

# **Travel: Third-Party Meeting Registration**

## **Travel Service Guide**

**Last Revised: March 22, 2024**

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
March 22, 2024	Added <i>Meeting Match for the new Concur Travel experience</i> section.
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
October 27, 2021	Small updates to <i>High-Level Meeting Attendee / Traveler Experience</i> and <i>Book a Trip</i> sections.
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
December 3, 2020	Updated <i>FAQ</i> section
March 24, 2020	Updated <i>High-Level Meeting Attendee / Traveler Experience</i> in <i>Overview</i> section; added questions to <i>FAQs</i> section
February 14, 2020	Updated <i>FAQs</i> section
December 19, 2019	Updated information under <i>Overview</i> and <i>FAQs</i>
June 24, 2019	Updated information under <i>Create a Meeting</i>
June 20, 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

Date	Revision Notes/Comments
August 21, 2018	Added a note that punchout booking flows are not supported
May 21, 2018	Added a note about masked data
April 6, 2018	Added a note about zones fares and Apollo
March 30, 2018	Added: <ul style="list-style-type: none"> <li>• FAQ about Concur Login IDs</li> <li>• FAQ about data retention</li> </ul>
January 2, 2018	Updated the copyright; no other changes; cover date not updated
Previous history removed for brevity	

# Third-Party Meeting Registration

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## Section 1: Overview

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**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.

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The Concur 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. The third-party registration company can capture the travel itineraries for reporting purposes.

## High-Level Meeting Planner Experience

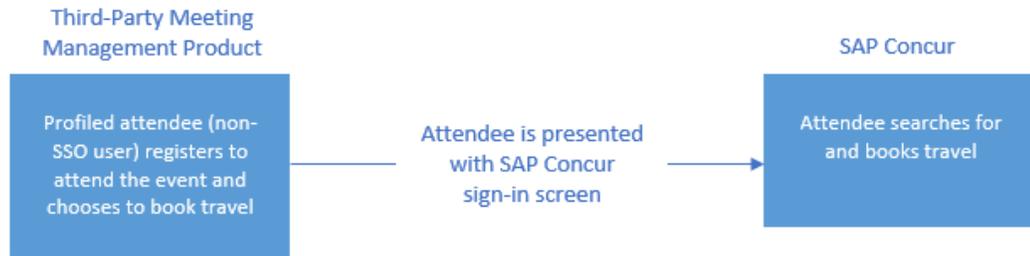


## High-Level Meeting Attendee / Traveler Experience

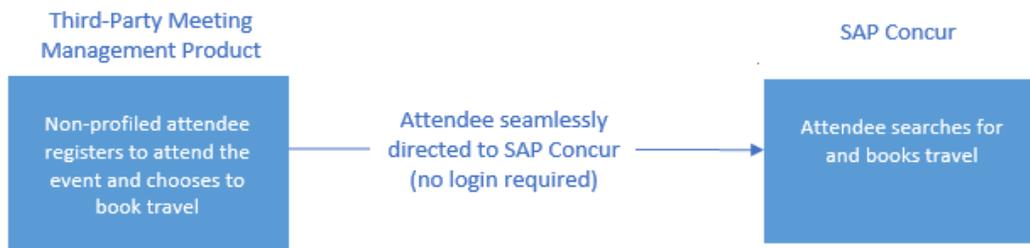
For profiled (SSO) user:



For profiled (non-SSO) user:



For non-profiled (non-SSO) user:




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**NOTE:** As of December 2019, secure login flow is enabled by default for new Third-Party Meeting feature customers in both US and EMEA data centers. All existing clients not already using the secure login flow have been instructed to do so. The secure login flow will be required in 2022.

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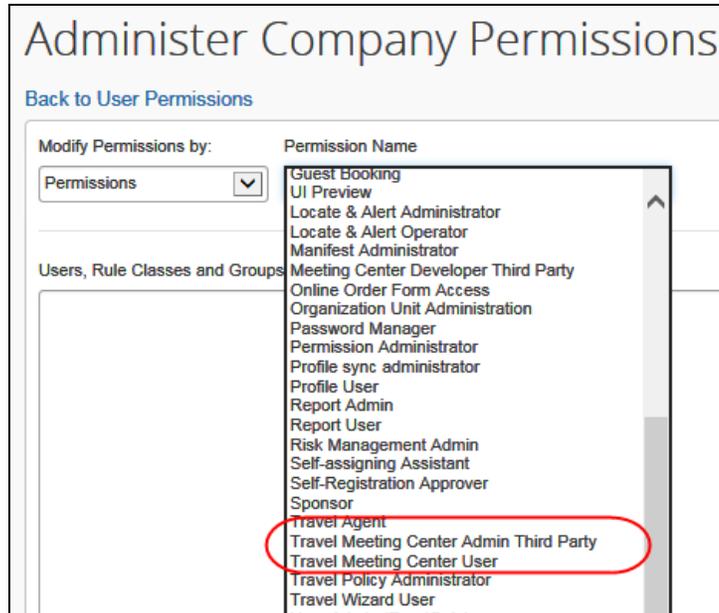
## Section 2: Getting Started / Setup

Getting started with this feature requires two steps:

1. Select a meeting management tool that is integrated with Concur Travel. That third-party vendor will demo the integration and answer any specific questions you have.
2. Then:
  - ◆ **For *direct* Travel customers:** Work with your Sales or Account Executive to order *Third-party meeting registration – New Configuration*, which will initiate a configuration project to get your site connected to the third-party vendor and conduct end-to-end testing.
  - ◆ **For *indirect* Travel customers:** Place an order for *Third-Party Meeting Integration* in the client's site for the client-selected meeting management company. A configuration project will be opened to get the site connected to the meeting management company and a configuration specialist will work with you on end-to-end testing.

## Assign Meeting Center Permissions

Once Meeting Center has been activated for the company, there will be two new options in the permissions list (**Administration > Company > Company Admin > User Permissions, Travel** tab):



- **Travel Meeting Center Admin Third Party:** Allows the user to access Meeting Administration, to view all upcoming meetings and add new meetings
- **Travel Meeting Center User:** Allows the user to view Meeting Center and launch the Travel Wizard from the **Meeting** link

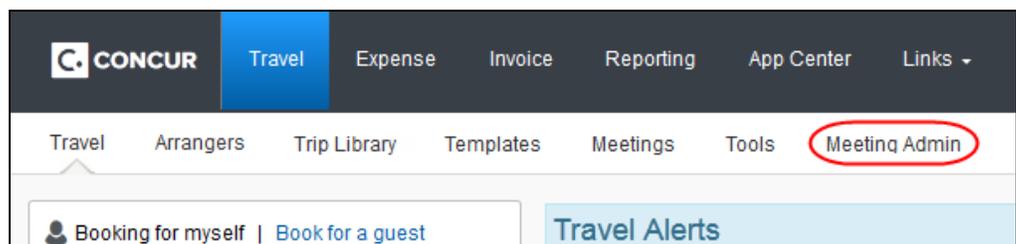
Meeting planners require access to administration and reports.

## Section 3: Meeting Admins – Create a Meeting

### Access the Meeting Center

▶ **To access the Meeting Center:**

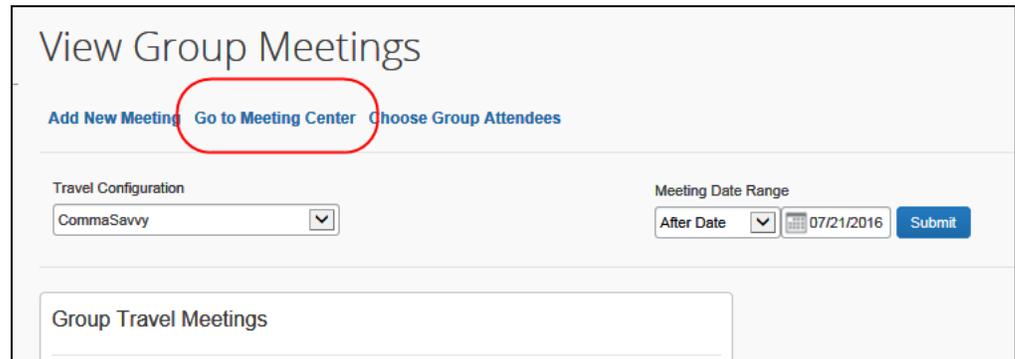
1. Either:
  - ◆ **From the Travel tab:** Click **Travel > Meeting Admin**



- or -

◆ **From Company Admin:**

- Click **Administration > Company > Company Admin.**
- Click **Travel Meeting Center Admin Third Party** (middle of the page).
- Click **Go To Meeting Center.**

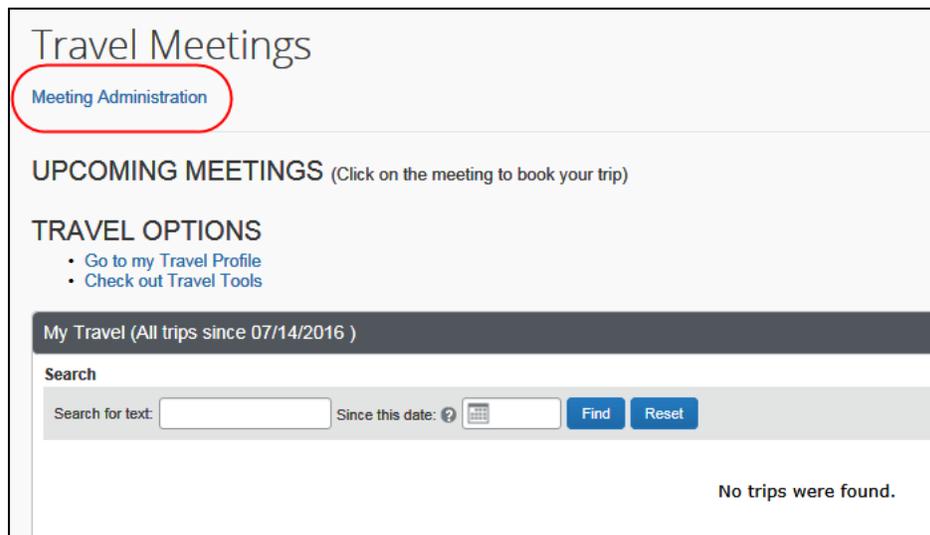


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**NOTE:** Another option is to click the **Add New Meeting** link to immediately begin creating a meeting. Using this approach, you will not see the list of upcoming meetings.

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2. Click **Meeting Administration** to add a new meeting with Third-Party Registration.



## Create a Meeting

Administrators are able to create a new meeting or view a list of all meetings for the company.

▶ **To create a meeting:**

1. Click **Create Meeting**.

THIRD-PARTY REGISTRATION MEETINGS

Please choose a meeting to edit from the list below. To create a new third-party registration meeting, click the "Create Meeting" link. To see the list of meetings available for you to attend, click the "Go to Meeting Center" link.

[Create Meeting](#) | [Go to Meeting Center](#) | [Choose Group Attendees](#) | [Go to Meeting Center Developer Page](#)

Group Travel Meetings							
Edit	Meeting ID	Meeting Name:	Access Code	Location	City Code	Start Date	End Date

2. In the **Meeting Information** section, complete the fields as described below.

**Meeting Information:**

Meeting Name:  Location Name:

For employees using travel configuration:   Always Use User's Travel Configuration

Access Code / Password:  Billing Code:  BAR/Level1 STAR:  Third party vendor:

Airport:

Exclude Airport 1:   Exclude Airport 2:   Exclude Airport 3:

Field	Description
Meeting Name	Enter a name for the meeting. Be specific for travelers who may have multiple meetings.
Location Name	Enter the location of the meeting (city, state, building, or landmark).
For employees using travel configuration	Select the travel configuration to use for the meeting. A Travel client can have multiple configurations that have different parameters assigned, for example, the fulfillment PCC, queues, etc. In most cases, there will be only one configuration to select. <b>NOTE:</b> Once you select the travel configuration, the field is locked and cannot be changed.
Always Use User's Travel Configuration	Select (enable) this check box so that the profiled traveler's/ attendee's own travel configuration is used for the meeting. This allows multiple configurations to use one meeting for registration.

Field	Description
Access Code/ Password	This password is used by Third-Party Registration sites when users log in to Concur Travel for this meeting. Meeting planners create the access code in Concur Travel can provide it to the Third-Party Registration tool. <b>NOTE:</b> An access code of 8 characters or more is required.
Billing Code	If applicable, enter the billing code. This data may be stored in the billing section of the trip/PNR if the PNR has been modified to display this data.
BAR/Level 1 STAR	If applicable, enter a meeting-level BAR/Level 1 Star in addition to the normal one for the company. Typically, this BAR/Level 1 Star has meeting information that should appear in the PNR. <b>NOTE:</b> The BAR/Level 1 Star for the meeting will be merged with the profile BAR/Level 1 Star in the reservation.
Third party vendor	Select the third-party vendor for this meeting.
Airport	Select the destination airport where travelers will be flying to attend the meeting. There are natural hub cities that contain several airports to search such as San Francisco (SFO), San Jose (SJC), and Oakland (OAK). One or more of the additional airports in the hub may be excluded. This option offers meeting-level flexibility to control the airports that travelers can select.

3. Scroll down to the **Dates** section and complete the fields as described below.

**Dates**

Start Date:  09:00 am   
End Date:  05:00 pm

Meeting Match requires onetime activation, per company travel configuration, through the Concur support desk prior to using the feature.

Enable Meeting Match for this meeting

Matching Start Date   Matching End Date

Travelers should arrive 3  hours before meeting start  
Travelers should depart 3  hours after meeting end

Time Zone: (for calendar entries)

Field	Description
Start/End Date	Select the dates/times when attendees are expected to be present at the meeting location.
Enable Meeting Match for this meeting Matching Start/ End Date	Select (enable) this check box to use Meeting Match. These fields capture attendees booking travel reservations outside of the registration process.
Travelers should arrive/depart...	Select the appropriate number of hours before and after the meeting.

Field	Description
Time Zone	Select the time zone for the meeting location.

4. Scroll down to the **Meeting Description** section and complete the fields as described below.

Field	Description
Meeting Description	Enter the meeting description. Information and images in the editor will appear under the <b>Upcoming Meetings</b> and <b>Self Registration Meetings</b> sections.

5. Scroll down to the **Rules Enforcement** section and complete the fields as described below.

Field	Description
Rules Enforcement	Define the acceptable arrival and departure date/time window. Set a rule to <i>Notify Manager</i> , <i>Log for Reports</i> , or <i>Require Approval</i> if the arrival is not within the time window. The rule is evaluated after a flight is selected.

6. Scroll down to the **Admin Options** section and complete the fields as described below.

**Admin Options**

Travel Policy Rules Class  
 -- User's rule class --

Allow Car Rentals       Search Travelfusion direct connect  
 Allow Hotel Bookings       Allow one-way and multi-seg flights  
 Allow Ground Bookings       Allow attendee to change destination airport / rail station  
 Maximum Companions       The meeting map screen is not supported in this version of the UI

Search Flights By:  
 Best Price  
 Best fit to schedule

Field	Description
Travel Policy Rules Class	Select the travel class to be used for the meeting. A specific travel class can be selected for all meeting attendees or the user's assigned travel class can be selected, in which case the travel class may vary between travelers.
Allow Car Rentals	Select (enable) this check box to allow the traveler to book a rental car.
Allow Hotel Bookings	Select (enable) this check box to allow the traveler to book a hotel.
Allow Ground Bookings	Select (enable) this check box to allow the traveler to book ground transportation.
Maximum Companions	Select the number of companions allowed. <b>NOTE:</b> Companions of meeting attendees is not commonly used and support for fixes is limited.
Search Travelfusion direct connect	Select (enable) this check box to include web air options for air bookings and web hotel options for hotel bookings.
Allow one-way and multi-seg flights	Select (enable) this check box to allow the traveler to deviate from a simple round-trip reservation.
Allow attendee to change destination airport/rail station	Select (enable) this check box to allow the traveler to use an airport or rail station outside of the meeting parameters.
Search Flights By	Choose one of these: <ul style="list-style-type: none"> <li>• Best Price</li> <li>• Best fit to schedule</li> </ul>

7. Scroll down to the **TravelConfig Ghost Card Information** section and complete the fields as described below.

**TravelConfig Ghost Card Information**

Card Type:      Card Number:      Expiration Date: (may be required for Visa)

Field	Description
Card Type, Card Number and Expiration Date	<p>Most common: Leave this field blank. Enter or select as appropriate for the meeting.</p> <p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>The ghost card specified here will not work for some non-GDS content. To use direct connects and other non-GDS content, please specify the ghost card in the necessary travel configurations.</li> <li>The card number is masked for security reasons.</li> </ul>

8. Scroll down to the **Postback URL** section and complete the fields as described below.

Postback URL

Postback URL (This URL will be provided by your third party vendor)  RegWeb 5.0  ARM

Field	Description
Postback URL	<p>Most common: Leave this field blank.</p> <p>Less common: Specify the URL provided by your third-party meeting management provider in this field.</p> <p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>Some third-party meeting management sites require user-specific Postback URLs, which contain information in the query string. Placing a root URL in this field will not allow Concur Travel to post trip details to third-party meeting management sites that require user-specific details in the URL.</li> <li>The Postback URL provided in the XML when the user is passed from the third-party site to Concur Travel overrides any URL placed in this box.</li> </ul>

9. Scroll down to the **Airline Discount** section. Many airlines offer meeting or group fares. The agreement that is provided by the airline contains the data to be entered and must first be added to the PCC/SID/Office ID to be used in the Concur Travel. Your travel management company is familiar with the correct GDS discount formats.

Airline Discounts

Discount1

Airline:  Discount Code:  Promo Code:  Days Advance:  Min Nights:  Valid From:  Valid Until:

Allow Codeshares  Saturday Night Stay Required

Zone fare class of service

Discount Type:

Notes:

Field	Description
<all fields>	Enter or select as appropriate. <b>NOTE:</b> <ul style="list-style-type: none"> <li>The <b>Discount type</b> list is the most important part of this set up. The discounts must be processed through ATPCO in order to be visible on the Travel air search results screen.</li> <li>Zone fares are not supported for Apollo.</li> <li>The discount code is masked for security reasons.</li> </ul>

10. Click **Submit**.

When the meeting is saved, Concur Travel assigns a Meeting ID number. Concur Meeting administrators can click the **Edit** link to view the details of the meeting and make modifications.

Third-Party Registration Meetings  
Please choose a meeting to edit from the list below. To create a new third-party registration meeting, click the "Create Meeting" link. To see the list of meetings available for you to attend, click the "Go to Meeting Center" link.

[Create Meeting](#) [Go to Meeting Center](#) [Choose Group Attendees](#) [Go to Meeting Center Developer Page](#)

Group Travel Meetings							
Edit	Meeting ID	Meeting Name:	Access Code	Location	City Code	Start Date	End Date
<a href="#">Edit</a>	64981781	Ignite 2015 Final	concur		SEA	10/14/2014 02:00 pm	10/16/2014 12:00 pm

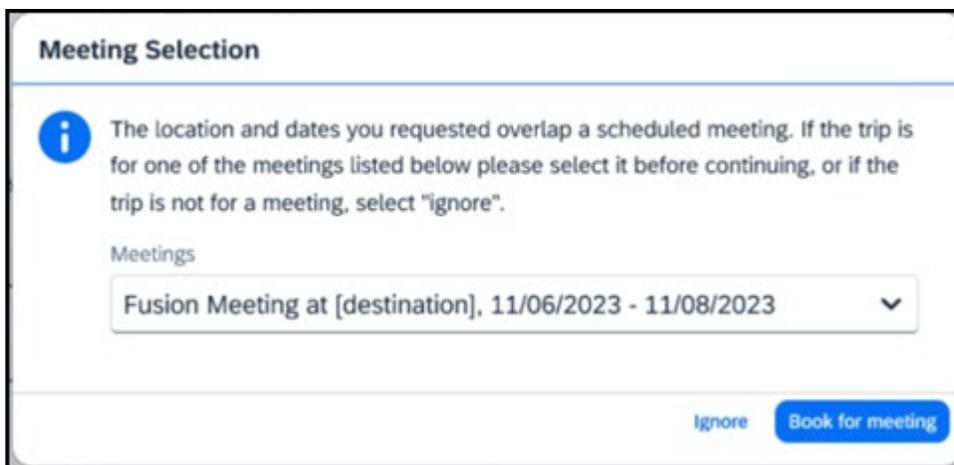
[Attendees](#)

The meeting name and ID number can also be added to the PNR / Reservation if needed. The travel management company must be familiar with file finishing methods.

On the Third-Party Registration Meetings main screen, after the meeting has been created, click the **Attendees** link to define users and groups who may view the newly created meeting.

## Meeting Match for the new Concur Travel experience

After a user begins the search, if a meeting match is detected based on the location and dates of the search, the user will see a popup message about the detection.



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**NOTE:** The location that displays next to the meeting name in the dropdown list is the same as the **Location Name** entered by the administrator in the **Group Meeting Creation** admin page.

**NOTE:** The dates that display for each meeting line item in the dropdown are the same as the **Start Date** and **End Date** information entered by the administrator in the Group Meeting Creation admin page. The dates used for the meeting match check are the dates entered in the **Matching Start Date** and **Matching End Date** fields on the **Group Meeting Creation** admin page.

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## **NO MEETING MATCH**

If the user confirms that the presented meetings are not applicable, the popup message will close, and the page will automatically redirect to the next page in the booking workflow within the new experience.

## **MEETING MATCH**

If the user selects one of the presented meetings from the dropdown list, they can then click **Book for meeting**. The page will redirect to the meeting workflow, available in the legacy experience for Concur Travel.

Important notes to consider with the redirect and flight search:

- If a round trip flight search matches a meeting, the user will be redirected to the flight results page in the legacy experience.
- If a one-way flight search matches a meeting, the user will be redirected to the **Flight Information** page in the legacy experience. If the meeting configuration does not allow users to book a one-way flight to the meeting, the user must enter data for the return flight there.

Important note to consider with the redirect and rental car or hotel search:

- If a rental car or hotel search matches a meeting, the user will be redirected from the new experience **Search** tab to the **Flight Information** page in the legacy experience and the meeting booking workflow for flight.

Important note to consider with the redirect and rail search:

- If a rail search matches a meeting, the user will be redirected to the **Flight Information** page in the legacy experience and the meeting booking workflow for flight.

Important note to consider with the redirect and trip custom fields:

- If trip custom fields are configured to display at the beginning of the workflow AND at least one of those custom fields is enabled for meetings, the redirect will be to the trip custom fields page within the meeting workflow in the legacy experience, and next to the flight results page or the **Flight Information** page.

## CONFLICTING TRIP AND MATCHING MEETING

If a conflicting trip AND a matching meeting are detected, two popups in a row will display. The first one displays for conflict detection, then the second for the meeting match.

## Section 4: Meeting Attendees – Booking

### Book a Trip

Starting from the third-party meeting registration tool, the user will click on a button to book travel, which will bring them to Concur Travel where the Travel Wizard will automatically display the destination city.

The traveler modifies the defaulted dates and provides the departure airport.

The screenshot shows the 'Flight Information' form. At the top, there are radio buttons for 'Round Trip' (selected), 'One Way', and 'Multi-Segment'. Below this is the 'Departure' section with a text box for 'Departing from ...' containing 'AUS - Bergstrom Intl Arpt - Austin, TX', a 'Depart date:' field with '10/14/2014' and '(mm/dd/yyyy)' placeholder, a 'Schedule flights to ...' dropdown set to 'arrive' with a time dropdown set to '12:00 pm', and an 'Include flights within:' field set to '3' hours. The 'Return' section has a text box for 'Departing from ...' containing 'SEA - Seattle Tacoma Intl Arpt - Seattle, WA', a 'Return date:' field with '10/16/2014' and '(mm/dd/yyyy)' placeholder, a 'Schedule flights to ...' dropdown set to 'depart' with a time dropdown set to '03:00 pm', and an 'Include flights within:' field set to '3' hours. Below the return section is a checkbox for 'Find a Hotel' and a 'Class of Service:' dropdown set to 'Economy class'. At the bottom, there are three columns of search options: 'Search carriers using:' with radio buttons for 'Personal and company preferences' (selected) and 'I will select carriers to search'; 'Search flights based on:' with radio buttons for 'Best price' (selected) and 'Best fit to schedule'; and 'Limit search to:' with checkboxes for 'Refundable only air fares' and 'Flights w/ no double connections'. At the bottom right are three buttons: 'Start Over', '<< Previous', and 'Next >>'.

If allowed per meeting policy, the user selects the desired check boxes to reserve a hotel or rental car. The user clicks **Next**.

The Travel Wizard displays flights based on the search flight options chosen.

The user continues to the end of the Travel Wizard to complete the reservation. Once completed, the traveler signs out or closes the browser.

## Section 5: FAQs

**Q.** If an attendee already has an SAP Concur profile, will it be used when booking travel?

**A.** Yes, as long as a match is made with the Login ID, then the attendee's profile will be utilized.

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**NOTE:** The third-party vendor must pass the "UseCliqbookProfileData" attribute in the XML post.

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**Q.** Can meeting attendees that don't have a profile in my Concur Travel site book travel?

**A.** Yes. Third-Party Meeting Registration allows the registration site to transfer the necessary details to create a one-time-use profile to book travel for that attendee.

**Q.** What if my SAP Concur Login IDs are not my employee email addresses?

**A.** The best practice is to load the actual Login IDs into the third-party registration tool and configure that tool to send that field instead of the email address. Please work with your third-party meeting management provider to configure this.

**Q.** Can attendees choose different arrival and departure dates/times within the third-party meeting?

**A.** In Concur Travel, the arrival and departure city – along with the arrival and return dates and times – are populated based on the meeting settings. Deviations are possible and managed through the Concur Meeting Admin page.

**Q.** When creating a meeting in the third-party solution, can the meeting information be pushed over and pre-populated into the Concur Third-Party Meeting Administrator?

**A.** The meeting must be configured both on Concur Meeting Admin and in the third-party solution. The Meeting ID is the shared link between the two products.

**Q.** Does Third-Party Meeting Registration support Meeting Match?

**A.** Yes, but only on desktop/web. When the Meeting Admin enables Meeting Match, users on desktop/web who search for travel to the destination outside of the meeting flow will be redirected to the meeting flow instead. Meeting Match does not affect searches in the Concur Mobile App.

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**NOTE:** Details of travel booked from Meeting Match might not be sent back to the third-party meeting management product if user-specific Postback URLs are required.

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**Q.** Does Third-Party Meeting Registration support Concur Mobile?

**A.** No, not at this time. However, users can use the desktop experience in their mobile browser if they wish.

**Q.** What do I do if my travelers are having trouble booking or ticketing air reservations for non-GDS content with the ghost card I specified in the meeting configuration.

**A.** Rather than specify a ghost card in the meeting configuration, add it in the necessary travel configurations.

**Q.** Does Third-Party Meetings support all content that I use in my transient site?

**A.** No. However, SAP Concur is looking to close this gap as part of a re-architecture of the Third-Party Meetings solution in the future. Some notable content gaps are any punchout booking flows, rail, and special features like Air Canada Flight Pass.

**Q.** Can Third-Party Meetings populate Concur Request in a Travel – Request integration setting?

**A.** Though the Third-Party Meetings module can be activated in a Concur Travel – Request integrated setting, the Third-Party Meetings module will not populate Concur Request.

**Q.** Can Travel Arrangers/Assistants book travel for meeting attendees?

**A.** Yes. The Arranger needs to be set up as an authorized travel arranger in the meeting attendees' Travel Settings section in Personal Profile. Please refer to the *Concur Travel \* Client Fact Sheet – Delegate/Proxy/Assistant/Arranger* document for more information.

**Q.** Is the Third-Party Meeting Registration feature available in EMEA data center?

**A.** Yes.

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**⚠ IMPORTANT:** Clients should work with their meeting registration vendor to ensure the registration tool is pointed to the correct Concur data center. Every Concur Travel client (Company ID) is hosted in a single data center. It is not possible for a single Company ID to exist in multiple data centers.

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