

IEEE Volunteers & Members 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, not 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.

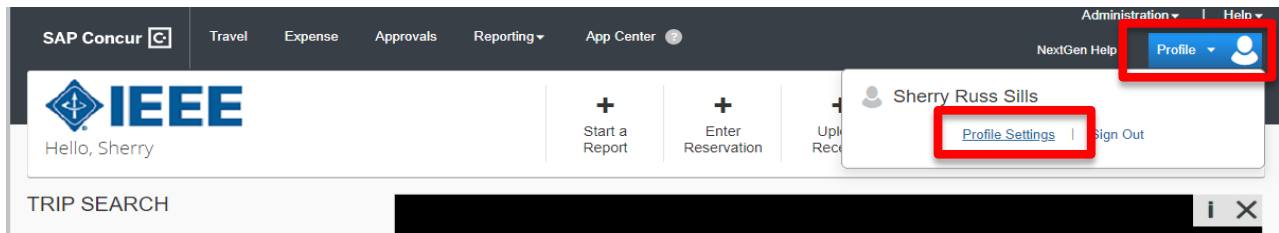
If you do not already have an IEEE account or an Expense Reimbursement account, please visit [IEEE's NextGen Expense Reimbursement \(Concur\) & Travel](#) information page to learn how to create the accounts.

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.

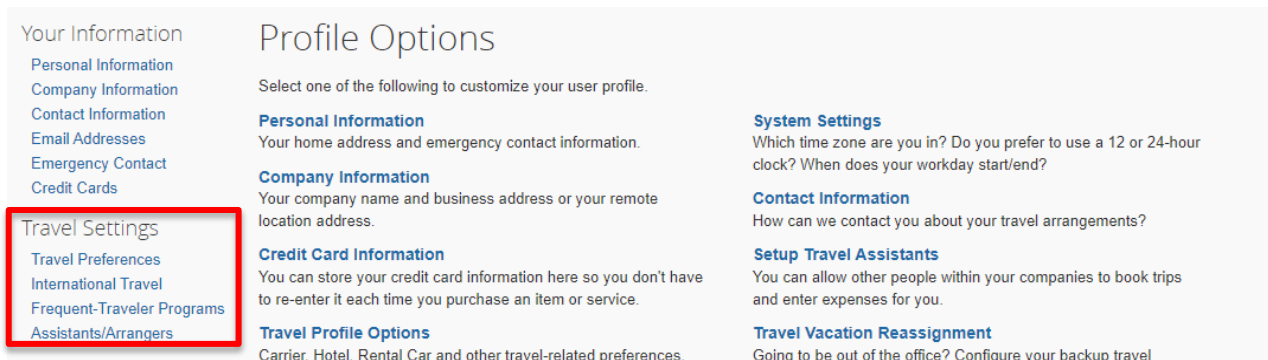
Review and Complete Profile Settings

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 and then Profile Settings in the upper right-hand corner of the Concur home screen.



2. On the Profile Options page, select the appropriate Travel Settings links on the left side of the page. Update the appropriate information and click Save.

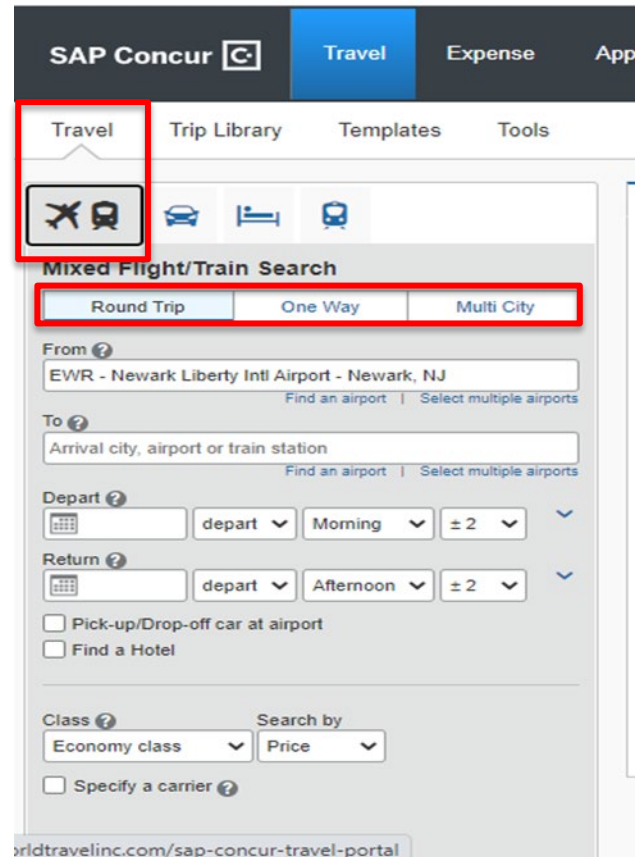


Note: Complete all required fields including your legal name on your travel document (Driver’s License or Passport), date of birth and gender before saving your profile.

- 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.

Making a Flight Reservation

- Select “Travel” on the top left navigation menu.
- Click Airplane/Train icon at the top of the page.
- Click to Select a Flight Search type:
 - Round trip
 - One Way
 - Multi-City
- 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.
- Click the calendar in the Depart and Return fields to select dates (*shows inventory up to 331 days out.*).
- Select ‘Depart’ or ‘Arrive’ in the drop-down boxes to direct the basis for the time search.
- Select a portion of day or a specific time in the ‘Time’ drop-down boxes.
- 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.
- Check the car and/or hotel box, if desired.
- Choose a Class option from the drop-down list. Economy is set by default and can be changed, as needed.
- Set a ‘Search by’ preference. Default is ‘by Fares’ but you may choose to adjust this to ‘by Schedule’.
- Check the ‘Specify Carrier’ box to search by a specific carrier (e.g., United), if desired.
- Click Search.



Notes: 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.

Selecting Your Flights

Flight Search Results will appear based on your selected parameters. Your selected parameters will appear as a 'Trip Summary' on the top left side of the results page. Within this page, you have the option to adjust your search utilizing the slide toggles. Click-hold a blue dot and move it right or left.

The screenshot displays the flight search results for Newark, NJ to Fort Myers, FL from Tuesday, Feb 15 to Friday, Feb 25. The 'Trip Summary' on the left shows a round trip from EWR to RSW. The search results are filtered by 'Shop by Fares' and sorted by 'Price - Low to High'. The first result is an American Airlines flight with a price of \$285.21. The interface includes various filters and controls, such as the 'Change Search' dropdown, departure and return date/time sliders, and a 'View Fare' button for the selected flight.

1. Select the 'Shop by Fares' or 'Shop by Schedule' tab above the flight list.
2. Select flights by clicking 'Select' if 'by Schedule' or the 'View Fare' and then the amount button if 'by Fare.'
3. If 'by Fare,' an option might appear on the next screen after selecting a flight. If so, Select that flight.
4. Review the flight segments and Traveler Information before adding car and/or hotel and remember to Select your Seats.
5. Apply any credits and/or select a credit card.
6. Click Reserve Flight & Continue at bottom of page.

Review Details and Confirm Travel Booking

1. See the Trip Booking Information page to add additional information such as a Trip Name, Description, and additional email recipients.
2. Review details, messages and ticketing policies on the Trip Confirmation page.
3. Click to Confirm your booking.
4. Finalize your booking by clicking FINISH.

Find more Resources on the [IEEE Travel Program Page](#):

- Traveler Resources
- IEEE & World Travel Contacts & Support
- NextGen Expense (Concur) & Travel Access