

## IEEE Volunteer Concur Travel Quick Start Guide

### Getting Started: Access IEEE Concur Expense & Travel (Known as: NextGen Expense Reimbursement (Concur) & Travel)

The NextGen Expense Reimbursement (Concur) & Travel tool uses a single sign-on process for logging in through [ieee.org/expense](http://ieee.org/expense), not [concur.com](http://concur.com). All users will need an IEEE account (IEEE username and password), as well as an Expense Reimbursement (Concur) account to access the platform.

If you do not already have an IEEE account or an Expense Reimbursement account, please visit [IEEE's NextGen Expense Reimbursement \(Concur\) & Travel](#) information page to learn how to create the accounts.

**Please Note:** When completing the NextGen Expense Reimbursement Concur User Registration Form (Step 2), please be sure to indicate your preference to have access to Concur Travel. Within 24-36 hours of your request, you will receive an email with login instructions.

### Review and Complete Profile Settings

Before you use Concur Travel for the first time, you will need to create or update, and then save, your Travel profile. Even if no changes are needed for an existing travel profile, you must open and 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 Concur IEEE home screen.
2. Select Profile Settings to see the menu for Profile Update Options.
3. On the Profile Options page, select any Travel Setting to update or confirm the profile content.

Update the appropriate information in each section or page and click Save.

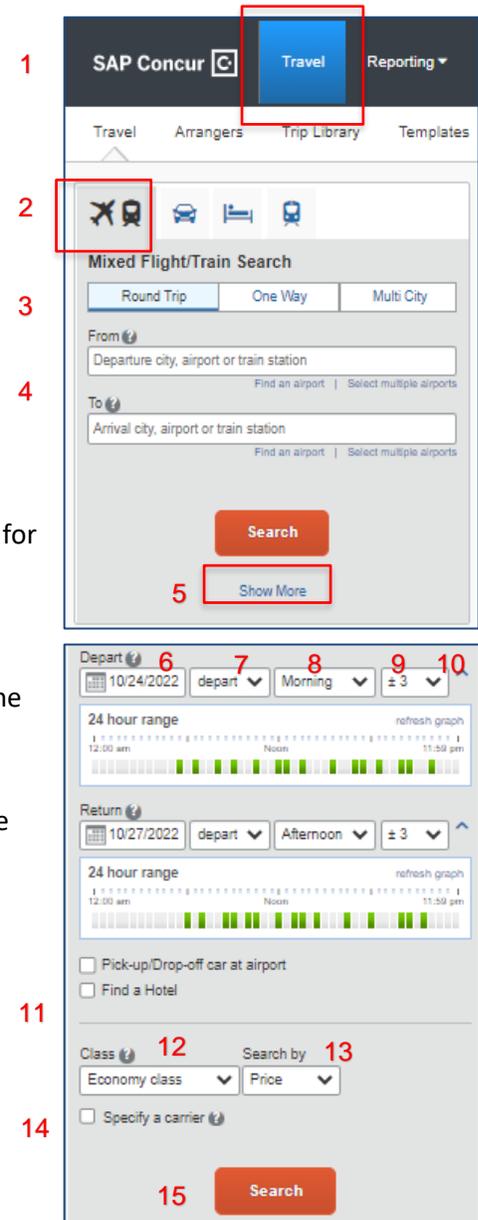
**Note:** Complete all required fields including your legal name that is on your travel document (Driver's License or Passport), date of birth and gender before saving your profile.

The screenshot shows the SAP Concur user interface. At the top, there are navigation tabs for Travel, Expense, Approvals, Reporting, and App Center. The user's name, Sherry Russ Sills, is displayed in the top right corner, along with a 'Profile' dropdown menu. The dropdown menu is open, showing 'Profile Settings' (2) and 'Sign Out' (1). Below the navigation bar, there is a 'TRIP SEARCH' field. The main content area displays the 'Travel Settings' menu (3), which includes options like Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers, E-Receipt Activation, and Travel Vacation Reassignment. The 'Travel Settings' menu is highlighted with a red box.

Once your profile 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 begin 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 area.
5. Click “Show More” to add additional detail options.
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 needed.
13. Set a ‘Search by’ preference. Default is ‘by Fares’ but you may choose to adjust this to ‘by 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 Travel and Expense Reimbursement Guidelines](#) for travel reimbursement guidelines.

## 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.

### '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.

The screenshot shows the flight search interface. On the left, the 'TRIP SUMMARY' panel includes 'Select Flights or Trains' (1), 'Finalize Trip' (2), and 'Change Search' (3). The main search area shows 'NEWARK, NJ TO CHICAGO, IL' for 'MON, OCT 24 - THU, OCT 27'. Below this, there are tabs for 'Shop by Fares' and 'Shop by Schedule'. The search results display a flight on 'Newark, NJ - Mon, Oct 24' with a 'Select' button (3). The flight details include 'United 06:15a EWR → 07:48a ORD Nonstop Economy' and a 'Select' button.

The 'Selected Fare' section displays the chosen flight: 'United 06:15a EWR → 07:48a ORD Nonstop 2h 33m' and '01:10p ORD → 04:30p EWR Nonstop 2h 20m'. A 'View Fares' button (4) is visible next to the price '\$641.52'.

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

**‘By Fares’:**

1. From the Search results screen, 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

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	<b>\$401.06</b> <input type="button" value="View Fares"/>
12:05p ORD → 03:29p EWR Nonstop 2h 24m United 785	
Most Preferred Airline for IEEE <input type="button" value="Show all details v"/>	
08:35a EWR → 02:36p ORD 1 stop CLE 7h 01m United 1683, 600	<b>\$401.06</b> <input type="button" value="View Fares"/>
12:05p ORD → 03:29p EWR Nonstop 2h 24m United 785	

06:00a EWR → 09:40a ORD 1 stop IAD 4h 40m United 686, 1744	<b>\$401.06</b> <input type="button" value="Hide Fares"/>
12:05p ORD → 03:29p EWR Nonstop 2h 24m United 785	
Most Preferred Airline for IEEE <input type="button" value="Hide all details ^"/>	
<b>DEPART</b> ✕ Mon, Oct 24 – Newark, NJ to Chicago, IL / 1h 13m layover in Washington, DC <input type="button" value="Flight details v"/>	
<b>RETURN</b> ✕ Thu, Oct 27 – Chicago, IL to Newark, NJ <input type="button" value="Flight details v"/>	
Fare Options      Free Checked Bags      Refundable	
ECONOMY (W, W, V) Rules Benefits/Services	0      No <input checked="" type="checkbox"/> <b>\$401.06</b>

## 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 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.

**1** 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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**ENTER TRAVELER INFORMATION**

Ensure all traveler information below is correct. ?

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

**Name:** Lorri Ann Cornett **Phone:** 732-562-6880 **Email:**

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

For United

3. Select your seats.

**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 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
<b>Total Estimated Cost: \$401.06</b>			
<b>Total Due Now: \$401.06</b>			

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

4

\* Indicates credit card is a company card

5

## 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 [\(Details\)](#)

**Add to your Itinerary**

🚗 Car 🏠 Hotel

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

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

[Change frequent flyer program](#)

**3 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-SRT04016

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

**4** + [Add to your Itinerary](#)

**TOTAL ESTIMATED COST**

<b>Air</b>	Airfare quoted amount:	<b>5</b>	\$337.53 USD	<a href="#">View Fare Rules</a>
	Taxes and fees:		\$54.51 USD	
	<b>Total Estimated Cost:</b>		<b>\$392.04 USD</b>	

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 Tripit user, select an option on this screen.
5. Use the bottom button options to manage the reservation process. If ready to move on to finalize, click 'Next.'

The screenshot shows the 'Trip Booking Information' form. On the left is a 'TRIP SUMMARY' sidebar with a 'Finalize Trip' section containing 'Review Travel Details', 'Enter Trip Information', and 'Submit Trip Confirmation'. The main form area is titled 'Trip Booking Information' and includes a sub-header: '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.'

Numbered callouts point to the following elements:

- 1**: Trip Name field (containing 'Trip from Newark to Chicago') and Trip Description field (containing 'Used to identify the trip purpose').
- 2**: Comments for the Travel Agent field (containing 'Special Requests may incur a higher service fee.').
- 3**: Send a copy of the confirmation to: field.
- 4**: Triplt Privacy section with options: 'Share trip destination and dates with your Triplt Connections and Groups.' and 'Make this trip private' (selected).
- 5**: Bottom navigation buttons: 'Display Trip', 'Hold Trip', '<< Previous', 'Next >>', and 'Cancel Trip'.

## 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 selections to review previous screens, purchase the ticket or cancel.

The screenshot shows the 'Trip Confirmation' form. The left sidebar is identical to the previous screen, but the 'Finalize Trip' section now includes 'Submit Trip Confirmation'. The main form area is titled 'Trip Confirmation' and includes a sub-header: 'To COMPLETE BOOKING, please press the "Purchase Ticket" Button after reviewing this page. To CANCEL, press the Cancel button.'

Numbered callouts point to the following elements:

- 1**: TRIP OVERVIEW section.
- 2**: Information box: 'Airfare must be ticketed by: 12/05/2022 11:00 PM Eastern'.
- 3**: Bottom navigation buttons: 'Display Trip', '<< Previous', 'Purchase Ticket>>', and 'Cancel Trip'.

## Travel Program Resources

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