Concur Train Travel Quick Start Guide

Getting Started: Accessing Concur Expense & Travel
IEEE Volunteers: Visit IEEE’s NextGen Expense Reimbursement (Concur) & Travel information page
IEEE Employees: Can access Concur from anywhere on InsideIEEE by selecting ‘Quick Links’ at the top of any page, then selecting the “NextGen Expense Reimbursement (Concur) & Travel” link

Review and Complete Profile Settings
Before you use Concur Travel for the first time, you will need to complete 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. Refer to the following Concur Travel Quick Start Guide to learn more:

IEEE Volunteers QRG
IEEE Employees QRG

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 train travel search.

Begin a Train Travel Search

1. Select “Travel” at the top left to exit the Profile page.
2. Click the Train icon at the top of the page.
3. Click to Select a trip search type:
   • Round Trip
   • One Way
   • Multi-City
4. Enter the ‘From’ and ‘To’ details using the city name or train station name.
5. Click the calendar in the ‘Depart’ and ‘Return’ fields to select dates.
6. Select a portion of day or a specific hour in the ‘Time’ drop-down boxes.
7. Set a ‘Search by’ preference of ‘Price’ or ‘Schedule.’
8. 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.
Select Your Train Travel Segments

Search Results will appear on the next screen, based on your selected parameters.

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 segments grouped by trainline.
2. Use the ‘Train Number Search’ or the ‘Sorted by’ arrow, if desired, to refine the options list.
3. Make changes to your search in the left panel search box or by using the blue toggle slides.
4. Use Train Station Filters to select depart and return stations separately when options exist.
Shop By Fares: ('by Schedule’ is below)

1. Click a ‘View Fares’ button to reveal the ‘Depart’ and ‘Return’ details of a specific itinerary.
2. Click the ‘Show all details’ down arrow to reveal the fare and seat class details.
3. Click the ‘Train details’ down arrow on the ‘Depart’ and ‘Return’ segments to show more detail.
4. Click a fare amount button to select the seat class and to advance to the Review and Reserve screen.
Shop By Schedule:

1. Click the ‘Shop by Schedule’ tab. The ‘Depart’ button will be the default first choice.
2. Click the ‘Select’ button to choose a departure train from the list displayed.
   That selection will appear above the ‘Depart/Return’ tab and the ‘Return’ tab will now be active. Click the ‘Remove’ button that appears to change the Depart train selection, if necessary.
3. Under the ‘Depart/Return’ tabs, (will auto-switch to ‘Return’) click the ‘Select’ button to choose a return train.

4. The itinerary will appear in the ‘Selected Fare’ box at the top of the screen.
5. Click ‘View Fares’ to reveal the available seat classes and fares.
6. Click ‘Show all details’ to reveal details of the depart and returns segments.
7. Click the ‘Train details’ down arrow on the Depart and Return segments to show segment details.
8. Click the fare amount button to select the seat class and to advance to the Review and Reserve screen.
Review and Reserve a Train Trip

1. Review the ‘Trains’ and ‘Passenger Information’ on this page. Use the ‘Back’ button at the bottom of the page for necessary train changes. Use the Passenger Information ‘Edit’ button for profile updates.
2. Enter any Rewards Program details, if applicable.
3. Select a ticket delivery preference.
4. Review the price summary and select a method of payment (add a credit card here, as necessary.)
5. Click the ‘Back’ button to make trip changes or the ‘Reserve Train and Continue’ button to confirm the reservation.
Finalize Your Trip - Review Travel Details

1. Review the Trip Overview section to confirm your selections and use the ‘Edit’ button to make changes.
2. Add a Description of the trip using the “Edit” button, if desired.
3. Add a car or hotel from this screen, if desired.
4. Review the Reservations details for all trip sections and add the trip to an itinerary from this section.
5. Click ‘Next’ to continue the reservation process, or ‘Cancel Trip’ to exit the process.
Enter Trip Booking Information

1. The Trip Name will populate automatically, but details can be added in the 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. Note the deadline for confirming the reservation.
6. Use the bottom button selections to manage the reservation process. If ready to purchase, click “Next.”
Purchase Ticket

1. Review the Trip Overview section to confirm final selections and details.
2. Select from the bottom button options to review previous screens (to make changes,) purchase the ticket or cancel the trip.
## Travel Program Resources

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<th>World Travel Inc. / Concur Travel</th>
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<td><strong>Concur Travel Online Booking Tool:</strong> <strong>Technical Support</strong> <em>(via World Travel)</em></td>
<td><strong>IEEE Travel Program Page</strong> For a full overview of the travel program and its resources, including:</td>
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| **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 | |
| **World Travel – Booking Agents & Emergency Support (24/7)** | **IEEE Travel Program Operations** |
| +1 800 879 4333 (US & Canada)  
+1 717 556 1100 (Elsewhere) | Sherry Russ Sills, Director, Event Operations  
IEEE Meetings, Conferences, & Events (MCE) |
| IEEE Account Pseudo Code 2UØF *(if requested)* | +1 732 562 3980  
Email: mce-services@ieee.org |
| **Online Resources**  
For videos, PDFs, webinars and more | **IEEE NextGen Expense Reimbursement (Concur) General Inquiries:** |
| **Concur & World Travel Self-Service Dashboard** | Email: nextgenexpense@ieee.org |
| Concur Travel Training *(ongoing schedule)*  
• Concur Travel Basics  
• Tips & Tricks | |