

IEEE Employee Concur Travel Quick Start Guide

Getting Started: Access IEEE Concur Expense & Travel

You can access Concur from anywhere on the [InsideIEEE](#) intranet by selecting 'Quick Links' at the top of any page, then selecting the "NextGen Expense Reimbursement ([Concur](#)) & Travel" link. Concur has IEEE single sign-on and does not require a separate username or password. You may also want to add this link to your bookmarks.

Note: All full-time employees have access to Concur Expense & Travel by default. Temporary employees currently are not granted access to Concur, per policy.

Review and Complete Profile Settings

Before you use Concur Travel for the first time, you will need to update your Travel profile. Even if you don't make any changes, you must save your profile before you can book a trip in Concur Travel. To access your Concur Travel Profile information:

1. Select 'Profile' in the upper right-hand corner of the SAP Concur IEEE home screen.
2. Select 'Profile Settings' to see the menu for Profile Update Options.
3. On the Profile Options page, select each Travel Setting to update and/or confirm the profile content.
4. Update the appropriate information in each section or page and click 'Save' on that screen section.

Note: Complete all required fields (including date of birth and gender) and confirm that the **name is your legal name that is on your travel document** (Driver's License or Passport.) Your name in your Concur profile is populated as a direct feed from HR's Fusion environment. If your name in Concur does not match your travel documents, you must contact HR directly to correct your name. Updates to your Concur record once Fusion is updated will be reflected within 7-10 business days within your Concur profile.

The screenshot displays the SAP Concur IEEE interface. At the top, the navigation bar includes links for Travel, Expense, Approvals, Reporting, App Center, and Administration. The user's name, Sherry Russ Sills, is shown in the top right corner. A red box labeled '1' highlights the 'Profile' dropdown menu. Below the profile menu, a red box labeled '2' highlights the 'Profile Settings' link. The main content area shows the 'Profile Options' page with a sidebar on the left containing links for Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards, and Travel Settings. A red box labeled '3' highlights the 'Travel Settings' link. The main content area on the right contains sections for Personal Information, Company Information, Credit Card Information, System Settings, Contact Information, and Setup Travel Assistants.

Once your information is entered and saved, it will be electronically routed to IEEE's corporate travel agency of record, World Travel, Inc. You are now ready to being your flight search.

Begin a Flight Search

1. Select "Travel" at the top left to exit the Profile page.
2. Click the Airplane/Train icon at the top of the page.
3. Click to Select a Flight Search type:
 - Round Trip • One Way • Multi-City
4. Enter the 'From' and 'To' details using the city name, airport code or train station name. Use "Find an Airport" if you are unfamiliar with the local area.
5. Click "Show More" to add additional option details.
6. Click the calendar in the 'Depart' and 'Return' fields to select dates (*shows inventory up to 331 days out.*).
7. Select 'Depart' or 'Arrive' in the drop-down boxes to direct the basis for the time search.
8. Select a portion of day or a specific hour in the 'Time' drop-down boxes.
9. Select a time range around your set time for the search. The wider the range of hours before and after your times (+3 field), the more flight options will be returned.
10. Click the down arrow next to the hour range field to reveal a timeline of non-stop flights (in green).
11. Check the car and/or hotel box, if desired.
12. Choose a Class option from the drop-down list. Economy is set by default and can be changed, as allowed.
13. Set a 'Search by' preference. Default is 'Price', the option is 'Schedule.'
14. Check the 'Specify Carrier' box to search by a specific carrier (e.g., United), if desired.
15. Click Search.

Note: If your Travel Profile was not completed, a notification window will appear after selecting 'Search' to advise that your profile must be completed before the system will allow you to continue.

Please refer to [IEEE's Expense Reimbursement Guidelines for Employees](#) for travel reimbursement guidelines.

The screenshot shows the SAP Concur Travel search interface. At the top, there are tabs for 'Travel', 'Arrangers', 'Trip Library', and 'Templates'. The 'Travel' tab is selected and highlighted with a red box and callout 1. Below the tabs, there are icons for different travel modes: Airplane, Train, Car, and Hotel. The Airplane/Train icon is highlighted with a red box and callout 2. Below the icons, there is a section for 'Mixed Flight/Train Search'. It includes buttons for 'Round Trip', 'One Way', and 'Multi-City'. The 'Round Trip' button is selected. Below these buttons, there are fields for 'From' and 'To', each with a 'Find an airport' link and a 'Select multiple airports' link. Below the 'To' field, there is a 'Search' button. Below the 'Search' button, there is a 'Show More' button. Below the 'Show More' button, there are fields for 'Depart' and 'Return'. Each field has a calendar icon, a date, a 'depart' or 'return' dropdown, a 'Morning' or 'Afternoon' dropdown, and a '± 3' field. Below the 'Depart' field, there is a '24 hour range' section with a timeline of non-stop flights (in green). Below the 'Return' field, there is another '24 hour range' section with a timeline of non-stop flights (in green). Below the '24 hour range' sections, there are checkboxes for 'Pick-up/Drop-off car at airport' and 'Find a Hotel'. Below these checkboxes, there are dropdowns for 'Class' and 'Search by'. The 'Class' dropdown is set to 'Economy class' and the 'Search by' dropdown is set to 'Price'. Below the 'Search by' dropdown, there is a 'Specify a carrier' checkbox. At the bottom, there is a 'Search' button.

Select Your Flights

Flight Search Results will appear based on your selected parameters, which will be outlined as a 'Trip Summary' on the top left side of the results page.

1. Select the 'Shop by Fares' or 'Shop by Schedule' tab above the list (click the alternate button to switch between views.) The 'Show matrix' button will show flights grouped by airline.
2. Changes to your search can be made in this window from the left panel, using the 'Change Search' down arrow or using the blue-dot toggle slides.

Shop By Schedule: (*'by Fares' is below*)

3. The default first choice will be 'Depart. Click the 'Select' button to choose a departure flight. The 'Return' choices will appear – click 'Select' to choose a return flight.
4. The full itinerary will appear at the top of the screen. Click 'View Fares' to see rates for each seat class.
5. Click the fare amount button to advance to the Review and Reserve Flight screen.

Fare Options	Free Checked Bags	Refundable		
ECONOMY (U) Rules Benefits/Services	0	No	✓	\$641.52
ECONOMY FULLY REFUNDABLE (U) Rules Benefits/Services	0	No	✓	\$730.51

Shop By Fares:

1. Click 'View Fares' to reveal the Depart and Return flights for that itinerary in all seat classes.
2. Click the fare amount button (from the list below the itinerary breakdown) to select the seat class and to advance to the Review and Reserve Flight screen.

Shop by Fares

Shop by Schedule

Flight Number Search

Sorted By: Price - Low to High

LIVE HELP online

Displaying: 62 out of 62 results.

Previous | Page: 1 of 7 | Next | All

06:00a EWR → 09:40a ORD 1 stop IAD 4h 40m
United 686, 1744

12:05p ORD → 03:29p EWR Nonstop 2h 24m
United 785

1

\$401.06

View Fares

Most Preferred Airline for IEEE [Show all details](#)

08:35a EWR → 02:36p ORD 1 stop CLE 7h 01m
United 1683, 600

12:05p ORD → 03:29p EWR Nonstop 2h 24m
United 785

\$401.06

View Fares

06:00a EWR → 09:40a ORD 1 stop IAD 4h 40m
United 686, 1744

12:05p ORD → 03:29p EWR Nonstop 2h 24m
United 785

\$401.06

Hide Fares

Most Preferred Airline for IEEE [Hide all details](#)

DEPART

✈ Mon, Oct 24 – Newark, NJ to Chicago, IL / 1h 13m layover in Washington, DC

Flight details

RETURN

✈ Thu, Oct 27 – Chicago, IL to Newark, NJ

Flight details

Fare Options

Free Checked Bags

Refundable

ECONOMY (W, W, V)

Rules

Benefits/Services

0

No

✓

\$401.06

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Review and Reserve a Flight

1. Review the Flights and Traveler Information on this page, using the 'Back' button at the bottom of the page for necessary flight changes and the Traveler Information 'Edit' button for profile updates.
2. Select a Frequent Flyer Program from the drop-down (list will include those in your profile) or add a program in the 'Enter Traveler Information' box.

REVIEW FLIGHTS

DEPART ✕ Mon, Oct 24 – Newark, NJ to Chicago, IL / 1h 13m layover in Washington, DC [Hide details ^](#)

Mon, Oct 24

06:00a EWR → 07:20a IAD	1h 20m	United 686 Boeing 757-200
Layover in Washington, DC	1h 13m	Washington Dulles Intl Airport

Mon, Oct 24

08:33a IAD → 09:40a ORD	2h 07m	United 1744 Boeing 737-800
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RETURN ✕ Thu, Oct 27 – Chicago, IL to Newark, NJ [Hide details ^](#)

Thu, Oct 27

12:05p ORD → 03:29p EWR	2h 24m	United 785 Boeing 737-800
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1 **ENTER TRAVELER INFORMATION**

Ensure all traveler information below is correct. ?

Primary Traveler [Edit](#) [Review all](#)

Name: Lorri Ann Cornett **Phone:** 732-562-6880 **Email:** l.cornett@ieee.org ▼

2 **Frequent Flyer Programs** [Add a Program](#)

For United

No Program selected ▼

3. Select your seats for each flight in the reservation.

Note: Seats that are considered upgrades (starred, premium seats) can ONLY be selected for those travelers with sufficient status in an airline's frequent traveler reward program such that those seats are available at no cost. If eligible, select your desired seat in the Travel Details page and continue the reservation. Seats requiring payment in the absence of a reward program benefit, CANNOT be selected in the SAP Concur Travel reservation process. This is an SAP Concur software programming limitation; IEEE nor World Travel, Inc. have any ability to change this system programming functionality. See the Travel Program [FAQs](#) for full details on selecting seat upgrades.

3 SELECT SEATS
Select your preferred seats, otherwise Concur will request them for you based on your Profile.

Flight	Seat
UA 686 Economy (W)	Select a seat
UA 1744 Economy (W)	Select a seat
UA 785 Economy (V)	Select a seat

4. Review the price summary and select a method of payment (add a credit card here, as necessary.)
5. Click 'Back' to make flight changes or 'Reserve Flight and Continue' to confirm the reservation.

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$337.54	\$63.52	\$401.06
Total Estimated Cost: \$401.06			
Total Due Now: \$401.06			

SELECT A METHOD OF PAYMENT
How would you like to pay?

There are no credit cards defined. [Add credit card](#)

* Indicates credit card is a company card

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

Finalize Your Trip - Review Travel Details

1. Review the Trip Overview section and note the deadline for confirming the reservation.
2. Add a car or hotel here, if desired.
3. Review the Reservations details for all trip segments and make changes to the flight/train selections or seat selections.
4. Add the trip segments to your itinerary, if desired.
5. Review the estimated cost to confirm it is as expected.
6. Click 'Next' to continue to Confirmation.

TRIP SUMMARY

Finalize Trip

Review Travel Details
Enter Trip Information
Submit Trip Confirmation

Travel Details

TRIP OVERVIEW

I want to...
[Print Itinerary](#)
[E-mail Itinerary](#)

Trip Name: Trip from Newark to Chicago [\(Edit\)](#)

Start Date: December 06, 2022

End Date: December 09, 2022

Created: December 05, 2022, Lorri Cornett *(Modified: December 05, 2022)*

Description: (No Description Available) [\(Edit\)](#)

Agency Record Locator: L22SVA

Passengers: Sherry Russ Sills

Total Estimated Cost: \$392.04 USD [\(Details\)](#)

Airfare must be ticketed by: 12/05/2022 11:00 PM Eastern

[Change frequent flyer program](#)

Add to your Itinerary

Car Hotel

Booked outside Concur? Enter your trip manually or connect with TripIt

RESERVATIONS

Tuesday, December 06, 2022

Flight Newark, NJ (EWR) to Chicago, IL (ORD) [Change](#) | [Cancel all Air](#)

United 1071

Departure: 06:00 AM
Newark Liberty Intl Airport (EWR)
Terminal: C

Confirmation: MQM12H
Status: Confirmed
Air Frequent Flyer Number: UA-SR784216

Seat: 34C (confirmed)
[Change seat](#)

[Add to your Itinerary](#)

TOTAL ESTIMATED COST

Air		View Fare Rules
Airfare quoted amount:	5	\$337.53 USD
Taxes and fees:		\$54.51 USD
Total Estimated Cost:		\$392.04 USD

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

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.

6 [Next >>](#) [Cancel Trip](#)

Enter Trip Information

1. Add a required Trip Name so that it can be added to your 'upcoming trip' list and a Trip Description, if desired.
2. Add a Comment to the Travel Agent to share information, being careful that your comment does not unnecessarily appear as a request for additional services, as they may incur a fee.
3. Add an email recipient to share the confirmation with another person.
4. If a Triptit user, select an option on this screen.
5. Use the bottom button selections to manage the reservation process. If ready to move on to finalize, click 'Next.'

The screenshot shows the 'Enter Trip Information' form. On the left is a 'TRIP SUMMARY' sidebar with a 'Finalize Trip' section containing 'Review Travel Details', 'Enter Trip Information' (highlighted), and 'Submit Trip Confirmation'. The main area is titled 'Trip Booking Information' and includes a note: 'The trip name and description are for your record keeping convenience. If you have any special requests for the travel agent, please enter them into the agent comments section.' Below this are fields for 'Trip Name' (with a red '1' next to it), 'Trip Description (optional)', 'Comments for the Travel Agent (optional)' (with a red '2' next to it), and a field to 'Send a copy of the confirmation to:' (with a red '3' next to it). There are also radio buttons for 'Send my email confirmation as' with 'HTML' selected. A 'Tript Privacy' section (with a red '4' next to it) has two options: 'Share trip destination and dates with your Tript Connections and Groups.' and 'Make this trip private' (selected). At the bottom right, a row of buttons includes 'Display Trip', 'Hold Trip', '<< Previous', 'Next >>', and 'Cancel Trip' (with a red '5' next to the entire row).

Purchase Ticket

1. Review the Trip Overview section to confirm final selections and details.
2. Note the deadline for finalizing the trip.
3. Select from the bottom button options to review previous screens, purchase the ticket or cancel.

The screenshot shows the 'Purchase Ticket' form. The 'TRIP SUMMARY' sidebar is updated to show 'Finalize Trip' with 'Review Travel Details', 'Enter Trip Information', and 'Submit Trip Confirmation' (highlighted). The main area is titled 'Trip Confirmation' and includes a note: 'To COMPLETE BOOKING, please press the "Purchase Ticket" Button after reviewing this page. To CANCEL, press the Cancel button.' Below this is a 'TRIP OVERVIEW' section (with a red '1' next to it). A blue information box (with a red '2' next to it) states: 'Airfare must be ticketed by: 12/05/2022 11:00 PM Eastern'. At the bottom right, a row of buttons includes 'Display Trip', '<< Previous', 'Purchase Ticket>>', and 'Cancel Trip' (with a red '3' next to the entire row).

Travel Program Resources

World Travel Inc. / Concur Travel	IEEE
<p>Concur Travel Online Booking Tool: Technical Support <i>(via World Travel)</i></p> <p>Chat Option: Click in the center box on the “Company Notes” tab of the Concur Travel homepage</p> <p>Phone: + 1 800 221 4730 Email: Onlinehelp@worldtravelinc.com</p>	<p><u>IEEE Travel Program Page</u> <i>For a full overview of the travel program and its resources, including:</i></p> <ul style="list-style-type: none"> • Concur Travel FAQs • Concur Travel Quick Reference Guide - Employee • Concur Travel Quick Reference Guide – Volunteer/Member • Travel Arranger Quick Reference Guide
<p>World Travel – Booking Agents & Emergency Support (24/7)</p> <p>+1 800 879 4333 (US & Canada) +1 717 556 1100 (Elsewhere)</p> <p>IEEE Account Pseudo Code 2UØF <i>(if requested)</i></p>	<p>IEEE Travel Program Operations</p> <p>Sherry Russ Sills, Director, Event Operations IEEE Meetings, Conferences, & Events (MCE)</p> <p>+1 732 562 3980 Email: mce-services@ieee.org</p>
<p>Online Resources <i>For videos, PDFs, webinars and more</i></p> <p><u>Concur & World Travel Self-Service Dashboard</u></p> <p>Concur Travel Training <i>(ongoing schedule)</i></p> <ul style="list-style-type: none"> • Concur Travel Basics • Tips & Tricks 	<p>IEEE NextGen Expense Reimbursement (Concur) General Inquiries:</p> <p>Email: nextgenexpense@ieee.org</p>