



Concur Travel User Guide June 2022

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Travel Booking Overview:

- ▶ **Airfare, lodging and rental cars are to be booked through Concur Travel (preferred) or a TSI USA travel agent, ITT's travel management company.**
- ▶ **Airfare:** Is billed to your corporate credit card. Once booked, airfare will appear as an available expense in Concur Expense. The traveler will need to add the respective airfare along with the other expenses associated with the same trip into a report prior to submitting it in Concur Expense.
- ▶ **Lodging:** Hotels are paid by company credit card. At the end of the hotel booking process in Concur Travel, the traveler will be prompted to select their payment preference. Hotel expenses must be reconciled in Concur Expense and the folios (receipts) must be uploaded/attached in order to support the expenses. If e-receipts are enabled in the travel profile, hotels with the capability to do so will send the respective folios directly to Concur Expense as available receipts.
- ▶ **Car Reservations:** Rental cars are paid by company credit card. At the end of the travel booking process, the payment preference will be selected. Hertz, National and Enterprise are the preferred suppliers. If e-receipts are enabled in the travel profile, the receipt will appear in Concur Expense as available receipts. If not, the traveler must upload/attach the final receipt into Concur Expense.



How to Access the ITT Travel Portal

How to Access ITT Concur

How to Set Up Your Travel Profile

How to Book Travel

See Upcoming Trips or Trip Library

Helpful Information

- ITT's Travel Portal

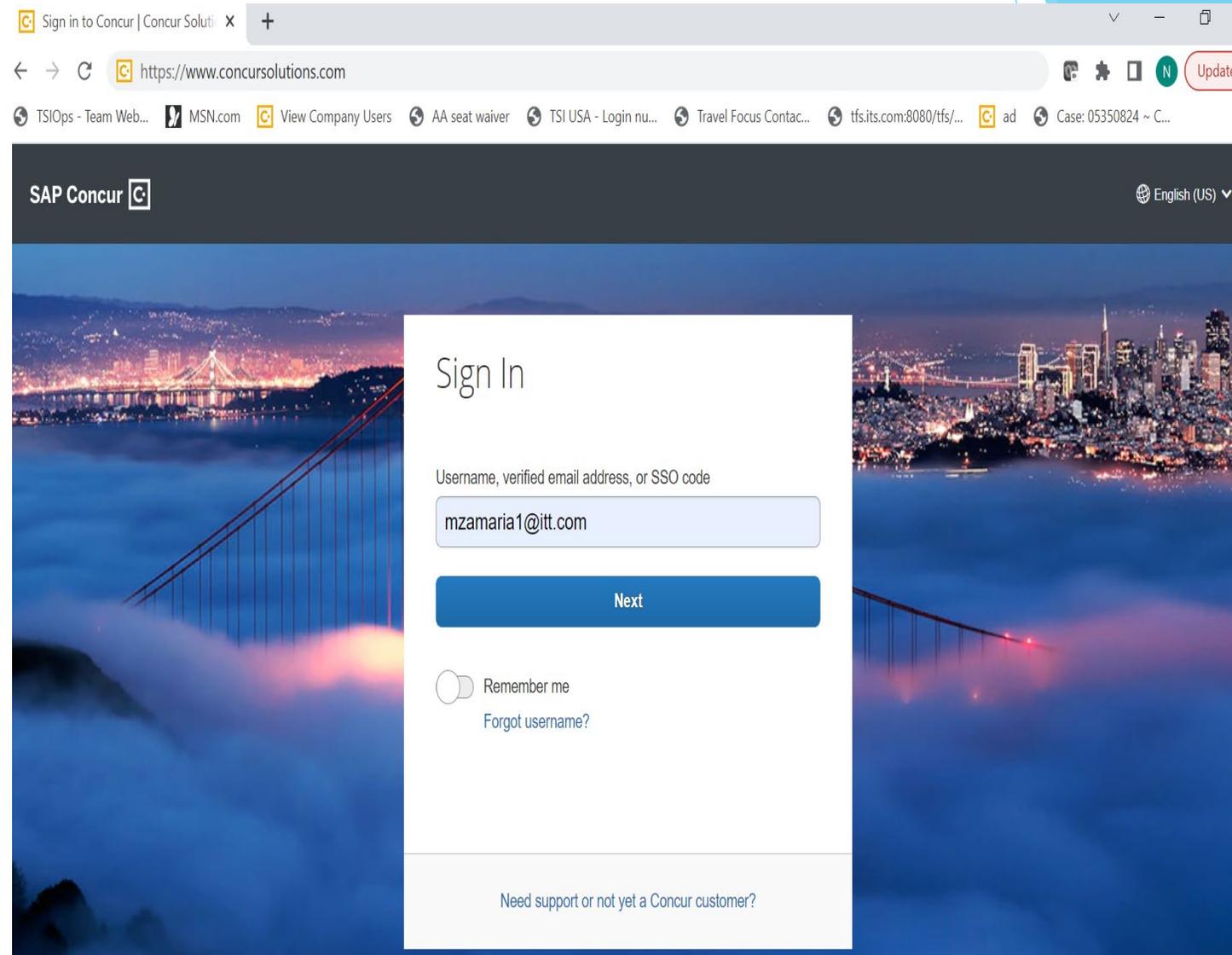
<http://www.tsiusa.com/itt/index.htm>

The screenshot shows a web browser displaying the ITT Travel Portal. The browser's address bar shows the URL www.tsiusa.com/itt/index.htm. The page features the ITT logo and a navigation bar with links for Home and Contact Us. The main content area is divided into several sections:

- Travel Tools:** Includes links for Online Flight Check-in Services, Turbulence Forecast, and Visa/Passport Assistance Account.
- Help, Tips, & Tricks:** Includes links for Concur Helpful Tips, Concur User Guide, ITT Concur Quick Reference, FAQ's, and Ultimate Guide to Airline Fees.
- TSI USA Reservations:** Provides contact information for reservations, including the email itt@tsiusa.com, phone number 866.903.0036, and 214.915.9195.
- TSI USA Online Technical Support:** Provides contact information for technical support, including the email onlinesupport@tsiusa.com, phone number 800.627.2987, and operating hours from 7:00am to 5:00pm PST.
- Client Communications:** Includes links for Travel Advisories, Meetings and Group Services, and Client Communications.
- E-mail Reservations:** Provides information on how to request travel arrangements through a simple form.
- Login to Concur:** A button with a dropdown menu for Forgot Username and Forgot Password.

Concur Travel and Expense

- Log into Concur at www.concursolutions.com



Your Concur Travel Profile

- Before travel can be booked, you must update your Profile
- Make sure your name is the same as it appears on your Driver's License (TSA requirement for commercial flights). If it does not match, please contact your manager as it'll need to be changed in Workday
- Fill in all required fields including your date of birth located under TSA Secure Flight in the Travel Preferences section along with items such as loyalty reward numbers, seat selection preferences, etc.
- Emergency contact information although not required should be filled in as well

If you do not see the Travel tab then you do not have access to book travel and will need your manager to fill out a Profile Request form. You must update your Profile.

Click on Profile, then click on Profile Settings

The screenshot displays the SAP Concur user interface. At the top, the navigation bar includes the SAP Concur logo, a 'Travel' tab (circled in red), and other tabs like 'Expense', 'Reporting', and 'App Center'. On the right side of the navigation bar, there are links for 'New Theme', 'Administration', and 'Help', along with a 'Profile' dropdown menu (circled in red) containing a user icon. Below the navigation bar, the user's name 'Nannette Pritchett' is displayed, with a 'Profile Settings' link (circled in red) and a 'Sign Out' button. A dropdown menu is open, showing options for 'Acting as other user' with three radio buttons: 'Act on behalf of another user' (selected), 'Act as user in assigned group (Proxy)', and 'Book travel for any user (Self-assign)'. Below these options is a search box labeled 'Search by name or ID' and buttons for 'Cancel' and 'Start Session'. The main content area is divided into sections: 'TRIP SEARCH' with a 'Mixed Flight/Train Search' form, 'COMPANY NOTES' with a 'Concur Training Toolkit' link, and 'MY TASKS' with two task cards: '03 Available Expenses' and '00 Open Reports'.

- Click **Personal Information**
- At the next screen complete as much as possible

The screenshot shows the CONCUR user interface. At the top, there is a navigation bar with the CONCUR logo and menu items: Requests, Travel, Expense, Invoice, Approvals, and App Center. On the right side of the navigation bar, there are links for Administration and Help, and a user profile dropdown menu. Below the navigation bar, there is a sub-navigation bar with the following options: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. The main content area is titled "Profile Options" and contains a list of settings categories. A blue callout box with a white arrow pointing upwards is positioned over the "Personal Information" link in the list. The callout box contains the text "Click Personal Information." The "Personal Information" link is highlighted in blue. The "Personal Information" category description reads: "Your home address and emergency contact information." Other categories include "System Settings", "Contact Information", "Travel Settings", "Request Settings", and "Expense Settings".

Administration | Help

CONCUR Requests Travel Expense Invoice Approvals App Center Profile

Profile Personal Information Change Password System Settings Mobile Registration Travel Vacation Reassignment

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel
- Intern
- Frequ
- Assist

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**
How can we contact you about your travel arrangements?
- Travel Assistants**
Travel Assistants can allow other people within your company to book trips and enter expenses on your behalf.
- Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Mobile Registration**
Set up access to Concur on your mobile device.

Click Personal Information.

- Make sure that the first, middle, and last names in Concur are identical to your Driver's License. *The airline ticket must match your ID at the TSA checkpoint.*
- If they are not identical, let your manager know as changes will need to be made in Workday.
- Required fields are marked in red although it's recommended you complete your entire Travel Profile.
- Sections for Loyalty reward numbers, seating preferences for flights, emergency contact information, etc. are located within the personal information area as well.
- Click SAVE when done.

My Profile - Personal Information

Jump To:

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

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.



Important Note

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

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
<input type="text" value=""/>	<input type="text" value="Nannette"/>	<input type="text" value="Mary"/>	<input type="text" value=""/>	<input type="text" value="Pritchett"/>	<input type="text" value=""/>

Company Information

[Go to top](#)

Employee ID

Manager

Org. Unit/Division

Employee Position/Title

Traveler Misc Notes:

Frequent Flyer Status

Frequent Flyer Status



[Sign into e-Receipts under ALERTS](#)

[Booking Travel](#)

[View Upcoming Trips](#)

[View Past Trips in Trip Library](#)

This will be your home page. Under Travel Alerts please sign up for e-receipts. This will help when doing your expenses

The screenshot displays the Triplt user interface. On the left, the 'TRIP SEARCH' section includes a user profile 'Booking for myself | Book for a guest', icons for flight, car, hotel, and train, and a 'Mixed Flight/Train Search' filter with 'Round Trip', 'One Way', and 'Multi City' options. A 'From' field is partially visible. On the right, the 'ALERTS' section contains three messages: 1) A blue information icon followed by 'Triplt creates a schedule with all your travel details in one place, accessible on Android or iPhone. Simply connect your Concur account to Triplt. [Connect to Triplt] Not right now'. 2) A red warning icon followed by 'Your credit card New Card lacks a billing address. Some airline reservations require this information. [Edit]'. 3) A blue information icon followed by 'You haven't signed up to receive e-receipts. [?] Sign up here'. The third message is highlighted in yellow, and a red arrow points from the text 'Sign up here' to the 'Sign up here' link. Below the alerts is the 'COMPANY NOTES' section.

Book a Flight

- To begin, go to the Concur home page and click the Travel tab at the top of the page.
- Click the airplane icon, select and enter information into the proper fields, click search to review your flight options.
- Flight will be purchased against your corporate card.

The screenshot displays the SAP Concur interface. At the top, the navigation bar includes 'SAP Concur', a logo, and three tabs: 'Travel' (highlighted with a red circle), 'Expense', and 'Expense'. Below the navigation bar, there are four menu items: 'Travel', 'Arrangers', 'Trip Library', and 'Template'. The 'Travel' menu item is selected. Below the menu items, there are two options: 'Booking for myself' and 'Book for a guest'. Below these options, there are five icons: an airplane and train icon (highlighted with a red box), a car icon, a bed icon, and a train icon. Below the icons, there is a warning message: 'Fare is subject to change until ticket has been issued / purchased.' Below the warning message, there is a section titled 'Mixed Flight/Train Search'. This section contains three tabs: 'Round Trip', 'One Way', and 'Multi City'. Below the tabs, there are two input fields: 'From' and 'To'. Each input field has a placeholder text: 'Departure city, airport or train station' and 'Arrival city, airport or train station'. Below each input field, there are two links: 'Find an airport' and 'Select multiple airports'. At the bottom of the form, there is a red 'Search' button.

TIP:

If needing to book all 3 segments of travel you have an option to mark the boxes below the flight information. The system will flow to those travel segments once a flight itinerary has been chosen.

Fare is subject to change until ticket has been issued / purchased.

Mixed Flight/Train Search

Round Trip | One Way | Multi City

From DAL - Dallas Love Field - Dallas, TX
[Find an airport](#) | [Select multiple airports](#)

To STL - St Louis Lambert Intl Airport - St Louis, MO
[Find an airport](#) | [Select multiple airports](#)

Depart 06/25/2021 depart Anytime

Return 06/26/2021 depart Morning ± 2

Pick-up/Drop-off car at airport
 Automatically reserve this car
 Find a Hotel

Search within 5 miles from
 Airport Address
 Company Location Reference Point / Zip Code

Once you choose your departing and returning flights you'll get this screen.

This is what you have selected

This is your cost

Selected Fare

American Airlines¹

10:20a DFW → 11:59a STL	Nonstop	1h 39m
11:30a STL → 01:20p DFW	Nonstop	1h 50m

¹ American Airlines 3908 operated by ENVOY AIR AS AMERICAN EAGLE

Remove x
\$269.60

View Fares

Least Cost Logical Fare

Show all details v

Click
on
view
fares

After selecting View Fares another screen will populate showing more Air Carrier options. Review closely because they might be cheaper but longer layovers, inconvenient times, etc. Scroll back up and click on the box with the green arrow.

Select Seat Assignment- Please note ITT Policy does not allow to select upgraded seats.

Reserve and click Continue

Renting a Car

- To begin, click the car icon and enter the pick-up/drop-off dates.
- Hertz is your ITT preferred vendor and should be your first option.
- Rental cars are to be charged to your corporate card. Ask for a receipt at the time of drop-off as it will be required when submitting your Expense report.
- Keep in mind that our contract with ITT's preferred car rental agency includes Collision Damage Waivers (CDW), so you should decline this additional coverage when offered.
- Do not choose the vendor's pre-pay fuel option. Rentals must be refueled prior to drop-off. Obtain receipts as they will be required when submitting fuel expenses for reimbursement.

Note: Rental Car Insurance is not to be accepted by traveler through any rental car vendor.

Car Search

Pick-up date 12:00 pm ▾

Drop-off date 12:00 pm ▾

Pick-up car at

Airport Terminal Off-Airport

Please enter an airport.

Return car to another location

[▶ More Search Options](#)

Search

Booking Your Hotel

- Select the bed icon
- Enter check-in and check-out dates
- Enter city/state, address or you can choose company location
- Hit Search and view available hotels
- You must choose ITT Rates when offered.
- Select your room type

Booking for myself | Book for a guest

✈️ 🚗 🚗 🛏️ 🚗 🚗

Hotel Search

Check-in Date: 07/26/2022 | Check-out Date: 07/27/2022

Search within 5 miles from

Airport | Address

Company Location | Reference Point / Zip Code

Please choose a company location.

Control Technologies - Orchard Park (Orchard Park, NY) ▼

Only show results containing:

Search

1. Hampton Inn Buffalo South I-90 \$101
1750 Ridge Rd, West Seneca, NY 14224 [Map it](#) **Hide Rooms**

4.33 miles ★★☆☆☆

Most Preferred Hotel for ITT Corporation [Hotel details](#)

Room Options

Itt Corporation -tier 2 Comm L - 1 King Bed Study With Sofabed Nonsmoking Hdtv/free Wi-fi/hot Breakfast Included (Sabre) Rules and cancellation policy	✓	\$101
Itt Corporation -tier 2 Comm L - 2 Queen Beds Nonsmoking Hdtv/free Wi-fi/hot Breakfast Included (Sabre) Rules and cancellation policy	✓	\$101
Itt Corporation -tier 2 Comm L - 1 King Mobility Access Tub Suite Nonsmoking Kitchen/hdtv/work Area (Sabre) Rules and cancellation policy	✓	\$101

Select a Payment Method

- Your corporate card should be defaulted for payment.
- Put a check mark after reviewing the cancellation policy.
- Please note the cancellation policy before checking box.
- Review Hotel and Continue.

SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

KeyBank MasterCard (...1111)  [Edit](#) | [Add credit card](#)

* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Hampton Inn Buffalo South I-90 

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

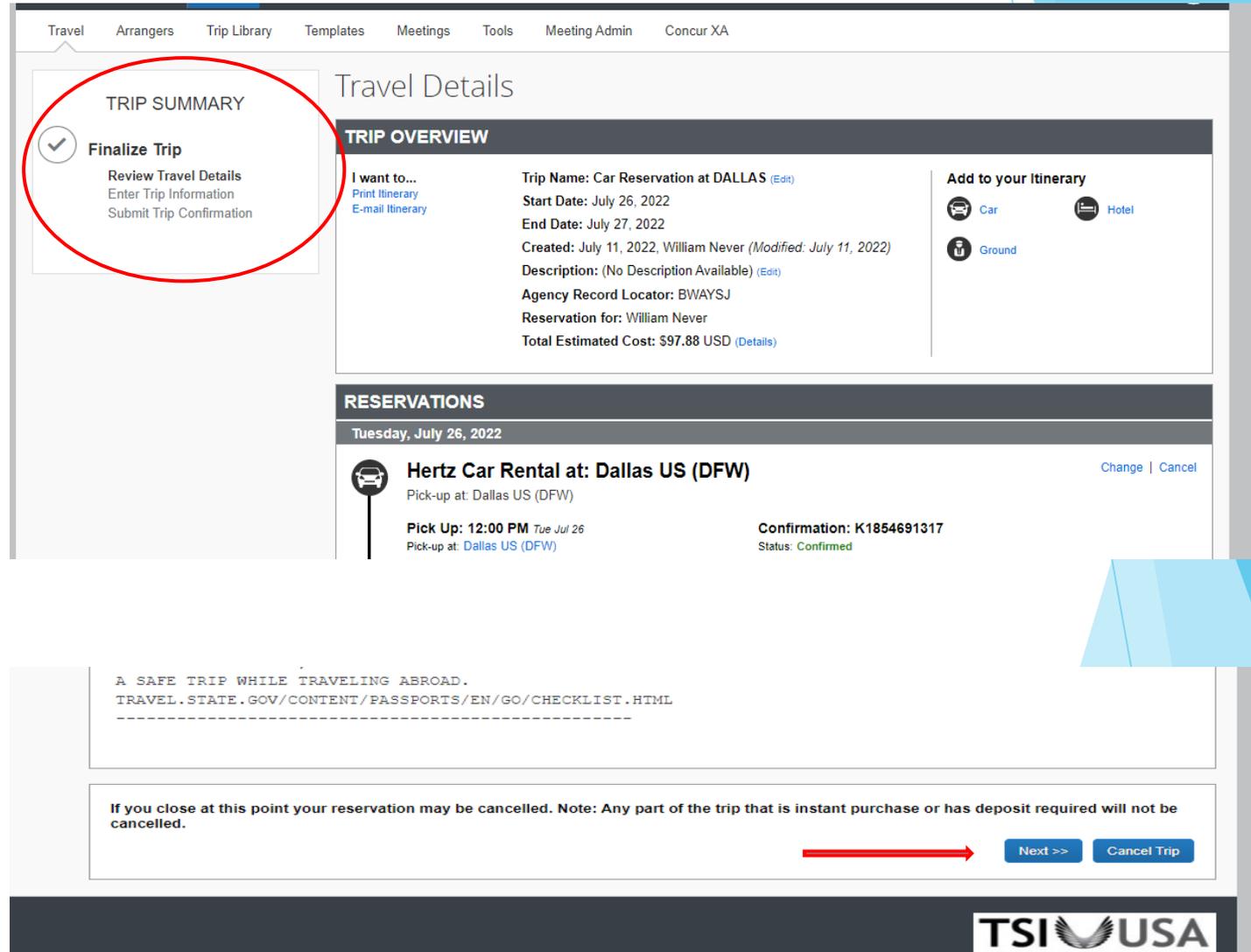
RATE: USD 101.00
TOTAL RATE: 114.89 USD
EXTRA PERSON: 0.00 USD - Extra adult charge

* I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

Checking out

- Trip Summary will advise what portion of the booking process you are on.
- Click “next” on every check out page.
- Failure to complete the booking process will result in your reservation being auto cancelled by Concur.



The screenshot displays the Concur Travel Details page. The navigation bar at the top includes: Travel, Arrangers, Trip Library, Templates, Meetings, Tools, Meeting Admin, and Concur XA. The main content area is divided into several sections:

- TRIP SUMMARY**: A sidebar on the left with a red circle around the 'Finalize Trip' step, which includes sub-steps: Review Travel Details, Enter Trip Information, and Submit Trip Confirmation.
- Travel Details**: The main heading for the current page.
- TRIP OVERVIEW**: A section containing trip information:
 - I want to...**: Print Itinerary, E-mail Itinerary
 - Trip Name**: Car Reservation at DALLAS (Edit)
 - Start Date**: July 26, 2022
 - End Date**: July 27, 2022
 - Created**: July 11, 2022, William Never (Modified: July 11, 2022)
 - Description**: (No Description Available) (Edit)
 - Agency Record Locator**: BWAYSJ
 - Reservation for**: William Never
 - Total Estimated Cost**: \$97.88 USD (Details)
- Add to your Itinerary**: Includes icons for Car, Hotel, and Ground.
- RESERVATIONS**: A section for Tuesday, July 26, 2022, featuring:
 - Hertz Car Rental at: Dallas US (DFW)** with 'Change' and 'Cancel' links.
 - Pick-up at**: Dallas US (DFW)
 - Pick Up: 12:00 PM Tue Jul 26** and **Pick-up at: Dallas US (DFW)**
 - Confirmation: K1854691317** and **Status: Confirmed**

At the bottom of the page, there is a travel advisory link: [A SAFE TRIP WHILE TRAVELING ABROAD. TRAVEL.STATE.GOV/CONTENT/PASSPORTS/EN/GO/CHECKLIST.HTML](https://TRAVEL.STATE.GOV/CONTENT/PASSPORTS/EN/GO/CHECKLIST.HTML). Below this is a warning: "If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled." At the bottom right, there are two buttons: "Next >>" (highlighted with a red arrow) and "Cancel Trip". The TSI USA logo is visible in the bottom right corner.

- Confirmation #s will be shown well before the travel arrangements are actually finalized.
- Trips have not been finalized until "FINISHED" is displayed at top of the page.

The screenshot displays the SAP Concur Travel interface. At the top, the navigation bar includes 'SAP Concur', 'Travel', 'Approvals', 'Reporting', and 'App Center'. Below this, a secondary navigation bar lists 'Travel', 'Arrangers', 'Trip Library', 'Templates', 'Meeting', 'Tools', 'Meeting Admin', and 'Concur XA'. The main content area features a 'TRIP SUMMARY' section with a 'Finished!' status, indicated by a checkmark icon. A green circle highlights the 'Finished!' text. Below the summary, the 'Trip Record Locator: KVVYTI' is displayed. A message states: 'This trip complies with your travel policy. Your itinerary has been saved. TSI USA (ITT Industries USA) will service your itinerary. Please Note: Fares are not guaranteed until tickets are issued and are subject to change without notice.' The 'Travel Contact Information' section provides the phone number: '7:00A - 7:00P: 866-903-0036 OR 214-915-9195'. The 'TRIP OVERVIEW' section includes the ITT logo and details: 'Trip Name: Trip Reservation', 'Start Date: July 26, 2022', 'End Date: July 27, 2022', 'Created: July 11, 2022, William Never (Modified: July 11, 2022)', 'Description: (No Description Available)', 'Select Travel Type: Business', 'Agency Record Locator: KVVYTI', 'Reservation for: William Never', 'Total Estimated Cost: \$65.93 USD', 'Agency Name: TSI USA (ITT Industries USA)', and 'Daytime Phone: 866-903-0036 OR 214-915-9195'. The 'RESERVATIONS' section is titled 'Tuesday, July 26, 2022' and lists a 'Hertz Car Rental at: Dallas US (DFW)' with details: 'Pick-up at: Dallas US (DFW)', 'Pick Up: 12:00 PM Tue Jul 26', 'Pick-up at: Dallas US (DFW)', 'Number of Cars: 1', 'Confirmation: K1850769927', 'Status: Confirmed', and 'Rate Code: CR'.

Concur Mobile App

- Book Travel
- Cars reserved at airport locations only, not offsite facilities
- Take picture of receipts and download to Concur Expense
- Email receipts from desktop to Receipts@concur.com
- Apple and Play Store – SAP Concur

Add the CONCUR Mobile App

- Login using your login ID and password.



1:22 32%

concursolutions.com

SAP Concur 

Sign In

Username, verified email address, or SSO code

Next

Remember me

[Forgot username?](#)

The screenshot shows a mobile browser interface for the SAP Concur login page. At the top, the status bar shows the time 1:22 and battery level at 32%. The address bar displays 'concursolutions.com'. The main heading is 'SAP Concur' with a yellow square logo containing a white 'C'. Below this is the text 'Sign In'. A text input field is labeled 'Username, verified email address, or SSO code'. Below the input field is a blue button labeled 'Next'. At the bottom, there is a 'Remember me' toggle switch (currently off) and a link for 'Forgot username?'.

Notes: Travelers may keep the miles / points earned through company travel.

- **Airlines:**

- Sign up with commercial airline to earn points
- Enrollment is quick, easy and immediate

- **Rental Cars:**

- Sign up with Hertz #1 Gold for greater access to limited car availability
- [Join the Hertz #1 Gold Club](#)
- Sign up for National Emerald Club
- [Enroll to Enterprise Plus | Enterprise Rent-A-Car](#)

- **Hotels:**

- IHG is a preferred partner for ITT. To join IHG (Holiday Inns, Crowne Plazas, InterContinental Hotels, etc.) go to <https://www.ihg.com/rewards>

Key Contact Info for ITT Concur

Areas	Contact Information
T&E Policy Questions	Annemarie.Lewis@itt.com
Travel Booking (TSI-USA and Concur Travel Online Booking)	Phone: 214-915-9195 / 866-903-0036 Email: itt@tsiusa.com Portal: http://www.tsiusa.com/itt/index.htm
Concur Expense / Expense Report Submission and Approval	ConcurHelpDesk2@itt.com