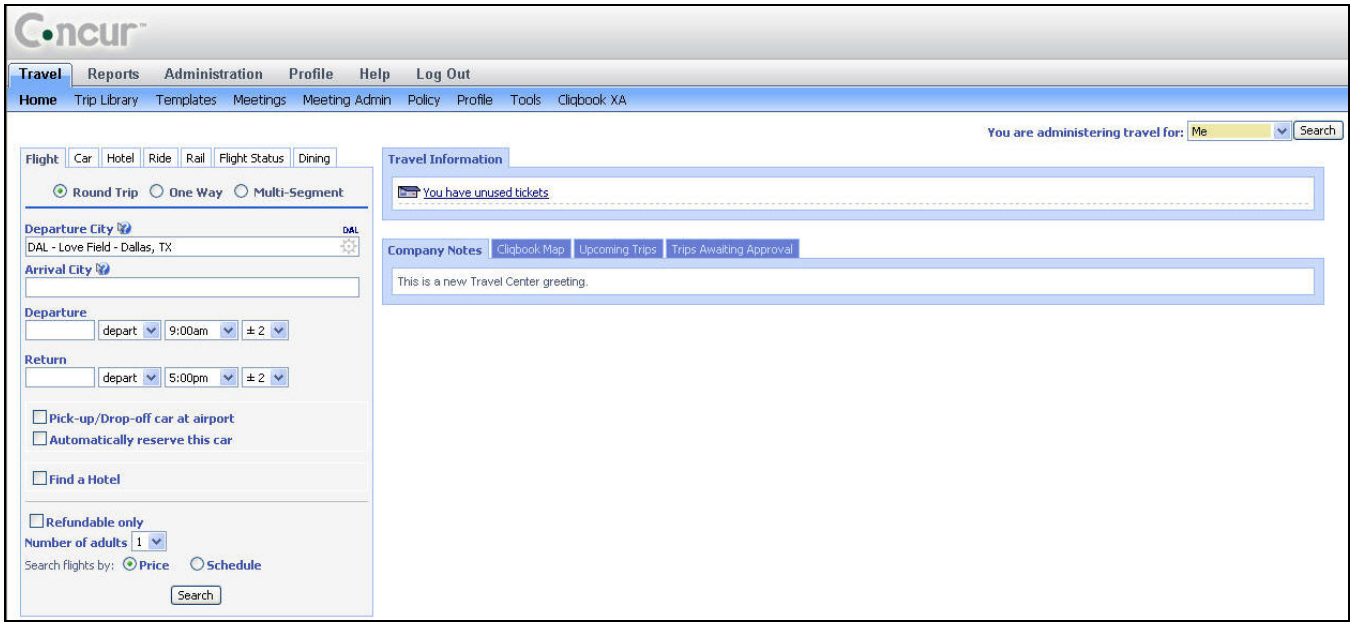
Section 3: Make a Travel Reservation

Step 1: Make a Flight Reservation

How to…	Additional Information
1. Click the **Flight** tab at the left side of the screen.	If you have a Car, Hotel, Limo, or Rail to book without airfare, use the corresponding tabs.
2. Select one of the following types of flight options: ▪ **Round Trip** ▪ **One Way** ▪ **Multi Segment**	
3. In the **Departure** and **Arrival City** fields, enter the cities for your travel.	You can also select your travel cities from the **Cliqbook Map** by clicking on the city. When you type in a city, airport name, or airport code, Cliqbook will automatically search for a match.
4. Click in the **Departure** and **Return** date fields and select the appropriate dates from the calendar.	You can also select the appropriate **Departure** and **Return** times and date range. Cliqbook searches before and after the time you select.
5. If you need a car, select the **Pickup/Dropoff car at Airport** checkbox.	Depending on your company's configuration, you can automatically reserve a car, allowing you bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation. If you need an off-airport car or have other special requests, you can skip this step and add a car from the **Itinerary** page.
6. If you need a hotel, select the **Find a Hotel** checkbox.	You can choose to search for the hotel by: • **Airport** • **Address** • **Company Location** • **Reference Point / Zip Code** (a city or neighborhood) 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 and add a hotel from the **Itinerary** page.
7. If also booking for a companion, select the number from **the Number of Adults** drop down.	If a companion is selected, the payment screen will provide the option to use the credit card from the companion's profile.

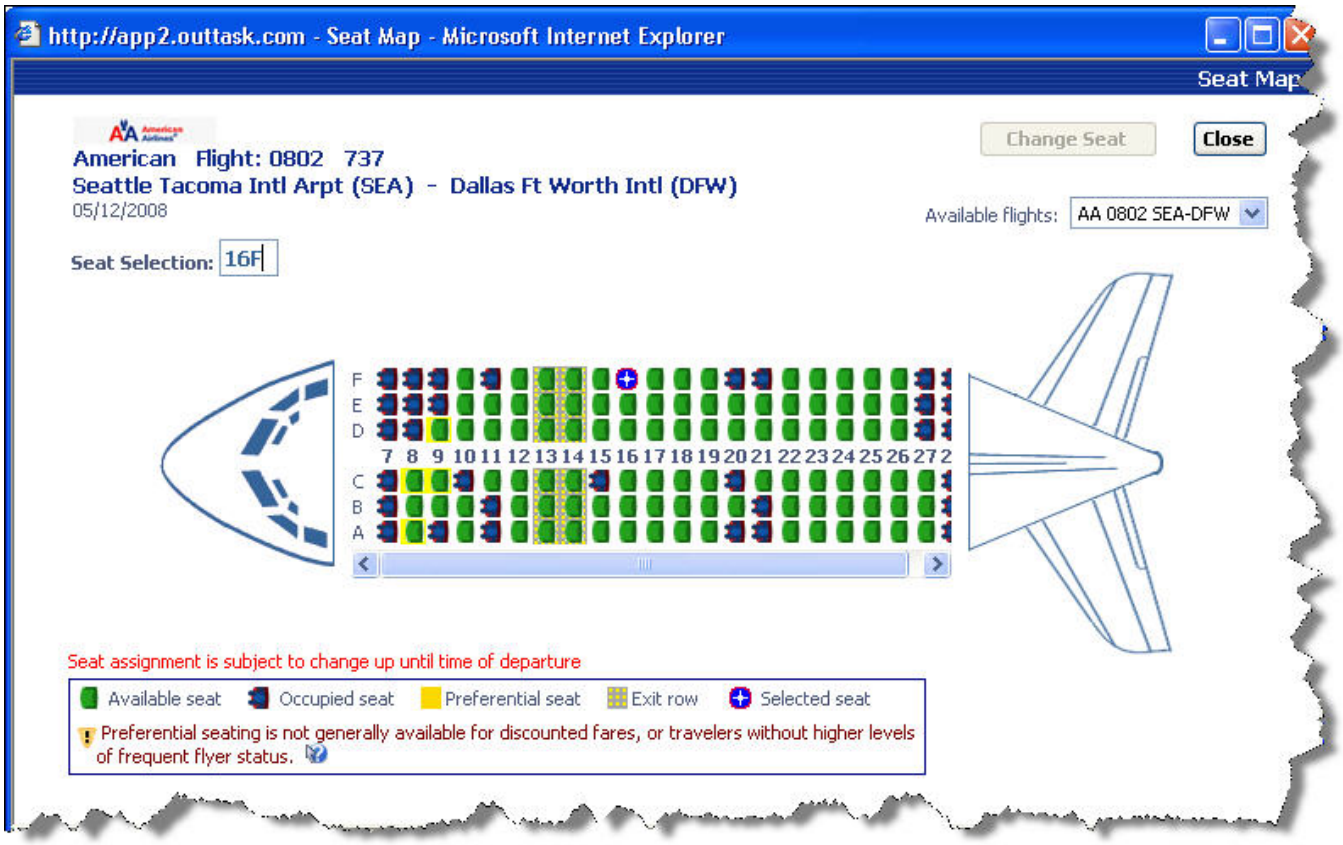
Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
8. Click the **Search for Flights By** button to view the flight results by **Price** or by **Schedule**.	Select **Search by Price** to find fares in Coach/Economy. Select **Search By Schedule** to locate flights in fare classes other than Coach/Economy. When you search by schedule, a list of outbound and return flights will appear. To **filter** the results, select a column, row, or cell in the grid directly above the list of flights. The results will then show flights with the number of stops, airline, or both. To search only fully refundable fares, check the **Flights with No Penalties** box.
9. Click the **Search** button.	



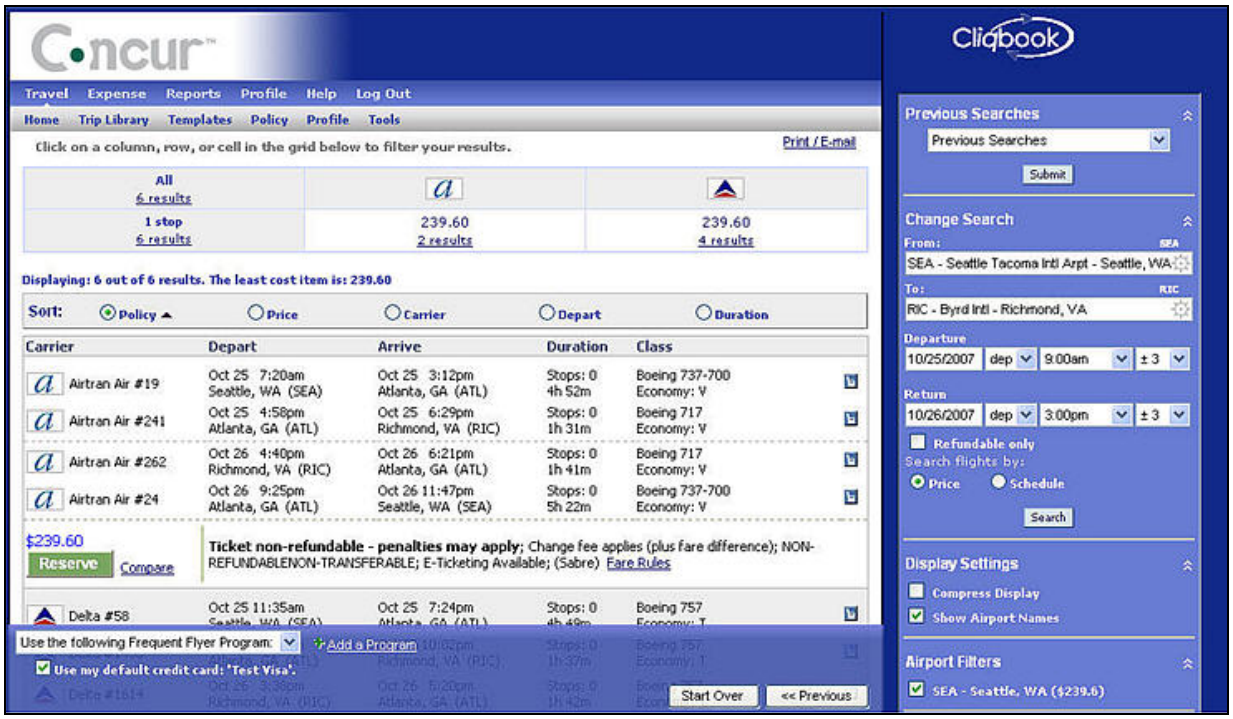
Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
10. After you choose your flight, click the **Select Seat** button next to the flight.	A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential. The bottom right corner shows the number of available seats by class of service for this flight.
11. Select any green (unoccupied) seat and position the cursor over a seat to see the seat number.	Select preferential seats (highlighted in yellow) if you have preferred status on the selected airline. Your frequent flyer number must be in your Cliqbook profile. If you select a preferential seat and this information is not in Cliqbook, your seat request might not be honored. Cliqbook will automatically assign a seat if possible according to the preferences entered in the traveler's profile. Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.



Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
12. Click the appropriate seat to select it.	To change your seat, click the seat you prefer. Position the cursor over a seat to view the seat number. After you select your seat for a flight, you can either click **Change Seat** or select the next flight in your reservation. Cliqbook will prompt you to save your new seat selection.
13. Click the **Reserve** button to select your airfare.	Next to the **Reserve** button, policy information is displayed. The **Reserve** buttons are color coded as follows: • A *green* **Reserve** button indicates the fare is within policy. • A *yellow* **Reserve** indicates the fare is outside of policy. If you select this fare, you must enter additional information. • A *red* **Reserve** 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. When you click **Reserve** to select a fare, Concur Cliqbook Travel & Expense automatically selects the corresponding frequent flier program, if available. You can also select a different program from the list at the bottom of the screen.



Step 2: Select a Car

How to...	Additional Information
1. If you specified that you need a car on the **Flight** tab, you will see car results for the car search.	If you choose to automatically reserve a car, Concur Cliqbook Travel will add your car and then display your hotel results. If you selected **Automatically reserve this car**, Cliqbook will add the car without showing you the flight results.
2. Select the appropriate rental car and then click the **Reserve** button.	You can sort the car results to help find your selection. Yellow diamonds indicate preferred vendors and your preferred car type will be selected automatically. When you click **Reserve** to select a fare, Concur Cliqbook Travel & Expense automatically selects the corresponding frequent rental program, if available. You can also select a different program from the list at the bottom of the screen.



Step 3: Select a Hotel

How to...	Additional Information
1. To filter by hotel chain, click the **Hotel Chain** link and then select the chains you want to view.	If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose your rental car. You can also choose **Show All** or **Hide All** and sort the list of hotels by **Preference**, **Price**, **Chain**, **Rating**, **Distance** and **Policy**.
2. To filter by hotel amenities, click the Hotel **Amenities** link and then select the appropriate amenity options.	
3. Click the **Map of Hotels** link in the upper right corner of the page to view a map of the location you selected and the nearby hotels.	Your company's preferred hotels are displayed as pink dots.
4. Click the **Info** link for a specific hotel to find more detailed information for the hotel.	
5. When you are ready to reserve your hotel room, click the **Reserve** button for the appropriate rate and hotel.	Next to each **Reserve** button, a description, rate details, and cancellation policy is available The **Reserve** buttons are color coded as follows: • A *green* **Reserve** button indicates the hotel rate is within policy. • A *yellow* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information. • A *red* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager. If a hotel is outside of policy, this information will be displayed within in the list of hotels. You can also view the type of rate and room, as well as other information that is available from the agency system. A *grey* or *yellow* diamond indicates that the hotel property is company preferred. When you click **Reserve** to select a fare, Concur Cliqbook Travel & Expense automatically selects the corresponding frequent guest program, if available. You can also select a different program from the list at the bottom of the screen. After clicking the **Reserve** button the Hotel confirmation page appears.

Step 3: Select a Hotel (Continued)

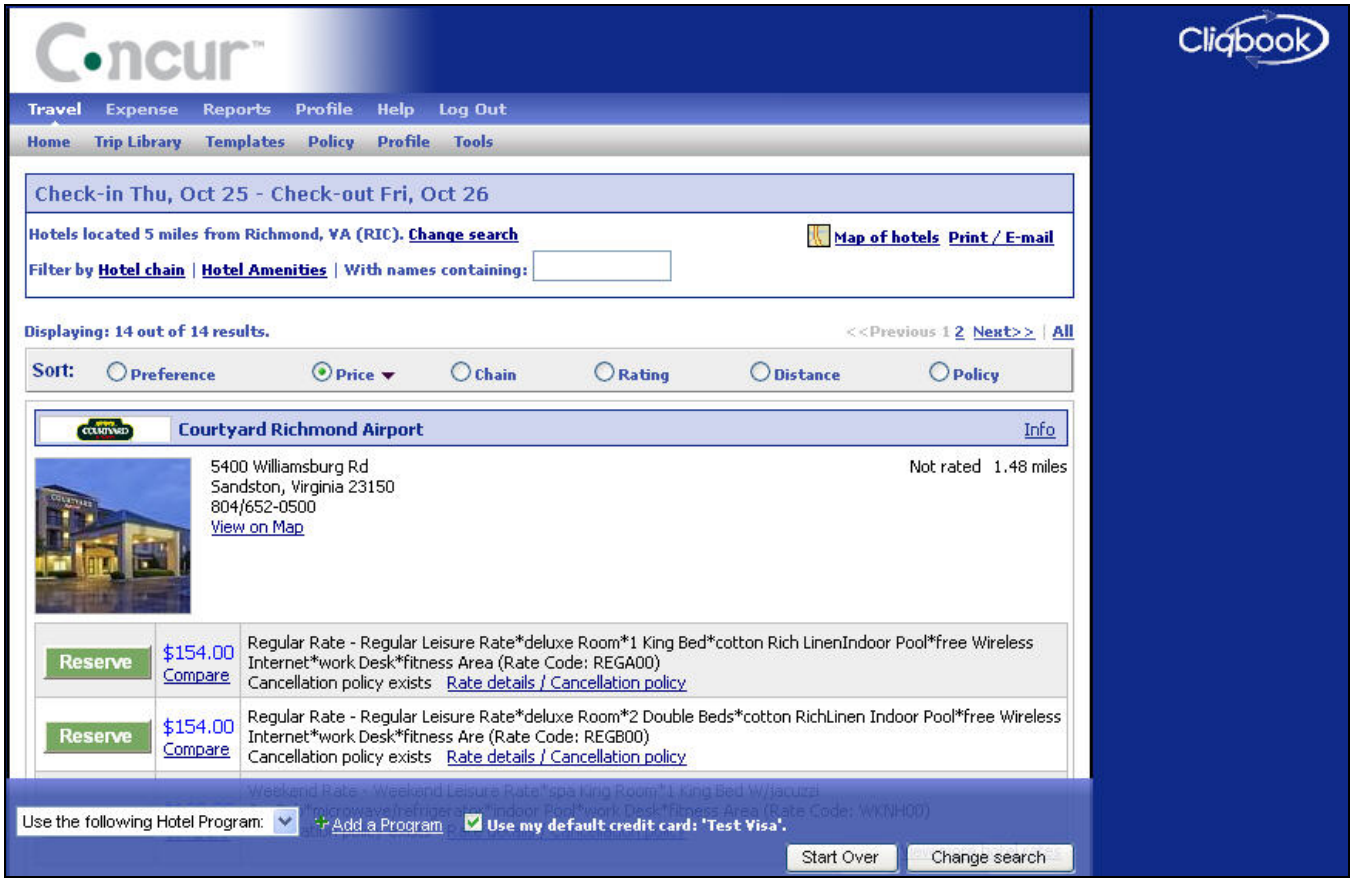
How to...

1. Click the **Next** button.
2. Enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click the **Next** button to finalize your reservation.

Additional Information

The **Trip Booking Information** page appears.

The trip name and description data are for your record keeping. If you have any special requests for the travel agent, please enter them into the agent comments section. Some request may result in higher fees.



Step 4: Pre-populate Your Expense Report

How to...

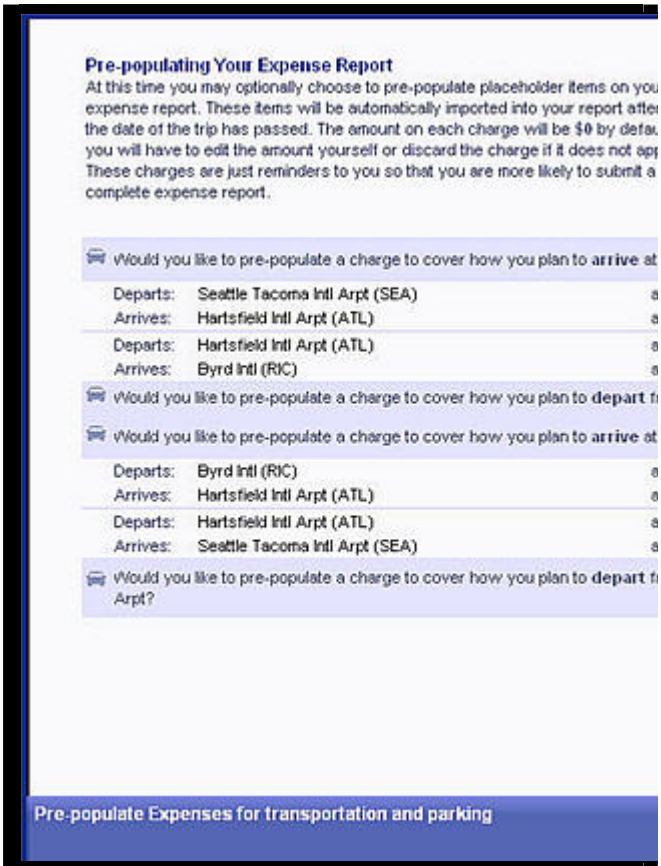
1. On the **Pre-populating Your Expense Report** page, specify the transportation expense you expect to incur for transportation or parking during each segment of your trip.

2. After you have completed each segment of your booking, click the **Finish** button.

Additional Information

After you have completed the reservation, a window appears where you can enter the information to pre-populate your expense report. This information will be automatically imported into your report after the date of the trip has occurred.

By default, the amount of each entry will be populated in your expense report as $0. You must edit the amount or discard the charge if it does not apply. These charges are placeholders that help you submit a complete expense report.



How to...

1. On the **Upcoming Trips** tab, click the name of the trip you want to cancel or change.
2. Select **Change Trip** from the dropdown menu.
3. On the **Itinerary** page, select the portion of the trip you want to change.

Additional Information

Contact the appropriate Website or vendor directly if you did not book your trip using Concur Cliqbook Travel.

From the **Itinerary** page, you can:

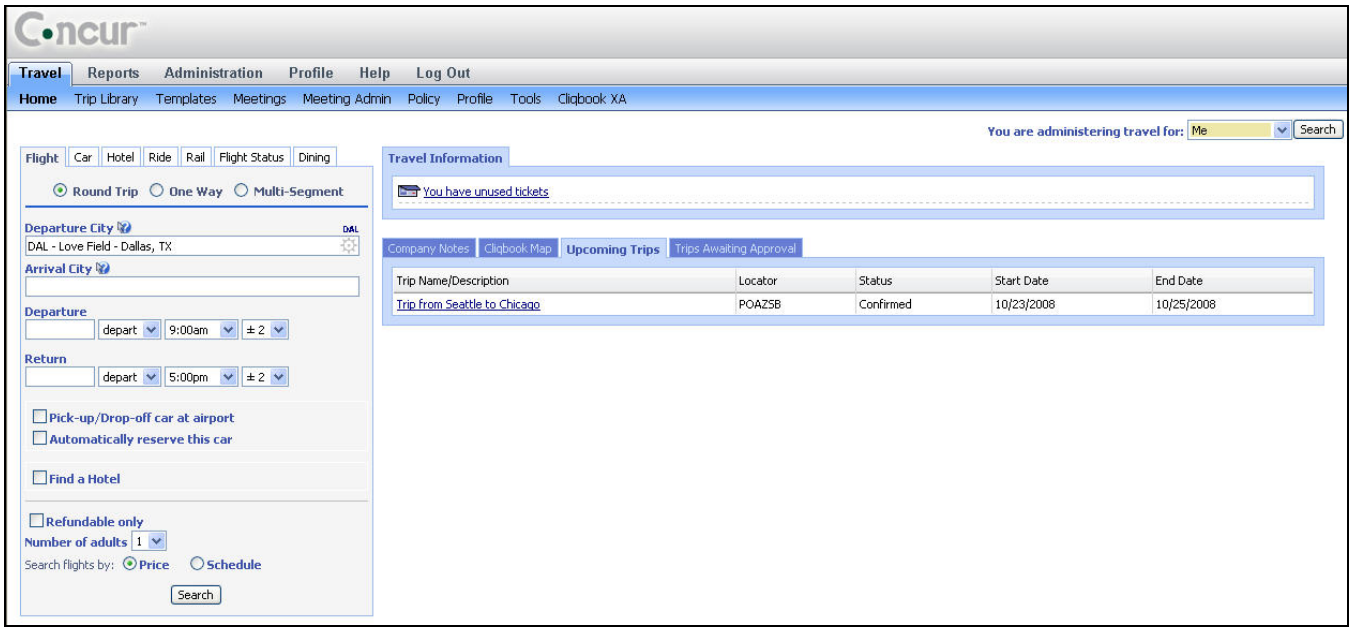
- Email your itinerary

- Change frequent flyer program
- Change seat
- Change the flight day or time for travel (you cannot change the airline)
- Add, change, or cancel car rental
- Add, change, or cancel hotel

4. To cancel your trip, click the name of the trip on the **Upcoming Trips** tab, and then click **Cancel** from the dropdown menu.

If the status changes to **Ticketed**, the **Cancel** link will not be displayed. After a flight is ticketed, you cannot cancel a trip.

If the status is **Confirmed**, you can attempt to cancel. If you get an error message and are unable to cancel the trip in Concur Cliqbook Travel, contact your agent or administrator.



Section 5: Concur Cliqbook Travel Action Buttons and Icons

Button/Icon	Description
	**Tooltip**: Click the tooltip icon to view the associated field-related help.
	**Yellow Diamond:** Indicates a company preferred vendor.
	**Seat map:** Click to view the flight seat map.
	**Airfare**: Click to view your airfare booking information.
	**Rail**: Click to view your rail booking information.
	**Lodging:** Click to view your lodging booking information.
	**Car Rental:** Click to view booking information for your car rental.