

Travel: Ensuring a Successful Return to Travel

Travel Service Guide

Last Revised: August 30, 2021

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 <i>Overview</i> section with note on SAP Concur UI themes; no other changes
January 14, 2022	Updated the copyright year; no other changes; cover date not updated
August 30, 2021	Removed content related to CIBTvisas (retired this date).
August 17, 2021	Added note to <i>Seven Steps to a Successful Return to Travel</i> topic
May 27, 2021	Several updates throughout the guide
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
October 19, 2020	Changed title <i>Concur Locate</i> to <i>Partner Safety Solutions</i>
October 16, 2020	Updated <i>Air Reassurance</i> section
October 5, 2020	Initial publication

Ensuring a Successful Return to Travel

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 If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.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).

Section 2: Professional and Standard Travel

This guide discusses both Professional and Standard Travel. In those cases where a feature applies to one but not the other, that difference is noted.

Section 3: 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.

Travel Manager Tools and Resources

Many travel managers are continually reevaluating their programs and strategies, sources of savings and new traveler safety guidelines as their organization's travel resumes.

As you consider adjustments to your travel program, SAP Concur continues to release assets and support resources that provide guidance on how to adapt to the changing travel landscape and make Concur Travel and Expense programs more resilient.

These guides provide valuable insight into where and how to start building an enhanced travel program. We also encourage customers to engage with our SAP Concur experts, who will advise on efficient configuration, optimization of policy compliance, and guidance on continuous improvement with new enhancements.

SAP Concur includes a multitude of assets to help stabilize a company's Travel & Expense programs.



IMPORTANT: Consultative services are available via your Travel Engagement and/or Preferred Care manager.

Seven Steps to a Successful Return to Travel

Business travel has begun to resume. According to a March 2021 survey by TripIt from Concur, 75% of business travelers miss traveling for business – especially the benefits of face-to-face interactions, visiting new places, and time spent with colleagues. According to the same survey, a majority of business travelers (57%) plan to take a business trip in 2021 with 86% planning to fly and 48% intending to drive. But as your company resumes travel, there will be unknowns to address. Gaining visibility of travel is always a priority – now more than ever. As employees travel again, understanding new health and safety protocols and helping them navigate new steps will keep them more connected pre- and post-travel.

NOTE: SAP Concur best practice is to not allow personal, sensitive, or uniquely identifying information to be collected or stored via custom fields (i.e., profile or trip), as the data collected is not encrypted or secure. Please avoid collecting medical information, such as vaccination status, to ensure individual data is protected.

Step 1. Planning ahead is the key. Disruptions will take time to settle as cities, countries and borders re-open. A phased approach should be considered. You may find that you need to publish travel and expense policies more frequently as the travel landscape evolves.

Step 2. Be ready to adapt and stay informed. Establish a business travel resource center and remind employees to keep their profiles and emergency contacts updated.

Step 3. Harness the power of foresight with pre-trip approvals. This will provide transparency over travel spend and risk by implementing a pre-trip request and approval process. You'll gain visibility into the purpose of the trips and be able to anticipate costs.

Step 4. Guide approved travelers to make wise choices. Advise travelers to check in with your TMC Partners for unused tickets and credits available. Encourage travelers to book only flexible flights and with refundable rates.

Step 5. Build safety into pre-trip planning. Define a clear company position on protective personal equipment such as masks, and sanitizers. Determine if these costs will be expensed.

Step 6. Help travelers stay safe while travelling. What should travelers do if they feel sick while travelling? Educate your travelers on new standards and practices and help them understand contactless payments.

Step 7. Proactively manage the post-travel experience. There may be recommendations around working from home after travel to avoid visits to the office and customer sites. You can automate expense reporting. Additionally, you can provide a post-trip survey for employees to help your travel managers learn about real travel experiences. You may adapt processes, policies, and educate based on these results.

Additional Resources

- Refer to the [SAP Concur community](#) for various topics and stay connected with your peers and team members alike that are asking the same questions.
- Dedicated engagement managers are available to help answer any questions and offer any guidance.
- TMC Partners and the SAP Concur Preferred Care Program can offer additional support as you navigate during this time.
- Industry seminars are a way to learn from thought leaders and stay on top of changes.

Section 4: SAP Concur Solutions – The Travel Journey

Within each phase of the Travel Journey, SAP Concur offers the following to assist with travel management:

- **Custom text and messaging** options are available throughout. Some are subtle to gently influence behavior, and some can be prominent and require the user to acknowledge.
- Our **rich policy engine** allows for lenient or strict enforcement of corporate travel policy, tailored to the needs of each individual corporate travel program.
- **Additional tools and features** may be needed to drive behavior and enforce program changes.

Plan

The Travel Journey starts with the intent to travel, the plan.

Budget

As you begin the planning phase, you are likely thinking about budget. If you didn't have a clear budgeting process before, you may need one now more than ever.

Concur Budget can be a critical part of re-enabling travel. Managing cash flow is very important especially if the pandemic has affected your company or business unit's available funds.



To learn more about SAP Concur Budget, visit: <https://www.concur.com/en-us/budget-management>.

Concur Request

Concur Request empowers companies to intelligently manage compliance and control before spending occurs and uses sophisticated rules to direct approvals to the right level of the organization depending on the request submitted. These factors are all crucial at a time when many companies are facing financial challenges and trying to keep their employees safe.



To learn more about Concur Request, visit: <https://www.concur.com/en-us/concur-request-travel-solutions>.

Booking Switch

Concur Request includes the **Booking Switch** feature. It is a rules engine that allows the administrator to define when a trip can be self-booked (by the user) or when the trip must be agency-booked.

Rules can be defined by geography, transport mode, and date range. For instance, customers may want all international flights to be managed by a TMC, but they may want to allow domestic rail to be purchased via Concur Travel.

Company Notes

There are many messaging opportunities throughout Concur Travel, but **Company Notes** works well for general communications, such as a change to policy and provides a clear message to users about how they will be supported as they resume travel.



To learn more about company notes in Concur Travel, refer to the [Custom Text Travel Service Guide](#).

Traveler Resource Center

The SAP Concur Traveler Resource Center is available for all customers via the TripIt app as well as via a link that can be placed in Concur Travel. The site guides users to resources, such as health and safety advisories, links to the supplier's COVID responses and new travel guidelines, including airport hygiene standards. Familiarizing oneself with this information in advance of booking may influence when, where, and how travel is booked.



To visit the Traveler Resource Center, visit: <https://www.tripit.com/web/traveler-resource-center/>.

Unused Tickets

Under the umbrella of budgeting travel dollars, unused ticket management is extremely important. Utilizing credits on file is a cost-effective process for any travel program, as it delivers bottom line hard dollar savings for a customer. In partnership with your TMC, leverage some of these best practices to demonstrate value, while driving efficiencies.



To learn more about unused ticket management in Concur Travel, refer to the [Unused Tickets Travel Service Guide](#).

Third Party Meetings

The **Third-Party Meeting Registration** feature allows Concur Travel administrators and meeting planners to focus on the travel booking configuration and negotiated fares, while the third-party meeting management company manages the invitation and registration process. Many meeting partners, such as Cvent, are adding features to assist in the return to travel, such as a meeting space calculator, which planners can use to calculate meeting space needs considering anticipated attendee count and social-distancing requirements. An outdoor space and safety protocol filter allows only venues that offer outdoor meeting space and/or provide health and safety protocol information in their venue profile to appear in venue searches.



To learn more about Third Party Meetings in Concur Travel, refer to the [Third Party Meeting Registration Travel Service Guide](#).

Shop

Concur Travel includes multiple tools to assist you during the travel shopping experience.

Pop-Up Messages

The **Login Warning** feature is used to provide a travel alert to all users upon login. Since it is not contextual or specific to a defined scenario, it should only be used to message major alerts.

With Configurable Messaging, Travel Managers can define specific criteria that will trigger a message upon the user clicking search. For example, alerting users that they should use teleconference options for same day travel or that traveling to a location means a quarantine upon arrival. Whatever the case, this targeted messaging can be used to influence behavior.



To learn more about Pop-Up Messages in Concur Travel, refer to the [Configurable Message Boards Travel Service Guide](#).

Inline Messages

A less intrusive, but still effective option is in-line configurable messaging. These, too, are contextual but do not disrupt the booking flow. Administrators define specific

criteria that will trigger the message and the text appears on the search results page at the very top. This is a great opportunity to share information specific to that vertical, such as information about airport changes for flight, or hotel cleanliness policies for a hotel search.



To learn more about Inline Messages in Concur Travel, refer to the [Configurable Message Boards Travel Service Guide](#).

Air Reassurance

Specific to flights, information regarding COVID-19-related reassurances provided by certain airlines are now displayed in Concur Travel. The information is available in the **More Details** section of the Benefits/Services link for each itinerary option.

The following airlines are providing COVID-19-related reassurances:

- Air Canada
- Air France
- American Airlines
- Austrian Airlines
- British Airways
- Brussels Airlines
- Delta Air Lines
- JetBlue
- KLM
- Lufthansa
- Southwest Airlines
- SWISS
- United Airlines



To learn more about air travel-related fares, refer to the [Branded Fares Travel Service Guide](#).

Unused Tickets

Concur Travel works closely with travel managers and their TMC partners to house and display unused ticket credits in the user's profile, the home page alert section, and during the shopping process. Clear and timely messaging regarding a credit on file can drive user behavior. It is especially important after multiple travel arrangements are cancelled, as they were in the first half of 2020. Ticket credits typically expire within a year of purchase though some airlines have extended expirations; users should be aware of the applicable tickets and their expiration dates so they can use them whenever possible.



To learn more about Unused Tickets in Concur Travel, refer to the [Unused Tickets Travel Service Guide](#).

User Supplied Hotels

By enabling the **User Supplied Hotel** feature, employees are empowered to stay where they are most comfortable. This feature additionally provides visibility into an otherwise hidden location of your employee. It is a great option if your organization allows for staying with family and friends.



To learn more about User Supplied Hotels in Concur Travel, refer to the [User Supplied Hotels Travel Service Guide](#).

Travel Alternatives

In addition to being environmentally friendly, the **Travel Alternatives** feature can promote virtual conferencing over same day travel. When enabled, a user or arranger can compare the cost of using the company-approved video conference system versus the cost of airfare. For example, a user can see there is a cost savings of over \$500 by staying home and meeting virtually, in addition to the elimination of possible exposure while traveling.



To learn more about Travel Alternatives in Concur Travel, refer to the [Green Support Travel Service Guide](#).

Book

Once your organization is ready, SAP Concur manages travel booking with control and compliance, regardless of the source.

Require Approval

The Concur Travel policy engine allows you to define specific use cases, such as travel to a specific location or region, and violation level. You may want to implement policy rules with stricter enforcement, such as **Require Approval** for all international travel.

SHOW BUT DO NOT ALLOW

Another violation level to consider is **Show but do not Allow**. This option provides users visibility but prevents them from booking. This allows a travel manager to show the user what scenario triggered the violation, as well as message why it is not allowed. If the results are simply hidden, employees miss this valuable information and may book outside the tool, not knowing the option is prohibited.



To learn more about Concur Travel policy options, refer to the [Approvals, Rules, and Classes/Policies Travel Services Guide](#).

TripLink

According to a May 2021 article in *PhocusWire*, "Numerous reports suggest that hotels have seen a swing toward consumers booking direct as lockdown restrictions ease and travel resume. There are various reasons for this, ranging from trust that

had existed pre-pandemic with brands or consumers visiting websites of hotel properties to learn more about the safety and hygiene protocols being put in place". Similar trends have been reported with airlines with an April 2021 report from *The Beat* headlined "The Migration From GDSs To Airline Websites Continues".

In this new era of travel, it is critical that travel managers are aware of all bookings, regardless of where they are booked. Through TripLink, Travel Managers gain visibility, can apply policy, and realize negotiated rates on all bookings made with TripLink-connected suppliers.

TRIPLINK ADMIN CONTROLS

Organizations have varying policies on if and when direct booking is allowed for their travelers. SAP Concur recently has added additional administrative controls to TripLink that allow administrators to define policy around direct booking being encouraged for all or some suppliers or discouraged altogether and have this reflected in the end-user experience.

CONCUR TRAVEL AND TRIPLINK NOTIFY MANAGER POLICY

A key component to TripLink is visibility. Alongside that is the ability to apply policy. When considering changes to your travel policy regarding COVID-19, ensure you to mirror those changes in your TripLink bookings.



To learn more about administering TripLink, please refer to the [TripLink User Guide](#).

EY

EY's Concur Travel integration aids in understanding and mitigating the risks associated with domestic and international business travel, keeping the mobile workforce compliant, safe, and secure. To that end, EY is offering a mobility tracker via a downloadable PDF. The EY global immigration tracker helps to monitor rapidly emerging mobility issues related to COVID-19, including entry restrictions and heightened admission criteria for certain populations.



To learn more about EY in Concur Travel, refer to the [Integration with EY Travel Service Guide](#).

Travel

Concur Travel includes many tools to assist travelers while they are travelling.

Duty of Care

Duty of Care allows travel managers to know where employees are, and provides users visibility into corporate policy, security and health partnerships.

COMPANY NOTES

By adding or updating information in the **Company Notes** section, you can provide users access to your corporate travel policy, give instructions on what to do during specific events, or define what steps to take if they become sick while traveling.

PARTNER SAFETY SOLUTIONS

SAP Concur has partnered with a number of Duty of Care providers to aid in understanding and mitigating risks associated with travel. These providers are all leaders in the duty of care space and their services are enabled by the comprehensive traveler location information from Concur Travel, Concur TripLink, TripIt from Concur, and Concur Request through our Itinerary API. By leveraging an integration with these partners, customers have access to both intent-related travel data and confirmed itinerary data, providing visibility into who might be impacted as well as who is actively being impacted by an event.

Partners include:

- Anvil Group - Riskmatics®
- Crisis24 (formally WorldAware)
- Healix International
- International SOS
- Terra Dotta



To learn more about SAP Concur's Partner Safety Solutions, visit: <https://www.concur.com/app-center/category/duty-of-care>.

TripIt

TripIt from Concur is the world's highest-rated travel-organizing app. Its premium service, TripIt Pro, keeps travelers organized and one step ahead, with helpful reminders and alerts throughout their trip. Any traveler can access TripIt on their iOS and Android devices for free, with additional features available with the premium service, TripIt Pro. As part of Concur TripLink, all of a company's employees utilizing SAP Concur have access to TripIt Pro. With traveler's health and safety in mind, TripIt has created new resources and enhanced existing features, so travelers are prepared for each step of their journey.



To learn more about TripIt features, visit: <https://www.tripit.com/web/pro/>

COVID-19 TRAVEL GUIDANCE

<https://www.tripit.com/web/pro/https://www.tripit.com/web/blog>

TripIt now shows travelers the latest COVID-19 travel guidelines, restrictions and requirements for the destinations they are visiting, to help them stay as informed as possible. This guidance includes current infection rates, quarantine rules upon arrival, testing requirements, and other information travelers need to know before visiting the area. In addition, users can see airline specific COVID-19 guidance for the airlines associated with their trip. This includes information on the airline's cleaning procedures, health documentation requirements, food and beverage service, and more. Once a trip is booked, users can easily see the relevant information on COVID-19 for the destinations they are visiting and airlines they are flying with by tapping the guidebook in the trip summary screen.

With TripIt Pro, users can even search for COVID-19 travel guidance by destination in the Pro tab before they book a trip. TripIt shows pandemic-related information for 200+ countries and regions. This information comes from TripIt's partner Riskline®.

To learn more about COVID-19 Travel Guidance, visit:

<https://www.tripit.com/web/blog/news-culture/covid19-health-and-safety-features-tripit-app.html>

NEIGHBORHOOD SAFETY SCORES

The **Neighborhood Safety Scores** feature shows safety scores from 1 to 100, representing low to high risk, including a Health and Medical score that factors in COVID-19 data. This information is shown when available within each location on a traveler's TripIt itinerary for any plan with an address. Users can now set their personal risk level within the app and TripIt will identify plans in their itinerary where the safety score exceeds their threshold.

To learn more about Personal Risk Scores, visit:

<https://www.tripit.com/web/blog/news-culture/neighborhood-safety-scores-personal-risk-level.html>

NEARBY PLACES

Nearby Places is a TripIt feature that makes it easy for people to find places close to where they're staying, such as cafes and ATMs. Should someone need medical help while traveling, Nearby Places makes it easy to find hospitals, clinics and pharmacies. The feature provides the medical facility's contact details, hours of operation, and more. Users can access this feature by tapping on a trip plan and scrolling down to "Nearby Places."

To learn more about Nearby Places, visit: <https://www.tripit.com/web/blog/news-culture/find-what-you-need-most-with-nearby-places.html>

INTERACTIVE AIRPORT MAPS

Interactive Airports Maps in TripIt Pro now shows travelers COVID-19 related points of interest including COVID-19 testing sites, hand sanitizer stations, and vending machines for PPE. Within the flight details screen under **Airports**, travelers will see airport maps for their departure, layover, and arrival airports. They can select an airport that is labeled **Pro** to see an interactive map of the airport, and easily search within the map to locate gates, restaurants, charging stations, ATMs, shops and more. This feature shows users how long it should take to walk to their destination, the hours of operation and other useful information. With TripIt Pro, travelers can also search for an Interactive Airport Map in the Pro tab of the mobile app at any time.

<https://www.tripit.com/web/traveler-resource-center/Expense>

There are COVID-19 related implications throughout the travel journey, and the Expense portion is no different.

E-Receipts

Enabling and utilizing e-receipts wherever possible promotes health by avoiding touching and carrying paper receipts, with the added benefit of being in regulatory compliance.

There are some options to explore with E-receipts:

- E-receipts directly from the merchant, especially for high-risk contact like taxis (so ride share partners from our App Center can provide e-receipts).
- Corporate card transactions (without a paper receipt) can often meet regulatory requirements.
- ExpenseIt can capture a receipt image and also help create the expense from a photo or email.
- Mobile receipt capture can create an image and can meet additional certification requirements for some countries.



To learn more about E-Receipts in Concur Travel, refer to the [E-Receipts Travel Service Guide](#).

Payments

As travel returns, using contactless payments will be key to keeping travelers safe.

The World Health Organization (WHO) is advising the public to wash their hands after handling money to help stop the spread of the virus; some governments outlawed the usage of paper currency and credit card swipe machines, only allowing contactless payments. Consider corporate ghost or lodge cards as well as virtual cards, where no physical card exists.

Outside of the health benefits, the Travel Trade Gazette also reported that as a result of the pandemic a number of insurers are no longer underwriting risk associated with credit lines, it is possible therefore that some suppliers may move away from an on-account environment in future.



To learn more about payments in Concur Travel, refer to the [Forms of Payment Travel Service Guide](#).

Invoice

As travel increases, invoiced activities will also rise. Learning from the challenges of remote working, many companies want to ensure that solutions are in place to streamline and support remote work.



To learn more about Concur Invoice, visit: <https://www.concur.com/en-us/invoice-management>.

Analyze

All planning can be driven by the data you have access to through SAP Concur reporting tools.

CT Reports

Concur Travel offers multiple reports that can be helpful as a travel manager considers resuming travel.



To learn more about reporting in Concur Travel, refer to the [Travel Reporting User Guide](#).

Both the Unused Tickets and Southwest Credit Monitoring reports provide visibility into outstanding credits. They can be used to consolidate volume and dollar amounts in anticipation of communication with preferred suppliers, such as asking for extensions on expiration dates.

The guide sections *Trips Needing Approval* and *Trip Approvals* provide insight into existing travel and can be especially helpful if travel approval is only now being implemented.



For more Concur Travel-related guides, visit https://www.concurtraining.com/customers/tech_pubs/TravelDocs/available.htm.

TripLink Reports

Concur TripLink reports help aggregate data from multiple sources, including direct from supplier's sites or what is captured from a traveler's email. This data is automatically aggregated into your broader set of Concur Travel data on reports, making them more complete.

Analytics

Additional insights can be leveraged in the Analysis or Intelligence reporting products. Travel managers will focus on anticipated travel as it resumes.



To learn more about Analytics, visit: <https://www.concur.com/en-us/analytics>.

