QuickStart Guide Concur[®] Cliqbook Travel



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Last Revised - May 2008

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Published by Concur Technologies, Inc. 18400 NE Union Hill Rd Redmond, Washington 98052

Printed in USA

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...

1. Logon to Concur Cliqbook Travel.

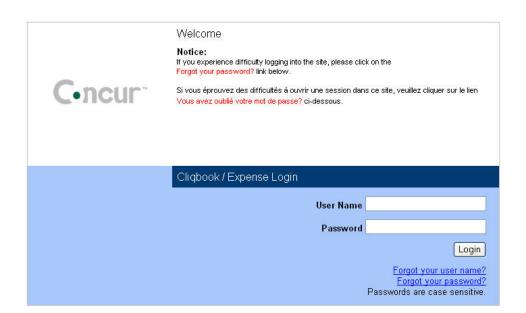
www.travelfocus.com/icon or www.concursolutions.com

Additional Information

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.





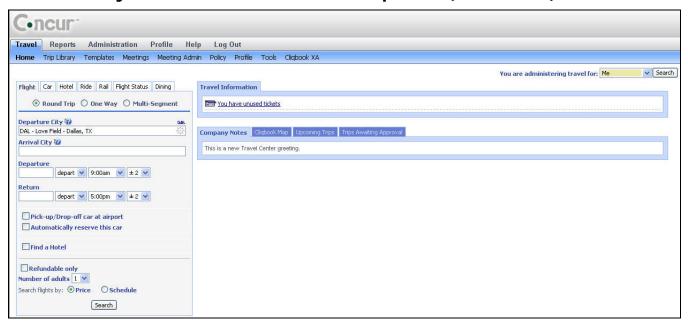
Section 1: Travel Center

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...

 On the Travel Center homepage, click the Profile link on the grey menu bar at the top of the screen.

- 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**.

Additional Information

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**.

To change your password, you need to know your old or temporary password.



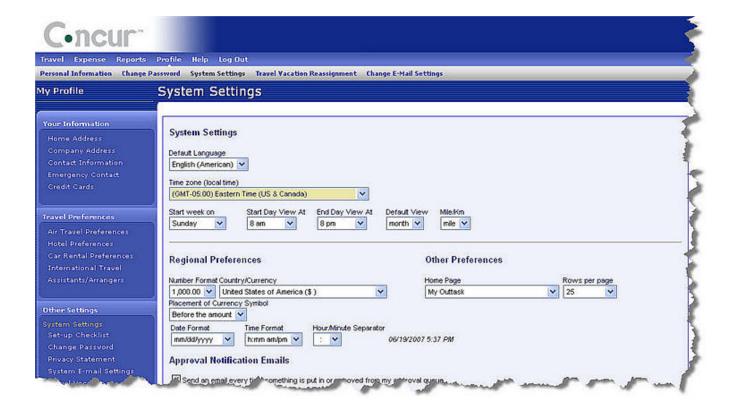
Step 2: Change your Time Zone, Date Format, or Language

How to...

- 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**.
- 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...

- 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.

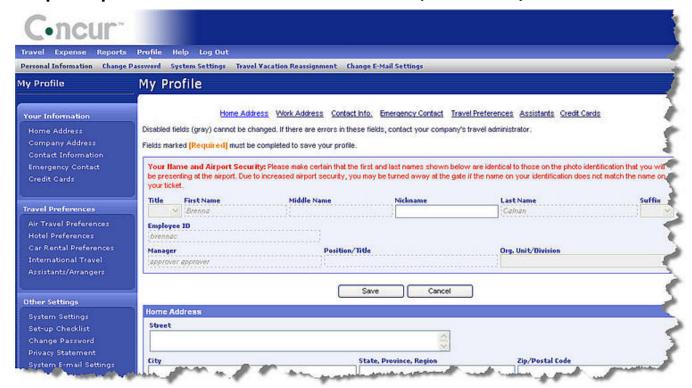
If you cannot edit these fields, contact your travel agency or travel manager to make changes.

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...

- On the Travel Center homepage, click the Profile link on the grey menu bar at the top of the screen.
- 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.

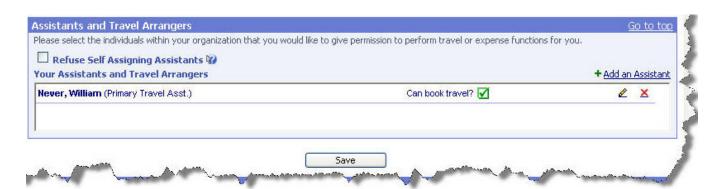
Additional Information

Use **Assistants & Travel Arrangers** to allow your travel arranger to view and modify your profile or book travel and trips on your behalf.

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...

- Click the Flight tab at the left side of the screen.
- 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.
- 4. Click in the **Departure** and **Return** date fields and select the appropriate dates from the calendar.
- If you need a car, select the Pickup/Dropoff car at Airport checkbox.

6. If you need a hotel, select the **Find a Hotel** checkbox.

7. If also booking for a companion, select the number from **the Number of Adults** drop down.

Additional Information

If you have a Car, Hotel, Limo, or Rail to book without airfare, use the corresponding tabs.

You can also select your travel cities from the **Clipbook Map** by clicking on the city.

When you type in a city, airport name, or airport code, Cliqbook will automatically search for a match.

You can also select the appropriate **Departure** and **Return** times and date range. Cliqbook searches before and after the time you select.

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.

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.

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...

 Click the Search for Flights By button to view the flight results by Price or by Schedule.

Additional Information

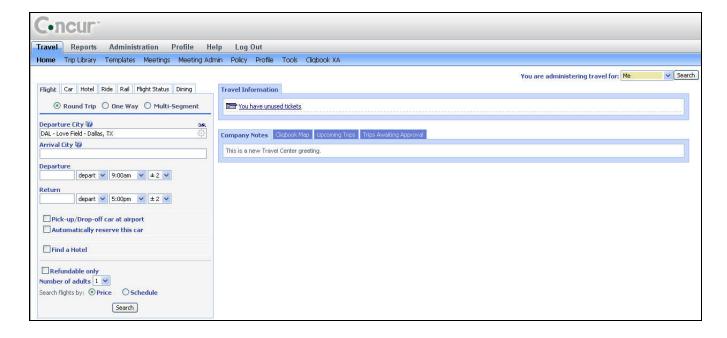
Select **Search by Price** to find fares in Coach/Economy.

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.

Click the Search button.



Step 1: Make a Flight Reservation (Continued)

How to...

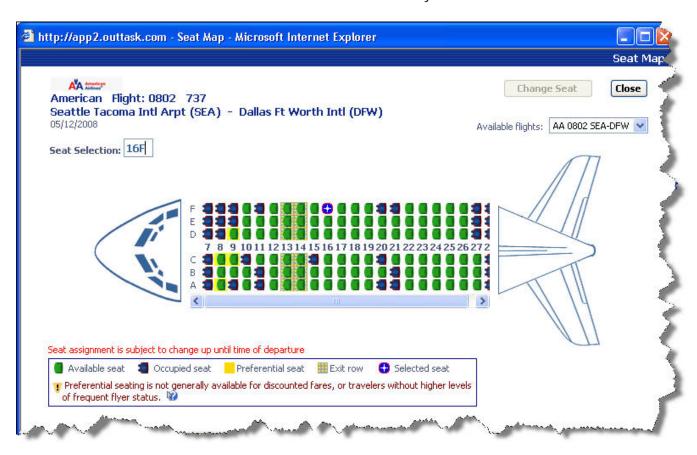
- 10. After you choose your flight, click the **Select Seat** button next to the flight.
- Select any green (unoccupied) seat and position the cursor over a seat to see the seat number.

Additional Information

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.

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.

Click the **Reserve** button to select your airfare.

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.

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...

- 1. If you specified that you need a car on the **Flight** tab, you will see car results for the car search.
- Select the appropriate rental car and then click the **Reserve** button.

Additional Information

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.

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...

- To filter by hotel chain, click the Hotel Chain link and then select the chains you want to view.
- 2. To filter by hotel amenities, click the Hotel **Amenities** link and then select the appropriate amenity options.
- 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.
- 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.

Additional Information

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**.

Your company's preferred hotels are displayed as pink dots.

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.
- Enter your trip information in the Trip Name and Trip Description fields.
- 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

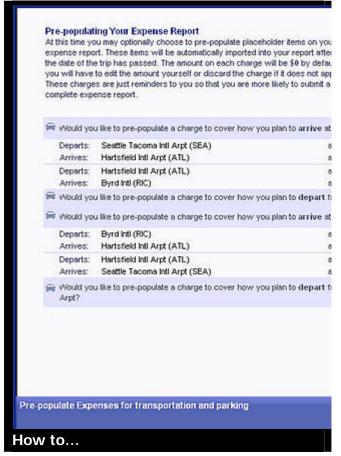
How to...

- 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.

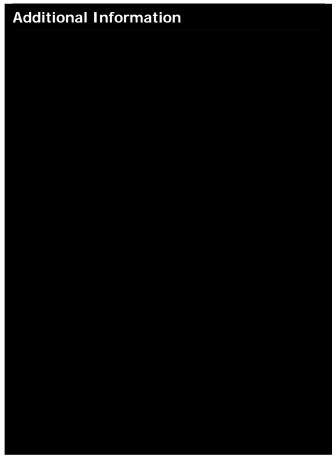
Additional Information

After you have completed the reservation, a window appears where you can enter the information to prepopulate 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.



- 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.



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

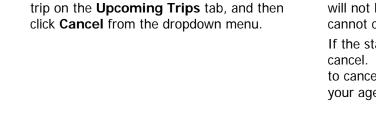
From the **Itinerary** page, you can:

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

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.



4. To cancel your trip, click the name of the

Section 5: Concur Cliqbook Travel Action Buttons and Icons

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