

## PIPSC Concur Travel How-To Guide

Concur Login Instructions	1
How to Register for a PIPSC Meeting	2
For Pre-Approved Travel	2
For Unapproved Travel	2
How to use Concur Travel	3
Booking a Flight	3
Searching and Booking a Car	4
Searching For and Booking a Hotel	5
Making Changes to a Flight Booking	5
Cancelling a Flight Booking	6
Changing or Cancelling a Hotel or Car Reservation	6
Applying Unused Ticket Credits to a Trip	6
Updating Your Concur Profile	7

---

### Concur Login Instructions

- Enter user name 'member#@pipsc' (e.g 2345678@pipsc - **Do not add the '.ca'**) and password. [Instructions on how to look up your membership number.](#)
- **If this is your first time using Concur:** Click on "Forgot your password". This will generate an email to your preferred email address with instructions to update your password. This initial password reset must be completed via the **web-based version of Concur and NOT via the mobile app**
- Make sure your profile is up to date. [Instructions on how to update your Concur profile](#)

## **PIPSC Concur Travel How-To Guide**

[Back to top](#)

### **How to Register for a PIPSC Meeting**

- You will receive an email invitation from the staff resource (admin assistant/meeting planner)
- Click the link within the email to register and confirm your attendance

### **For Pre-Approved Travel**

Pre-approved travel is for meetings with 5 or more members. You must register as outlined above before booking any travel.

- Once your registration is complete within Cvent, you can book travel by clicking on the 'Go to Concur' link on the confirmation page to be taken to the Concur site
- Make sure your profile is up to date. [Instructions on how to update your Concur profile](#)
- Follow the on-screen instructions to complete your travel arrangements. [Training video on how to reserve travel](#)

### **Request For Travel**

This type of travel is for events, conferences or smaller meetings with less than 5 travellers. The process is similar to the previous "paper TAN" process.

- Login to the [Concur Travel site](#). Make sure your profile is up to date. [Instructions on how to update your Concur profile](#)
- Complete your travel arrangements and input required trip purpose information. [Training video on how to reserve travel](#)

Your request will be routed for approval and then ticketing/reservation.

## **PIPSC Concur Travel How-To Guide**

[Back to top](#)

### **How to use Concur Travel**

Learn how to use Concur Travel to book a flight, car, and/or hotel reservations through this [training video](#).

### **Booking a Flight**

#### **Step 1 - Search Flights:**

- After logging into Concur, use the **Trip Search** tool and click on the **Flight Search** option
- Select **Round Trip** as the flight option
- Enter your **Departure/Arrival Cities**. When you type in a city, airport name, or airport code, Concur will automatically search for matching names [Optional: Use 'Find an airport' and select multiple airports links as needed]
- Enter your **Departure** and **Return** dates using the dropdown calendar; Use the remaining fields in this section to define the desired time range for departure and arrival
- Click the arrow to the right of the time window to see nonstop flights available for routing and dates you have selected; you can adjust your search criteria, if necessary, to see and reserve nonstop flights
- Click the **Search** button

Additional available options on this page:

- If you need to add a car rental, within the 'Trip Search' box, click the 'Pick-up/Drop-off car at airport' check box and enter information in additional fields
- If you need a hotel, click the 'Find a Hotel' check box and enter information in additional fields
- You can also search flights by Price or Schedule
- Enter your criteria and click Search. The flight search results will appear

## **PIPSC Concur Travel How-To Guide**

[Back to top](#)

### **Step 2 - Select Flights:**

On flight search results page:

- If you searched by Price, then the '**Shop by Fares**' tab is active
- If you searched by Schedule, then the '**Shop by Schedule**' tab is active
- Click the applicable tab to view your results and **Select** the fares based on your preferences
- If car and hotel options were requested in the search, these options will appear for selection

### **Step 3 - Purchase Ticket:**

- After you have selected your flights, confirm your information is correct on the **Review Travel Details** (itinerary) page
- Make any changes necessary
- Select your seats
- Review the **Total Estimated Cost**
- Click **Reserve Flight and Continue**
- Take note of any ticketing policies on the **Trip Booking Information** page
- Click **Purchase Ticket** to complete your booking and send your request to the travel agency for fulfillment
- '**Finished!**' screen shows your confirmation number and information to contact travel agency
- Your ticket confirmation will be sent to you by email

## **Searching and Booking a Car**

- *Please note, all car bookings are submitted for approval as a special request*
- Use the **Trip Search** tool and click the Car icon
- Select **Pick-up Date**
- Select **Drop-off Date**
- Type in the airport to be used for pickup/drop off
- Click the **Search** button
- Select the rental cost

[Back to top](#)

## **PIPSC Concur Travel How-To Guide**

- Click **Reserve & Continue**
- Click **Next**
- Type **Trip Name**, **Trip Description** and **Trip Purpose** and Click **Next**
- Click **Confirm Booking** to complete your car reservation

### **Searching For and Booking a Hotel**

- Use the **Trip Search** tool and click the Hotel icon
- Select **Check-In Date**
- Select **Check-Out Date**
- Search by **Airport**, **Address**, **Company Location** or **Landmark / Postal Code**
- Click the **Search** button
- Click **View Rooms** and select the room rate
- Click **Reserve & Continue**
- Enter your credit card details to hold the hotel room
- Click **Next**
- Fill in a **Trip Name**, **Trip Description** and **Trip Purpose** and Click **Next**
- Click **Confirm Booking** to complete your room reservation

### **Making Changes to a Flight Booking**

- Click **Trip Library** located on the top menu and select the trip you wish to change
- Scroll down and select the reservation you wish to change
- Select the **Change** link on the right side of your reservation
- The **Change Flight** popup will appear, displaying your segments
- Mark the checkbox of the Segments your wish to change - you will notice some airlines require you to re-confirm the entire itinerary due to their policies, so we advise to select all segments
- Enter you flight change criteria
- Select each new/remaining segment options
- Click on **Get Price**
- Finish by selecting **Purchase New Flights**

## **PIPSC Concur Travel How-To Guide**

[Back to top](#)

### **Cancelling a Flight Booking**

- Go to the **Upcoming Trips** tab located on the main Concur Travel page
- Select the trip which should be cancelled
- Under the **Action** column, click on the **Cancel Trip** link and follow the prompts
- Once the reservation is cancelled successfully you will receive a cancellation email of the itinerary
- The trip will show status "**Withdrawn**" in your **Trip Library**

### **Changing or Cancelling a Hotel or Car Reservation**

- Go to the **Upcoming Trips** tab located on the main Concur Travel page
- Click on the trip that you wish to change
- From the **Trip Overview** page, select the links to add a **Car** or **Hotel** or select **Change** or **Cancel** under the **Reservations** section

### **Applying Unused Ticket Credits to a Trip**

- Unused ticket credits will be automatically applied by BCD Travel provided the new airfare is the same or higher priced than the value of the unused ticket airfare and it is with the same airline
- If the you choose to use an unused ticket credit that is higher in value than the airfare booked and willing to forfeit any residual value of the unused ticket credit, you will need to contact a travel consultant at BCD Travel to book the trip
- If you want to use a credit that is under the name of another traveller, perhaps in the case where you are no longer a member or won't be travelling prior to the expiration of the credit, the booking will need to be made through BCD Travel and the new traveller would need to provide your name and the ticket number

## **PIPSC Concur Travel How-To Guide**

[Back to top](#)

### **Updating Your Concur Profile**

- Go to **Profile**, then **Profile Settings**, located in the top right corner
- Click on **Contact information** under **Personal Information** on the left side
- Enter your contact details, emergency contacts, travel preferences, frequent traveller and credit card details and click **Save**