Concur Travel Service Guide Multi-User Clone / Share Trip

Overview

Concur's ability to clone and share trips was ideal for the travel arranger to clone for a small number of travelers, but did not provide an effective solution for a large group. The Multi-User Clone feature will allow an arranger to clone an already reserved trip (Concur Travel & Expense or agent- originated) for multiple travelers (unlimited). It will create a unique PNR or reservation for each traveler and copy the LLF and finishing requirements.

- Multi-segment clone is different from the standard clone in that we are cloning the fare basis code of the original trip for all new trips.
- The single clone feature clones the flights of the original trip but policy is applied and the user/arranger is taken through the booking process.
- With multi-user clone, policy (class of Service, airline preference, refund ability, etc.) is determined by the first trip only.
- If there is a change in class of service or fare during the multi-user clone, the clone will end and a report is sent to the arranger.

Due to this difference in functionality, we have grayed out the **Refundable** check box on the multi-user clone page as it serves no purpose.

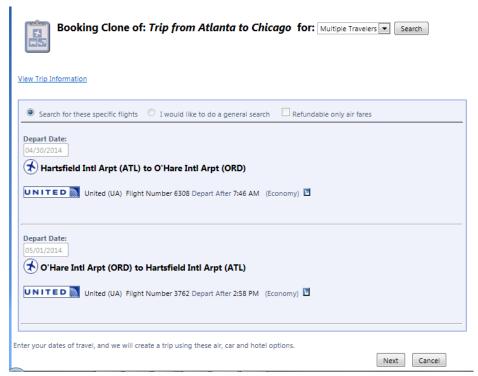
How it Works

Multi-User Clone

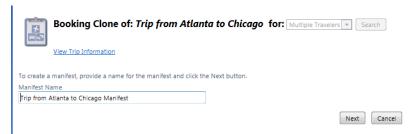
 In the Travel Center under Upcoming Trips, select a trip and click Clone Trip:



- 2. Select *Multiple Travelers* from the list (top right corner).
- 3. Select the appropriate radio button.
- 4. Select Refundable only air fares as applicable.
- 5. Click Next.

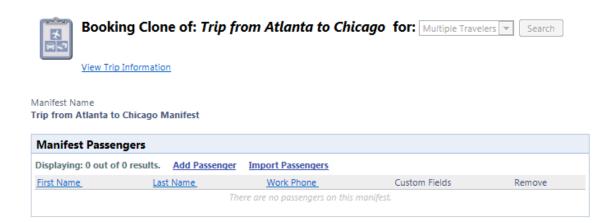


6. Name your manifest booking. Concur Travel & Expense will populate the Manifest Name field with the city pairs but you can change it:



Add/Import Passengers

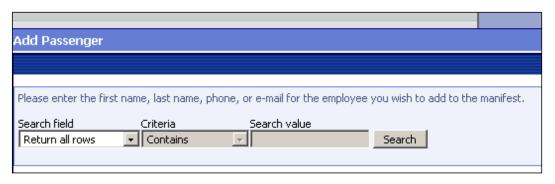
There are two ways to add travelers – add each individually or use an import tool:



Use Add Passenger

If you choose to add them individually, you can search the configuration database by first name, last name, phone, or e-mail.

1. To do so, click **Add Passenger**. The following page appears.



- 2. Enter the desired criteria. If using the Search field 'Return all rows', Concur will return a maximum of 300 rows in alphabetical order.
- 3. Click Search.
- 4. From the search results, select the desired passengers.

Once selected, you will be returned to the main page where there is an **Edit** link. You would click this link to populate the trip field data, if required.



Custom Trip Fields

During the multi-user clone creation process, some companies will need to provide custom field answers for the manifest passengers. If a trip field is required, the clone cannot be finished until every passenger's required trip fields have been completed.

If there are no custom trip fields, the manifest admin will see this:



If there is one or more required custom trip fields, the manifest admin will see an additional column called "Custom Fields". Each passenger will have a green check or red exclamation depending on whether their required trip fields have data. In the following example, the first passenger's required fields have been completed, but the second user's have not:



When the admin tries to click the "Finish" button to kick off the trip cloning process, they will see the following error message if there are passengers with incomplete required trip fields:



Previously, when creating a manifest trip, the only custom fields that were presented were those with both "Display at the start of booking" and "Display for Standard Trips" checked:



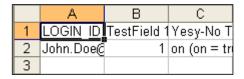
We now include fields that don't have "Display at the start of booking" checked. The only criteria used with this release are that "Display for Standard Trips" is checked.

Using Import Passengers

1. To use the import option, click **Import Passengers**. The following page appears.



2. Download the sample spreadsheet as instructed.



The sample spreadsheet contains the following columns:

- Login ID
- Column for each required trip question
- 3. Populate this data for each traveler.
- 4. When done, upload into Concur Travel & Expense. The following page appears.



- 5. Review the information for accuracy.
- 6. Select the check the box next to each person to be imported.
- 7. Click Add.

Form of Payment Choices

Once the users have been loaded, you must determine the form of payment for each traveler. You can use:

 The default form of payment in each user's profile or a specified form of payment if there is no default

- Only a specified form of payment
- Only the user's default form of payment
- Only the original trips FOP

Corporate or ghost cards are not considered unless specifically chosen by the arranger. The traveler's personal card choice in their Concur Travel & Expense profile takes precedence and a corporate ghost card is only available with options 1 and 2 and then would apply to all cloned users.

 Option 1: Traveler's air-default personal credit card is used. If unavailable (either the traveler has no credit cards in Profile or none of the credit cards are set for air-default), then a default credit card is used instead. All corporate ghost cards are available in the dropdown, regardless of any arranger or user restrictions.



• **Option 2:** Only use the default credit card. All corporate ghost cards are available in the dropdown, regardless of any arranger or user restrictions.

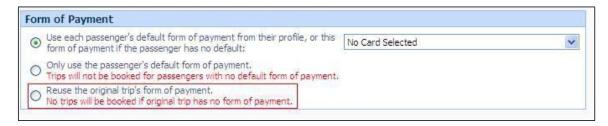


 Option 3: Only use traveler's air-default credit card is used and no corporate default card / ghost card is considered. If unavailable (either the traveler has no credit cards in Profile or none of credit cards are set for airdefault), then no trips will be booked for this traveler. Corporate ghost cards are not considered at all with this option.



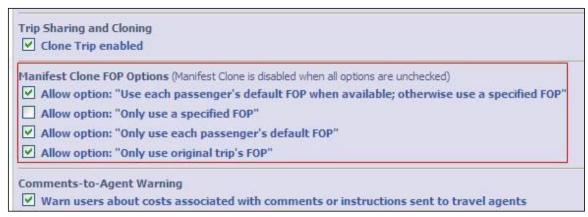
• **Option 4:** A user must have the multi-user clone permission to perform a clone, but the new section in the travel configuration drives which FOP options they can see.

On the Manifest create page, the selected FOP options are available for the trip arranger to choose. When allowed, a new FOP option, Reuse the original trip's form of payment, appears on this page:

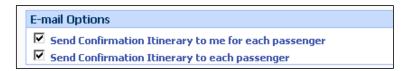


Configuration

The Manifest Clone FOP Options section appears in Travel System Admin. The last option allows the FOP from the original trip. We default all boxes on:



You must also select the options that apply in regards to e-mail options (both are defaulted to checked):



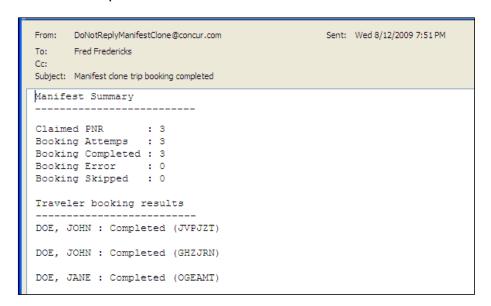
Once you click **Finish** on this page, you will see a list of the users you selected to clone, a link to view the original itinerary, the form of payment option selected, and the e-mail options selected.



In addition to this, the travel arranger will receive an e-mail with the status of everyone requested. The e-mail will include:

- Names and record locators of successful bookings
- Names of travelers who did not have successful bookings and why
- Summary of number attempted, number successful, etc.

E-mail Example:



New Manifests Tab

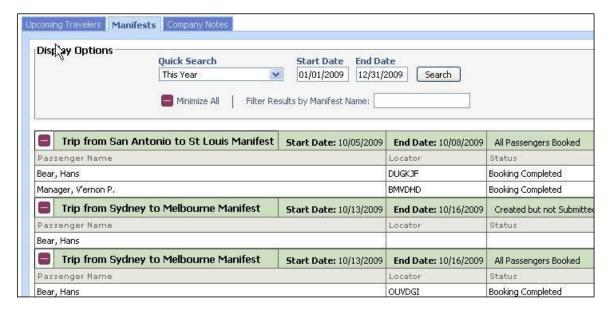
This tab is only visible to arrangers who are associated with a configuration with the multi-user clone feature activated.



Clicking the Manifests tab provides information that is very similar to that on the **Upcoming Travelers** tab.

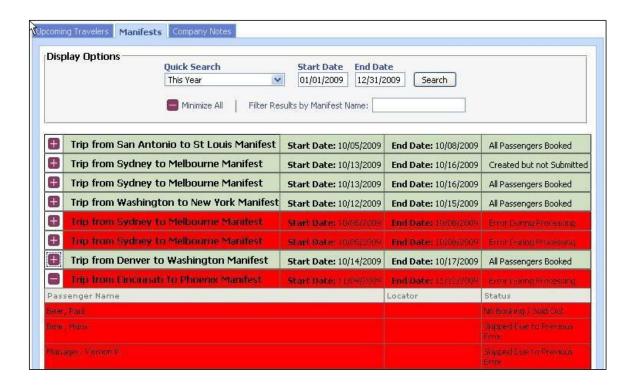


The date search form works the same way as on the **Upcoming Travelers** tab. The Filter Results by Manifest Name field uses the manifest names. Existing manifests appear in the list if the arranger has any manifests that fall within the specified date criteria.



Each manifest displays with the manifest name, the start and end date, and the manifest status. If the manifest has at least one passenger, the arranger will see a list of those passengers along with the record locator of each passenger's trip (if booked) and the passenger's status.

Manifests and passengers with errors during the booking process display with a red background:



Multiple Hotels

A clone trip may contain multiple hotels, or contain air and hotel. The following rules determine how Concur Travel & Expense conducts clone trip bookings and whether a clone trip PNR is created:

Air + Hotel(s):

- Air booking must be successful or no hotel bookings.
- One hotel booking failure stops all remaining hotel booking attempts, but already-booked air/hotel segments stay in PNR.
- No PNR is created when air booking fails.

Hotel(s) only:

- One hotel booking failure stops all remaining hotel booking attempts, but already-booked hotel segments stay in PNR.
- No PNR is created when the first hotel booking fails.

When a traveler's clone trip is partially booked (such as an air + hotel trip has only air segments booked), this booking is counted under **Booking Error** in the summary, but the booking result for that passenger is indicated as **Partially Completed** with a record locator. Here is an example of a notification e-mail in such a case:

Manifest clone trip booking completed (Denver Meeting Manifest)

Extra line breaks in this message were removed.

To:

Summary of Manifest - Denver Meeting Manifest

Booking Attempts Booking Completed : 3 Booking Error Booking Skipped

Traveler booking results

Smith, John: Error (Credit Card Expired) Newton, Paul: Completed (IMPTAQ) Never, William : Completed (NBFHG3)

Vernon, Bear: Completed (VHKHFT)

Add Airline Record Locator

In addition to the GDS record locator, the manifest clone now captures airline record locators during its current process. Each airline record locator associates to a carrier code in:

• The notification email, following GDS record locator:

```
Traveler booking results
Lee, Rick: Completed (DMQDEL - UA:R7BH4A AA:DMQDEL)
Lee, Ashley: Completed (DMUODZ - UA:R8CD7Q AA:DMUODZ)
```

 The new Airline Locators column on Travel Home Arranger's Manifest tab view:

Trip from Washington to Chicago (manifest clone test) Manifest	Start Date: 04/11/2011	End Date: 04/13/201	All Passengers Booked
Passenger Name	Locator	Airline Locators	Status
Lee, Rick		UA:R7BH4A AA:DMQDEL	Booking Completed
Lee, Ashley		UA:R8CD7Q AA:DMUODZ	Booking Completed

Support Hotel and Air Manifest Clone for Galileo

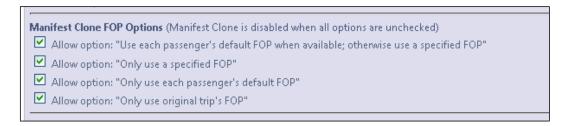
The multi-user/manifest clone feature was announced in the September 2009 release for Sabre, the October 2009 release for Apollo, and the December 2010 release for Amadeus. We are pleased to announce support for multi-user/manifest clone for Galileo with this release.

This feature applies to air and hotel segments only.

Configuration

To use this feature, the Travel System Admin follows these steps:

- 8. Navigate to Travel System Admin > Manifest Clone FOP Options (on the travel configuration page).
- 9. Select the appropriate form of payment options.



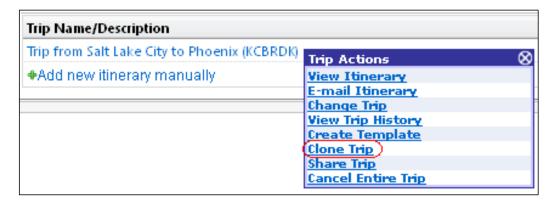
- 10. Navigate to Company Admin > User Permissions.
- 11. Add *Manifest Administrator* to the appropriate users.

GDS Scan Impact

This feature essentially "clones" an itinerary for as many travelers as are included on the manifest. It will use an amount of scans comparable to making multiple individual reservations in Concur Travel and may, in fact, save on search scans, since each reservation can be made without performing air and hotel searches.

Using the Feature

- 12. Make a reservation for air, hotel, or both.
- 13. Select **Clone Trip** from a confirmed trip.



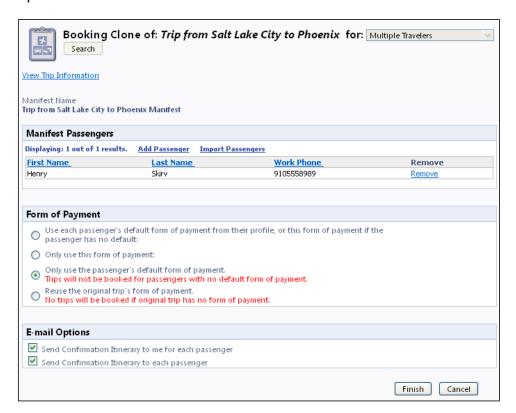
14. From the Booking Clone of list, select Multiple Travelers. Click Next at the bottom of the page.



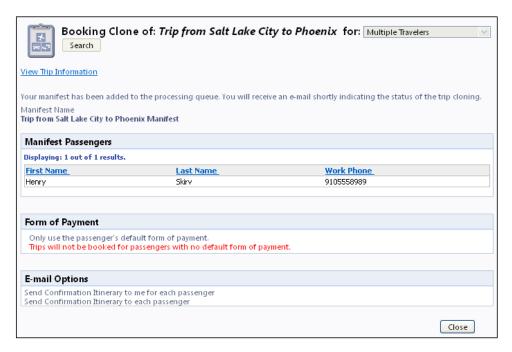
15. Modify the manifest name, if desired, and click Next.



16. Add the passengers in Manifest Passengers section, select the appropriate option on the Form of Payment section, and adjust email options as needed.



17. Once you click **Finish** on this page, you will see a list of the users you selected to clone, a link to view the original itinerary, the form of payment option selected, and the email options selected.



In addition to this, the travel arranger will receive an email with the status of everyone requested. The email will include:

- Names and record locators of successful bookings
- Names of travelers who did not have successful bookings and why
- Summary of number attempted, number successful, etc.

How to Share a trip

Sharing an itinerary sends an email to the invitee and adds a "Trip Invitation" alert on the invitee's Travel Center page that an itinerary has been shared to them. You can share a trip with any other user in your company.

Itineraries can be shared in the following ways:

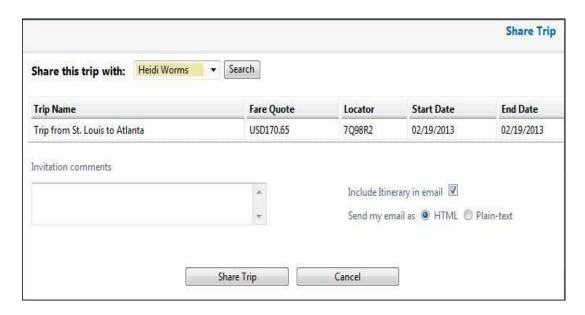
1. In the Travel Center, select a trip under Upcoming Trips and click the "View Itinerary" item. Then click on the "Share Trip" button:



2. In the Travel Center, select a trip under Upcoming Trips and click the "ShareTrip" item:



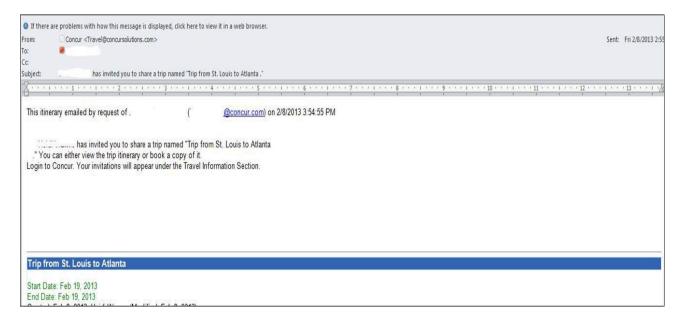
Select the user to share the itinerary to. You can share a trip with any other user in your company. Then click on the "Share Trip" button. A warning will appear if you are sharing an itinerary to another user and (a) the trip date for the shared trip conflicts with an existing trip's date for the user, (b) the user is in a different travel configuration, (c) the user has a different travel policy rule set, or (d) the trip is associated with a meeting:



A success popup will appear to inform the user that the itinerary was shared successfully:

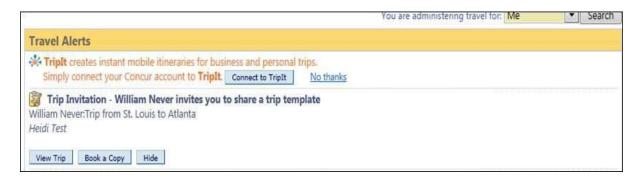


An e-mail will be sent to the user, inviting them to share the itinerary. The details of the shared itinerary will also be included in the e-mail:

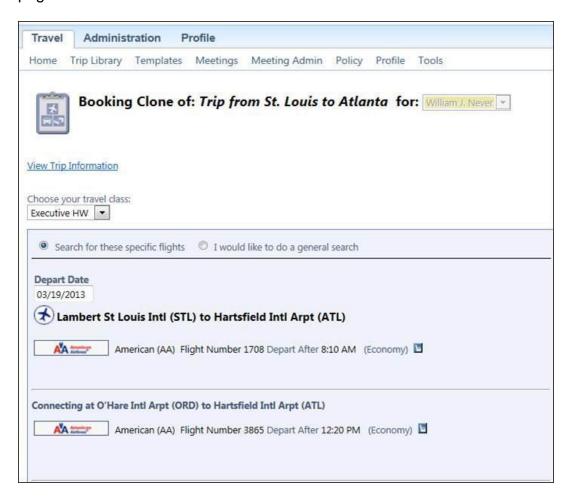


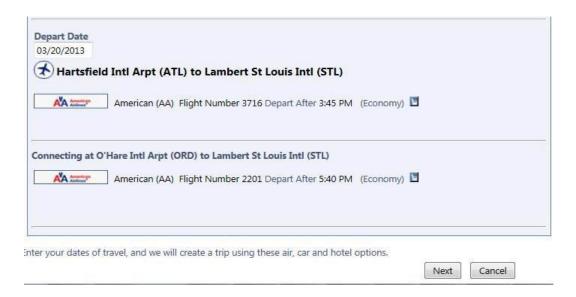
How to book a trip that has been shared

On the Concur Travel Center page, click the "Accept Invitation" button in the Travel Information tab:

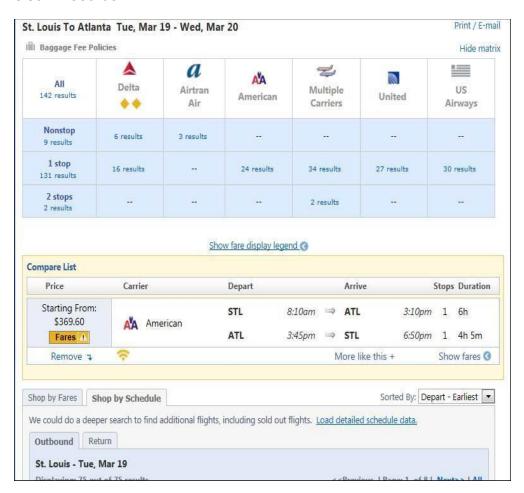


Then click on the "Book a Copy" button to book the itinerary. Dates are prepopulated so you just click on Next and you will be taken to the search results page.





The trip that matches will show in the results page but allows to pick something else if need be.



FAQ's

What types of trips are supported?

One-way, round trip and multi-segment itineraries are all supported. Direct connect, split ticketing, instant purchase, and mixed content (GDS + direct connect) trips are also supported.

TRAVELfusion, Rail, Park N Fly (airport parking), Open Table (dining), GGA (limo), and Ride Charge (taxi) are not supported with this version.

Only air and hotel itineraries are cloned. The original itinerary can contain a car reservation but it will be ignored during the clone process. There are no plans to support car rentals with this feature.

What types of travelers are supported?

This feature only applies to profiled travelers within the same configuration as the original trip user. Guest travel is not supported.

Are A La Carte options supported for Direct Connects? No.

Will travel policy be applied?

No. The assumption is that the policy of the first trip will be cloned. The LLF will be copied for each trip and is not recalculated for each booking. The clone will stop if the fare increases to alert the arranger and he/she can decide whether to proceed at a higher fare or look for something different.

Travel policy does not apply to class of service. If the original trip is in first class, the subsequent cloned trips will also be booked in first, regardless of the travel policy to which they are associated.

When is multi-user clone offered?

Similar to the clone and share-trip features, this is available for trips on hold, trips submitted for purchase, and ticketed itineraries. However, once a trip is cloned, it is automatically sent to ticketing.

What is the average processing time?

2-3 minutes per traveler. The e-mail summary is sent once every user has been processed.

What is added to the PNR?

The standard clone comment is added but nothing to note a multi-user clone. There are no data points in finishing either. If this is needed, please submit an enhancement request.

What could stop a multi-user clone?

point will be sent to ticketing.

The e-mail the cloner receives will detail the reservations that went through and those that did not. If a profile move fails, Concur Travel & Expense will skip that user and move onto the next one.

Again, the e-mail summary will identify if this occurs. Last, the clone will stop if there is a change in price.

Are the TSA requirements supported?

Yes, if the TSA requirements are set in the user's profile, they will be passed correctly. If they are not saved to the user's profile, they must be added by the agency or at the airport.

What GDS are supported for multi-user clone?

This feature is supported via Sabre, Apollo and Amadeus.

What happens if an arranger attempts to clone a trip where the fare basis has expired or no longer exists?

The arranger will not be able to perform the multi-user clone function. He/She will receive an error message stating "NO FARE FOR CLASS USED".