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.
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 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 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.
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.
**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.
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.
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.

![Select Seats](image)

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](image)

![Select Method of Payment](image)
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.
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 selections to manage the reservation process. If ready to move on to finalize, click ‘Next.’

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.
Travel Program Resources

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<tr>
<th>World Travel Inc. / Concur Travel</th>
<th>IEEE</th>
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| **Concur Travel Online Booking Tool: Technical Support** (via World Travel) | **IEEE Travel Program Page**  
For a full overview of the travel program and its resources, including: |
| **Chat Option:** Click in the center box on the “Company Notes” tab of the Concur Travel homepage | • Concur Travel FAQs  
• Concur Travel Quick Reference Guide - Employee  
• Concur Travel Quick Reference Guide – Volunteer/Member  
• Travel Arranger Quick Reference Guide |
| **Phone:** +1 800 221 4730  
**Email:** Onlinehelp@worldtravelinc.com | **IEEE Travel Program Operations** |
| **World Travel – Booking Agents & Emergency Support (24/7)** | **Sherry Russ Sills, Director, Event Operations**  
IEEE Meetings, Conferences, & Events (MCE) |
| +1 800 879 4333 (US & Canada)  
+1 717 556 1100 (Elsewhere) | +1 732 562 3980  
**Email:** mce-services@ieee.org |
| **IEEE Account Pseudo Code 2UOF (if requested)** | **IEEE NextGen Expense Reimbursement (Concur) General Inquiries:** |
| **Online Resources**  
For videos, PDFs, webinars and more | **Email:** nextgenexpense@ieee.org |
| **Concur & World Travel Self-Service Dashboard** | **Concur Travel Training** (ongoing schedule) |
| Concur Travel Training (ongoing schedule)  
• Concur Travel Basics  
• Tips & Tricks |