



Concur Travel and Expense Frequently Asked Questions

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Travel Terminology

Question #1: What is Concur Travel?

Answer: Concur is the brand name of the travel and expense system which we use to process expense reports and book travel. It is an online tool that can be accessed via the Concur Expense site. This tool includes time saving methods to book cost efficient travel arrangements to fit your business needs.

Question #2: What will I use Concur Travel for?

Answer: Concur Travel is used to book all travel arrangements for your business travels with TCS. (book airfare, hotel accommodations, car rental, etc.) and report the related expenses in an efficient manner.

Question #3: What is Concur Mobile?

Answer: Concur Mobile is a tool linked with Concur Travel which allows travelers to manage their travel itineraries and expense transactions from their iPhone, Blackberry or Android. Key features include:

- Management of travel itineraries
- Changing air travel date or time
- Add or changing reservations for hotels or rental cars
- Arranging for taxis or dining reservations
- Capturing out-of-pocket expenses
- Taking pictures of receipts
- Approving trips or expense reports (if a manager)

The use of Concur Mobile in conjunction with Concur Travel is optional. There is no additional charge to install or use the application; there are no transaction fees. Concur Mobile can be used with the BlackBerry (OS 4.2 and higher), Windows Mobile (OS 6.0 and higher), and the iPhone/iTouch (OS 3.0 and higher). Instructions on the set-up of the feature can be found on the Concur Travel site.

Getting Started

Question #4: How do I log into Concur Travel and Expense?

Answer: All employees should use their email address and password

Question #5: What happens if I forget my password?

Answer: Use the "forget password" line and the system will walk you through some prompts and a temporary password will be sent by Concur. It will be good for 24 hours only.

Question #6: Where can I find a copy of the TCS Travel Policy?

Answer: All employees can obtain a copy of the policy by going on the intranet, contacting the state representatives or contacting the company administrator.

Question #7: When can I begin using Concur Travel?

Answer: All employees will begin using the new Concur travel and expense on March 9, 2012. All previous methods of booking travel arrangements will cease at this time as well.

Question #8: Who will have access to Concur Travel?

Answer: All employees have access to Concur Travel and Expense if travel, company reimbursement or credit card reconciliations as a routine part of their job responsibilities.

Question #9: How will I access Concur?

Answer: After a new employee concur form is filled out, access to Concur will be through <https://concursolutions.com> via authenticated login using your email address and password. This is the same site as Concur Expense.

Question #10: Do I have to use Concur Travel?

Answer: Yes, it is mandatory to use Concur Travel for all travel booking as of March 9, 2012.

Question #11: Why can't I book travel on my own via a site similar to Expedia or Orbitz?

Answer: TCS and Affiliates lose valuable management information, and negotiated discounts when arrangements are made outside the designated agency.

Question #12: Why should I use the Concur Travel online system to book trips instead of just calling our agent directly?

Answer: Concur Travel online is fast and convenient. It is available 24/7. The Concur online booking fee is only \$7.00, while calling an agent is \$20.00. When searching for flights, hotels and cars, Concur online shows all carriers on a single screen, providing the ability to price compare. Concur online also provides a list of all travel plans you've made in the system.

Question #13: How do I obtain log in and password for Concur Travel?

Answer: For Initial Set up, Termination and Password Reset, please contact state representatives-Tonya Brooks (TCS Education System), Richard Chandler (Chicago and TCSPP National), Charlotte Reace (DC), Michelle Mendez (POC), Mojdeh Razazan (Southern California) and David Ristig (COL-SB and V)

Question #14: What should I do the first time I log into Concur Travel?

Answer: Before you login, you should have gone through an initial training on how to use the system. After you get training and you log into Concur, you MUST complete/review your profile. You must save your profile before you first attempt to book a trip in Concur. If you are a travel arranger, select the profile that you want to edit from the "You are Administering Travel For" list on the "My Concur" page and then click Profile.

Question #15: Is my personal information entered in the travel profile shared with anyone?

Answer: Only you as the traveler and the travel arranger have access to the profile information. The travel arranger does not have access to your personal credit card information.

Question #16: What are the required fields on the profile page?

Answer: The fields required to be filled out on the profile page are contact telephone numbers, email addresses, TSA information, and personal credit card (s). Optionally, you can also enter travel preferences such as frequent flyer information and seating preferences.

Question #17: What if I do not want to use my personal credit card in Concur Travel?

Answer: To use Concur and reserve air, hotel room and a rental car, you must use and enter a credit card number. The Concur site is a secure site. Only the last four digits of the card number are shown.

Question #18: How do I get help for using Concur Travel and Expense?

Answer: You can look into the Concur/Travel Manual. Located on the intranet if the copy is missing
You can reach out the 24 hour help desk for your question
You can reach out to your State Representative for assistance
You can reach out to the Company administrator (Tonya Brooks)
You can click Help on the "My Concur Page". In the Help section, you can find specific instructions for the task you are trying to complete.

Question #19: International travel only-How to reconcile the cash advances after the trip?

Answer: Please reference the FSAP policy for the directions on how to reconcile all cash advances. +

Travel Assistant - Booking Travel for Others and One-time Guests

Question #20: Are the following terms interchangeable: Primary Assistant, Travel Arranger, Travel Planner, Travel Coordinator, and Travel Assistant?

Answer: Yes.

Question #21: What if I do not book my own travel?

Answer: In Concur, you can select an assistant or arranger to reserve your travel. On the "My Concur" page, click "Profile" and then click the "Assistants" link at the top of the page. Click "Add an Assistant" to add the person who you would like to authorize to reserve your travel. This person can now update your profile and also make travel arrangements for you. If you do not see your travel arranger in the list of people to select from, that individual might not have access to Concur.

Question #22: How many primary assistants can I have?

Answer: You can have an unlimited number of primary assistants.

Question #23: What is the difference between "can book travel for me" and "is my primary assistant"?

Answer: If you want the assistant to just book travel for you, select "can book travel for me." If you want to allow the assistant to view, make changes to, and modify your profile, select "is my primary assistant." If you want the assistant to be able to do both, select both options.

Question #24: Can one travel arranger set-up travel for all travelers?

Answer: Yes.

Question #25: Can I book travel for guests?

Answer: Yes, provided you have been given security rights to do so. Click on the "You are administering travel for" dropdown in the upper right hand corner of the Travel Home page and select "Guest". For a guest who travels a few times a year, you can have a profile set up for him or her. If you do not have this security, please contact and request this access.

Question #26: Is there a different set-up for employees who travel only once?

Answer: Travel arrangers can be set-up to book one time travelers, or guests.

Question #27: I arrange my supervisor's travel. Should he or she have their own password?

Answer: Yes, you and your supervisor must have a discrete traveler profile with separate passwords. Your supervisor should assign you as a travel arranger via his or her profile.

Question #28: Do I, as the travel arranger, need to input the traveler's credit card number?

Answer: No, the traveler will input their credit card number when they complete their profile.

Question #29: What procedure should I use if I have two or more travelers going to the same destination?

Answer: Concur will allow you to clone a reservation. When the first booking is made, you will be able to clone the reservation, found under the "Upcoming Trips" tab as one of the trip actions. After selecting the trip action to clone, you will then pull over the next traveler's profile so that all frequent guest numbers and credit cards are captured and then add any additional cars or hotels before submitted to purchase.

Contacts/ Fees

Question #30: Who is my travel program administrator at TCS and Affiliates?

Answer: Questions regarding travel policy should be directed to Tonya Brooks, Director of Treasury

Question #31: Who should I contact if I feel I am not receiving the lowest fare available via Concur?

Answer: There are certain factors that can affect the pricing of airline tickets. These factors can include any of the following: search criteria, availability, or time of booking. At certain points in time, internet travel sites may be able to offer lower air fares for certain markets. This type of "unpublished" fare may be unavailable to our designated agency. However, overall, the company still saves by mandating use of our preferred travel provider and air carriers because we qualify for greater discounts by maintaining the purchase volume to which we've committed. Questions regarding policy should be directed to

Question #32: Who should I contact for assistance with navigating the Concur online tool?

Answer: For online assistance, Email Contact: cb@travellleaders.com, Phone Contacts: Billy Vu (800) 741-4116 x 132 and Terri Hiltzheimer (800) 741-4116 x 139. For reservation assistance please contact Travel Leaders at 800 741-4116, press 1.

Question #33: If I have a question regarding Concur and call Travel Leaders (our agent), will I be charged a fee?

Answer: You will not be charged a fee to speak with an agent. The fee is only charged if a ticket is purchased.

Question #34: Is there a fee charged if there is a trip on hold?

Answer: No, but keep in mind a trip will only remain on hold for 24 hours. An exception to this rule is if a traveler is booking at exactly 7 or 14 days prior to the flight. Trips booking at exactly 7 or 14 days out must be ticketed that day- there is no 24 hour window.

Question #35: Can I import Concur Travel expenses directly into Concur Expense?

Answer: Yes, using the import feature.

Reservations

Question #36: What does the yellow diamond represent when viewing air, hotel, and car options?

Answer: The yellow diamond represents a company preferred vendor.

Question #37: What is a yellow light violation?

Answer: A yellow Reserve indicates the fare is the maximum in the travel policy. If you select this fare, you must enter an explanation as to why the fare was selected as opposed to the recommended fare.

Question #38: What is a green light?

Answer: A green Reserve button indicates the fare is within policy.

Question #39: I frequently travel to the same destination, stay in the same hotel and rent the same car. Is there an easy way to book this trip?

Answer: Yes, you can create a "Template" for any trip. Click the "Actions" button on a trip in your "Trip Library", and select the option to "Create a Template".

Flights

Question #40: Can we book refundable fares?

Answer: Penalty or non-refundable fare tickets must be purchased when travel is unlikely to change.

Question #41: Does the company pay for baggage fees?

Answer: The Company will reimburse expenditures up to 2 bags. The company will not reimburse for personal baggage, such as golf bags and animal carriers.

Question #42: How can I see the flights I have already booked in the Concur Travel online tool?

Answer: Go to the "Trip Library" to view a list of your itineraries. You can search for a specific itinerary by entering keywords and a date range. Click the "Actions" button to "View" the itinerary, "Email" the itinerary, "View Request", "Create a Template", "Change" or "Cancel" the trip.

Question #43: Can you check "price and schedule" when searching for airline reservations in the online tool?

Answer: No, you must select either price or schedule.

Question #44: What is the different between Hold Trip and Purchase Now?

Answer: "Purchase Now" will purchase and ticket your flight as well as confirm car and hotel reservations. "Hold Trip" will save your itinerary and confirm the car and hotel but does not ticket your flight. You can come back later to purchase the flight. In order to prevent a hotel no-show charge, you will want to cancel a reserved itinerary if you are not going to use it. Also, airfare is subject to change until ticketed, so the fare could change until you actually purchase the ticket.

Question #45: Can we print boarding passes through Concur or do we have to go through the airlines?

Answer: No, Boarding passes are provided via the airlines.

Question #46: What if the city I want to travel to is not available for selection when creating an itinerary?

Answer: If there is not an airport in the city, you can select the "?" above the departure or arrival city and Concur Travel will direct you to the closest airport.

Question #47: What type of confirmation will I need at the airport?

Answer: You will need a printed or electronic boarding pass and itinerary or airline confirmation number.

Southwest Airlines

Question #48: Will Southwest Airlines fares show up in Concur?

Answer: Yes. Southwest Airlines has joined with Concur to offer access to SWABIZ, Southwest Airlines' business travel reservation Web page, for travelers booking through Concur® Travel & Expense.

Hotels

Question #49: Can we set-up multiple credit cards to pay for hotels?

Answer: Yes. You can set-up several credit cards within your profile.

Question #50: What do I do if the conference I am attending has a special conference or hotel rate?

Answer: Generally, you should follow the conference instructions. If the conference room rate is lower than our current TCS loaded rate, please book directly with the conference and send an explanation to your approving manager or designee as to why.

Question #51: What should I do if a hotel I routinely stay at is not listed as a selection choice in Concur Travel?

Answer: First, please verify the location of the hotel. Often times, hotels maybe listed with slightly different addresses than expected.

Question #52: What should I do if the rate on a hotel in Concur Travel is higher than a rate I have personally negotiated prior to the implementation of the Concur Travel system?

Answer: Please provide contact information to cb@travelladers.com so that we can reach out to the hotel and obtain a similar rate for all employees.

Question # 53: Why do some of the lower rates on the hotels say "Deposit Required/ Advance Purchase No Refunds"?

Answer: Hotels offer non-refundable fares at a lower rate. This rate should not be selected if there is any possibility that the travel plans will change.

Question #54: Why do some of the hotel choices refer to Abc Corporate Services? May I book this rate?

Answer: Yes, you may select this reservation option. Our travel agent (Travel Leaders) is affiliated with ABC. ABC has negotiated special rates with over 15,000 properties. You will not be asked at check-in to show ID as an ABC member.

Rental Cars

Question #55: What is a reasonable tip for ground transportation?

Answer: Taxi Driver - 15%-20% of total fare; Courtesy Shuttle Driver - \$1-\$2 per person, or \$4-\$5 per party. Please reference the TCS. Travel and Expense Policy for further detail.

Question #56: May I submit for mileage reimbursement while on a business trip in a rental vehicle?

Answer:

Meals

Question #57: If I combine all of daily meal allowance into one meal costing \$65.00, can I get reimbursed for it?

Answer: You may combine your meal allowances. Employees may not exceed the following per person per meal limits while traveling: Breakfast - \$12; Lunch - \$18; Dinner - \$35.00. Please reference the Travel and Expense Policy for further detail.

Cancellations/Changes

Question #58: How do I make cancellations?

Answer: Cancellations can be made in Concur Travel before the flight departs. You can also call Travel Leaders (800) 741-4116 to make cancellations at no additional fee. After Hours Emergency Line for Travel Leaders is (888) 220-3135 from 8:00 pm until 8:30 am (Eastern Time).

Question #59: If I have to cancel my flight, how can I do it without losing credits on my non-refundable fare?

Answer: Traveler must cancel all air reservations, before flight departs.

Question #60: If I am out on the road and I have to make a change through Travel Leaders, will there be a charge?

Answer: If calling during operating business hours of 8:30 am - 8:00 pm EST, the change fee of an airline ticket is \$15.00. If an employee call after normal business operating hours, e an emergency fee of \$20.00 is charged.

Question #61: What should I do if I book an air reservation on Concur, and a few hours later decide to add a car and/or hotel?

Answer: You can make changes after the ticket has been issued. To add or modify your trip, click the name of the trip in the "Upcoming Trips" tab and then select "Change Trip".

E-Receipts

Question #62: What are E-receipts in Concur?

Answer: E-receipts are electronic itemized receipts that can be accepted in lieu of a scanned or attached receipt file. Travelers are able to receive E-receipts for transactions from participating vendors. Unlike credit card data, which can be incomplete, e-receipt data will always provide full detail. To enable E-receipts, click the "Profile" tab to view your profile options, and then select "E-receipt Activation". Read the agreement and then click "I Agree" to complete the e-receipt activation.

Question #63: Will an e-receipt vendor provide an e-receipt for a User in the event of a split folio?

Answer: A split folio occurs when a hotel guest pays for their stay using more than one form of payment. For example, a guest might pay cash or use a personal credit card for charges outside of their company's travel policy (in-room movies, laundry or mini bar items) and pay for true business expenses (room, tax, hotel restaurant meals) with their corporate card.

Users will generally not receive an e-receipt for a hotel stay when there is a split folio. In some cases this is due to a limitation of the hotel's Property Management System, which is incapable of providing an e-receipt for only the business expenses paid by the traveler with their corporate card. In other cases, hotel vendors cite data privacy concerns for their guests as the basis for not passing an e-receipt for a hotel stay paid for with more than one form of payment.

Question #64: If a User pays for a hotel stay and is issued a credit later, will they receive an e-receipt for the credit?

Answer: No. Hotel vendors do not send e-receipts for credits issued after checkout.

Question #65: Will a user receive an e-receipt if the hotel or car is paid for with their personal credit card?

Answer: Yes. If a User pays for a hotel stay or car rental with their personal credit card, Concur will load an e-receipt that is passed by the vendor as long as the personal credit card has been opted-in to the e-receipt program in the User's Profile.

Question #66: How quickly will an e-receipt be available to an employee for submission on an expense report?

Answer: The Service Level Objective is for e-receipt vendors to send an e-receipt to Concur within 48 hours of a traveler checking out of the hotel or returning the rental car. The timing can vary vendor by vendor.

Question #67: What should an employee do if they do not receive an e-receipt for a hotel stay or car rental?

Answer: The employee can either scan and upload or fax the paper folio they received from the hotel or car rental agency.