

Travel: Clone/Share Trip

Travel Service Guide

Last Revised: August 12, 2020

Applies to Concur Travel:

- ☒ Professional/Premium edition
 - ☒ TMC Partners
 - ☒ Direct Customers
- ☒ Standard edition
 - ☒ TMC Partners
 - ☒ Direct Customers

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Revision History

Date	Revision Notes/Comments
July 25, 2023	Updated Overview section with note on SAP Concur UI themes; no other changes
March 6, 2023	Updated the <i>Important</i> section of the <i>Overview</i>
January 18, 2022	Updated the copyright year; no other changes; cover date not updated
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
August 12, 2020	Updated <i>About This Guide</i> and <i>Overview</i> sections
February 14, 2020	Updated the copyright; no other changes; cover date not updated
June 19, 2019	Removed "Concur" from the cover; no other changes; cover date not updated
March 10, 2019	Updated the copyright; no other changes; cover date not updated
July 16, 2018	Added a note that this feature cannot be used with configurations that have Travel integrated with Request.
January 2, 2018	Updated the copyright; no other changes; cover date not updated
October 7, 2016	General updates; initial publication in the new format

Clone/Share Trip

Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur (if SAP Concur provides their support).

Professional and Standard Travel

This guide discusses both Professional and Standard Travel. In those cases where there is a difference between Professional and Standard, that difference is noted.

Section 2: Overview

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

The Clone/Share Trip feature allows users/arrangers to easily book identical trips and to share trips with others.

- **Clone:** A user/arranger can clone an itinerary for himself or anyone that they have been designated to assist.

When the user/arranger clicks **Clone Trip**, Concur Travel starts a booking process with the identical parameters of an existing itinerary. The user/arranger can then modify as needed.

NOTE: A self-assigning assistant can clone an existing itinerary for anyone in their company **except** those who have selected **Refuse Self Assigning Assistants** in Profile. If the assistant attempts to clone a trip that belongs to a user who refuses, a message appears.

- **Share:** A user, arranger, or self-assigning assistant can share a trip with any other user in their company, regardless of their role.

When the user/arranger clicks **Share Trip**, Concur Travel sends an email to the invitee and adds a travel alert to the invitee's Travel home page. The invitee user can then book a trip, starting with the same parameters as the shared trip and modifying as needed.

Important

Note the following:

- The Cloning/Sharing feature cannot be used with configurations that have Travel integrated with Request.
- Class of service rules are applied when using cloned or shared trip. Travelers will be able to choose between any and all classes of service available for the cloned/shared trip they are booking, in accordance with their travel policy class. Travelers cannot book cloned/shared trips out of their policy class of service.
- Clone Trip is not just for traditional GDS itineraries; it also supports cloning itineraries that use American Airlines AirPass, or the Concur Travel flex-faring interface.
- Cloning/Sharing train, ground, or car connector content is not supported at this time.
- Cloning/Sharing hotel reservations from hotel service content suppliers and custom hotel sourcing suppliers is not supported at this time
- On-hold trips can be cloned/shared.

Benefits

Clone/Share trip benefits users in the following ways:

- Provides a shortcut for a traveler to copy an itinerary
- Allows users to share information about their trip(s) with others
- Copying allows arrangers/assistants to manage more users faster

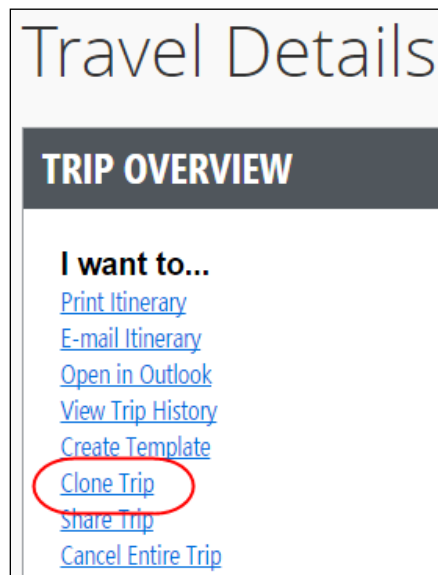
Section 3: End-User Experience/Arranger Experience

Clone a Trip

To get started:

- If a **user** is cloning a trip, the user locates the desired trip and then opens the itinerary.
- If an **arranger** is cloning a trip, the arranger selects the desired user in **Profile > Acting as other user**, locates the desired trip, and opens the itinerary.

Then, in the **Trip Overview** section on the **Trip Details** page (itinerary), the user/arranger clicks **Clone Trip**.



The **Clone Trip** page appears.

Clone Trip

Trip Name: Trip from Seattle to Dallas

Book for traveler: Burman, Donn R. ▼

[View Trip Information](#)

☒ Search for these specific flights
 ☐ I would like to do a general search
 ☐ Refundable only air fares

Depart Date:

Seattle Tacoma Intl Arpt (SEA) to Dallas Ft Worth Intl (DFW)
 American Airlines (AA) Flight Number 1228 Depart After 6:00 AM (Economy)

Depart Date:

Dallas Ft Worth Intl (DFW) to Seattle Tacoma Intl Arpt (SEA)
 Alaska Airlines (AS) Flight Number 653 Depart After 1:15 PM (Economy)

In the **Book for traveler** list, the user/arranger selects the user for whom the trip is cloned. (In this case, the original trip belongs to Donn Burman and is cloned for Pat Davis.)

Clone Trip

Trip Name: Trip from Seattle to Dallas

Book for traveler: Chris L. Collins
Burman, Donn R.
Davis, Pat R. ▼

[View Trip Information](#)

☒ Search for these specific flights
 ☐ I would like to do a general search

The user/arranger selects:

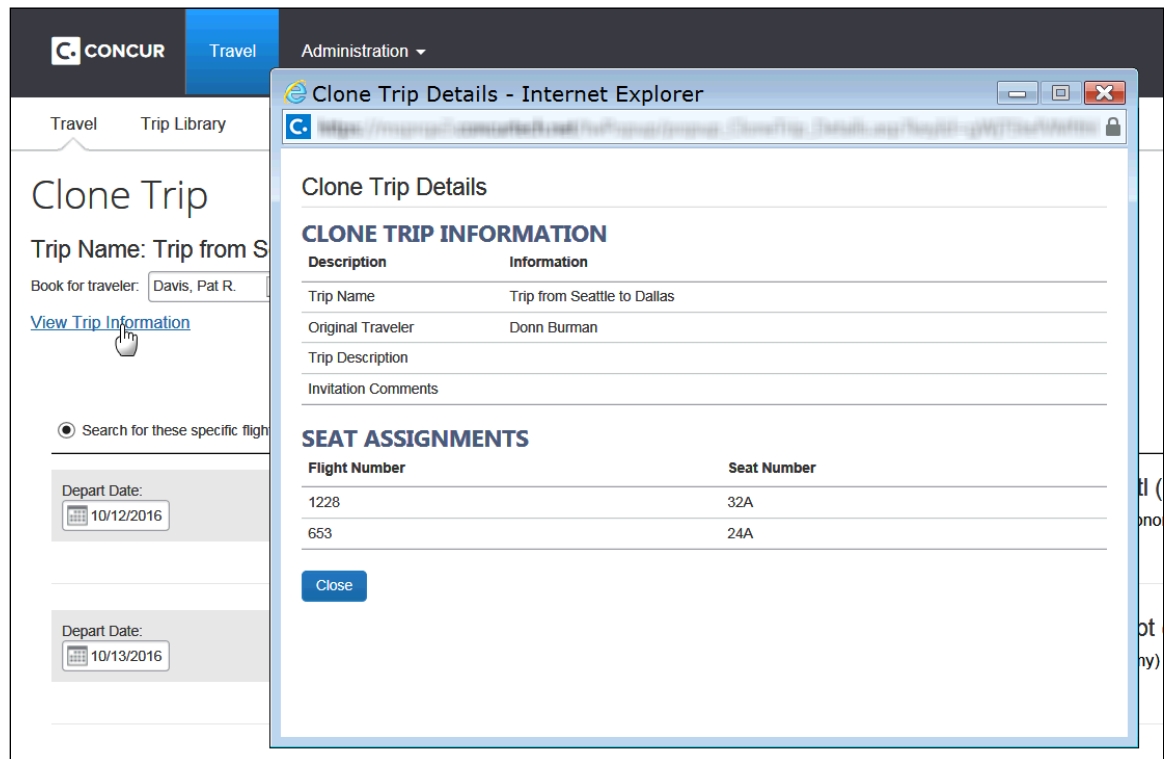
- **Search for these specific flights** to use the exact flights in the cloned itinerary
– *or* –
- **I would like to do a general search** to customize the search criteria:

☒ Search for these specific flights
 ☐ I would like to do a general search
 ☐ Refundable only air fares

Depart Date:

Seattle Tacoma Intl Arpt
 American Airlines (AA) Flight N

The user/arranger can also click **View Trip Information** to display the **Clone Trip Details** page.



On the **Clone Trip** page, the user/arranger clicks **Next**.

A warning appears if:

- The trip date for the clone trip conflicts with an existing trip's date for the user.
- The user is in a different travel configuration.
- The user has a different travel policy rule set.
- The trip is associated with a meeting.

The search results appear. The user/arranger makes the desired changes to book the cloned trip.



Refer to *The Search Process/Class of Service* section of this guide.

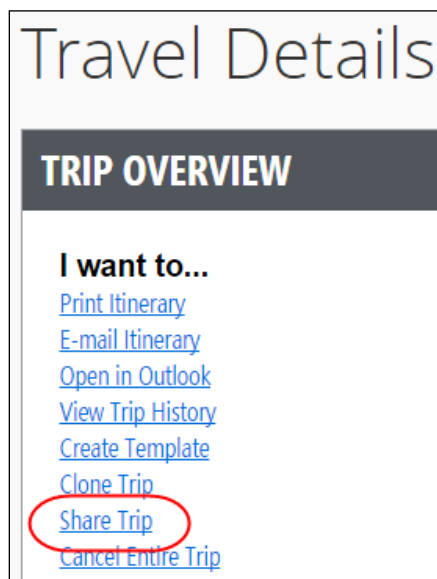
Share a Trip

A user/arranger can share a trip with any other user in your company.

To get started:

- If a **user** is sharing a trip, the user locates the desired trip and then opens the itinerary.
- If an **arranger** is sharing a trip, the arranger selects the desired user in **Profile > Acting as other user**, locates the desired trip, and opens the itinerary.

Then, the user/arranger opens the desired itinerary. In the **Trip Overview** section, the user/arranger clicks **Share Trip**.



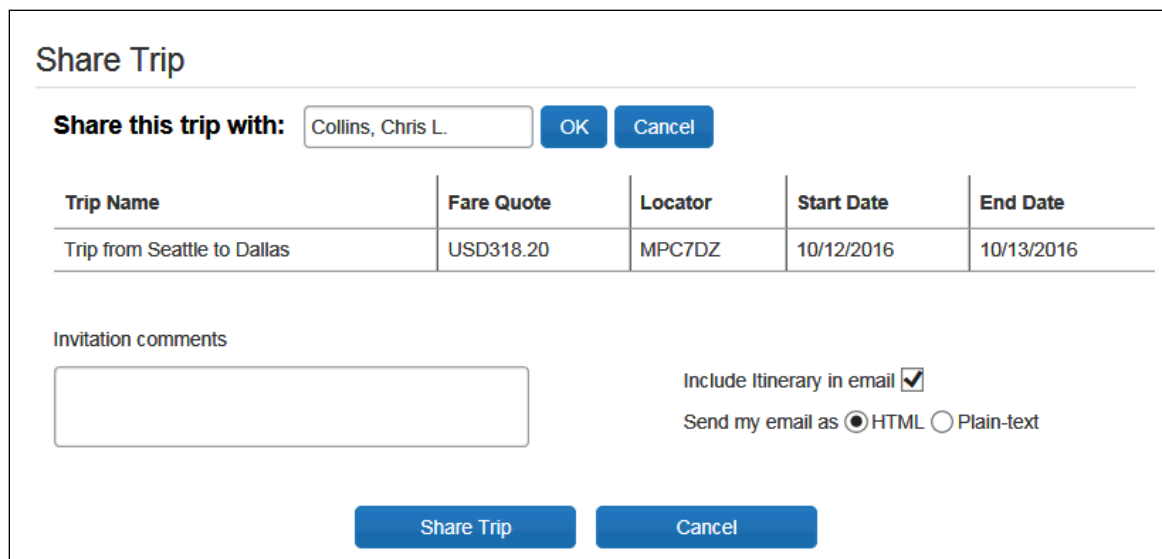
Travel Details

TRIP OVERVIEW

I want to...

- [Print Itinerary](#)
- [E-mail Itinerary](#)
- [Open in Outlook](#)
- [View Trip History](#)
- [Create Template](#)
- [Clone Trip](#)
- [Share Trip](#)
- [Cancel Entire Trip](#)

The **Share Trip** page appears.



Share Trip

Share this trip with:

Trip Name	Fare Quote	Locator	Start Date	End Date
Trip from Seattle to Dallas	USD318.20	MPC7DZ	10/12/2016	10/13/2016

Invitation comments

Include Itinerary in email ☒

Send my email as ☒ HTML ☐ Plain-text

In the **Share this trip with** list, the user/arranger selects the user with whom to share the trip, enters the email address of that user, and clicks **Share Trip**.

A warning appears if:

- The trip date for the shared trip conflicts with an existing trip's date for the user.

Share Trip

Warnings ?

- Start date conflicts with invitee trip: "Trip from Seattle to Las Vegas"

Share this trip with:

Trip Name	Fare Quote	Locator	Start Date	End Date
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- The user is in a different travel configuration.
- The user has a different travel policy rule set.
- The trip is associated with a meeting.

A message appears to inform the user that the itinerary was shared successfully.

E-mail Itinerary

Itinerary has been successfully sent to db@commasavvy.com

Concur Travel adds a Trip Invitation alert on the invitee's Travel home page and send an email to the "invitee" user. The details of the shared itinerary will also be included in the email.

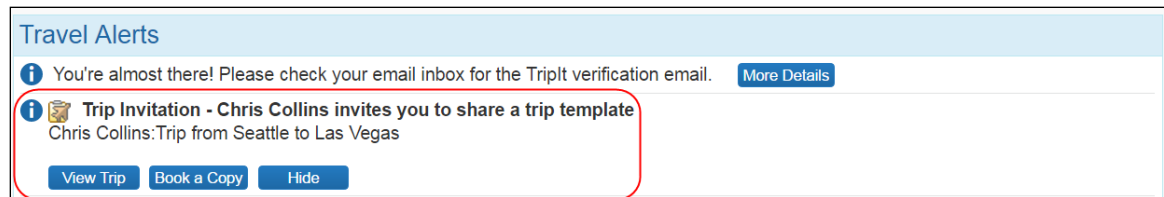


Refer to *The Search Process/Class of Service* section of this guide.

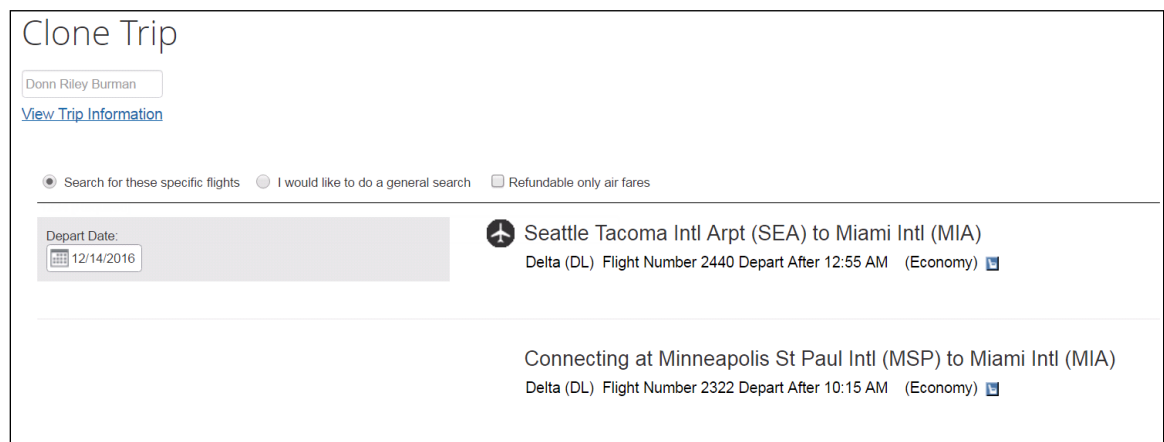
Section 4: "Invitee" User Experience – Shared Trip

Book a Shared Trip

On the Travel home page, the user clicks **Book a Copy** in the **Travel Alerts** section.



The **Clone Trip** page appears.



The user can click **View Trip Information** to display the **Clone Trip Details** screen and customize the search criteria, as detailed in the *Clone a Trip* section of this guide.

The user clicks **Next** and follow the normal steps to book a trip.



Refer to *The Search Process/Class of Service* section below.

Section 5: The Search Process/Class of Service

Concur Travel first checks for flight availability prior to running a cloned/shared trip shop. Detailed below is the logic used for displaying the classes of service that are available to be selected during a cloned/shared trip.

- If no flight availability is found for the cloned/shared trip:
 - ♦ Concur Travel informs the traveler that there is no flight availability for the specific flights requested.
 - ♦ The traveler can click **Next** to perform a general shop based on the cloned/shared trip parameters.

- If the flight availability is found for the cloned/shared trip, the traveler will be informed that availability is being searched in the classes of service allowed by the traveler's rule class.
- If additional classes of service options are available, then a class of service dropdown appears.
 - ♦ All fields are read-only except the class of service.
 - ♦ The traveler can pick any class of service and click **Next**. The itinerary will be priced in the class of service selected.
- If no additional classes of service are found and all flights are economy class, then Travel proceeds directly to price the itinerary without displaying the class of service dropdown.
- If only economy class is found, but the specific flights had either business or first class, then a dropdown with only *Economy Class* is displayed. This informs the traveler that they are not booking in the same class of service as the shared/cloned trip.

Section 6: Configuration

Professional Travel

1. Click **Administration > Travel** (on the sub-menu) > **Travel System Admin** and access the desired client travel configuration.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration** or **Travel**.

2. In the **Wizard Options** section of the travel configuration page, locate **Trip Sharing and Cloning**.

Trip Sharing and Cloning

☐ Clone Trip enabled

3. Select (enable) the **Clone Trip enabled** check box.

Standard Travel

This feature is automatically on and is not available for change. There are no configuration steps.

