Job Aid: Cloning and Sharing Trips in Concur Travel

**Cloning a Trip** in Concur Travel starts a booking process with the identical parameters of an existing itinerary. You can then modify those parameters as needed. You can clone an itinerary for yourself or on behalf of anyone that has selected you as a Travel Delegate in their Concur Profile. Those that have the role as Travel Arranger can Clone Trips for Guests.

**Sharing a Trip** in Concur Travel sends an email to the Invitee and adds a travel alert to the Invitee's Travel home page. The Invitee can then book a trip, starting with the same parameters as the shared trip and modify as needed. You can Share a Trip with any Concur Traveler at the University, regardless of role.

#### **Cloning a Trip**

1. View the trip you want clone under the Upcoming Trips tab.

Travel Arrangers Trip Library Templates	Tools				
Booking for myself     Book for a guest	Travel Alerts				
	You have unused tickets				
	Company Notes Upcoming Trips				
Mixed Flight/Train Search	Trip Name/Description	Status	Start Date	End Date	Action
Round Trip One Way Multi City	Trip from New York to Atlanta (DSKBUG)	On hold by user Trip will be automatically cancelled at:	12/01/2020	12/01/2020	Cancel Trip
Departure city, airport or train station		04/03/2020 11:00 pm Eastern			
Arrival city, airport or train station Find an airport   Select multiple airports					

2. Click the Trip Name/Description to view the Travel Details.

Trip Summary		инэ. И	
Finalize Trip Review Travel Details Enter Trip Information Submit Trip Confirmation	I want to Print linerary E-mail linerary Come Trup History Create Template Chore Trup Cancel Entre Trup	V Trip Name: Trip from New York to Atlanta (E89) Start Date: December 01, 2020 End Date: December 01, 2020 Created: April 02, 2020, William Never (Modiffed: April 02, 2020) Description: (No Description Available) (Eas) Agency Record Locator: DSKBUG Passengers: William Testa Never Total Estimated Cost: \$103.22 USD (Details)	Add to your Itinerary
		Inis trip is on hold. The last time to send it to your agency is: 04/03/2020 11:00 PM Eastern Change frequent flyer program	

- 3. Click Clone Trip from the I want to list. The Clone Trip screen appears.
- 4. Select from **Book for traveler** dropdown. The list consists of those travelers that have made you a Travel Delegate in their Concur Profile. If you have the role of a Travel Arranger, you see the option for Guest Traveler.



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#### 5. Select to **Search for these specific flights** to search for that exact flight indicate below.

part Date: 12/01/2020	New York LaGuardia Airport, New York, NY, United States of America (LGA) to A Hartsfield-Jackson Intl Airport, Atlanta, GA, United States of America (ATL)	tlanta
	Anterioran Anteriora (ASY Fright Rentine) 4404 Depart Anterio, 40 Ann (LOURDIN) 🖬	

Or, I would like to do a general search based on the Trip destination with different flight options.

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

Depart Date:			
12/01/2020			
Depart Time:			
Depart After V	9AM	▼ +/- 2 ▼ hours	

In our example, we will select to **Search for these specific flights** so that we can book the same flight for our traveler.

6. Click Next. The dropdown option appears to select fare class. Select if desired.

Search for these specific flights I would like to do a general search	rch 🔲 Refundable only air fares
Depart Date:	New York LaGuardia Airport, New York, NY, United States of America (LGA) to Atlanta Hartsfield-Jackson Intl Airport, Atlanta, GA, United States of America (ATL) American Airlines (AA) Flight Number 4484 Depart After 9:40 AM
	Cancel Next

7. Click Next. The matching search result appear.

Total Estimated Cost	Hide matrix Print	/ Email				
Air USD 103.22 TotalUSD 103.22	All 147 results	<b>A</b> Delta	American Airlines	<b>N</b> United	🔻 Multiple	Linear Air
Change Search		Preferred				
From LGA - New York LaGuardia Airport - New York, NY	Nonstop 7 results	5 results	1 results	1 results	-	-
To ATL - Atlanta Hartsfield-Jackson Intil Airport - Atlanta,	1 stop 78 results	39 results	13 results	19 results	7 results	-
Find an airport   Select multiple airports Depart	2 stops 62 results	12 results	36 results	13 results	-	1 results
12/01/2020 dep • 09:00 an • ±2 •	Selected Fa	re				
Economy class	Amer	ican				Remove \$
Specify a carrier  Refundable only air fares	Airline	09:40a L	$GA \rightarrow 12:07p ATL$	Nonstop	2h 27m 🛕	View Fares
Search		<sup>1</sup> American Air EAGLE	lines 4484 operated by REPUBLIC	CAIRWAYS AS AMERICAN		
	Least Cost Log	jical Fare				Show all details
Segment: 1 - Tue, Dec 1						
Depart 07:00 A - 11:00 A	Shop by Fares	Shop by Schedul	e			
Arrive 09:35 A - 11:02 P	Available Flights	Tue, Dec 1 09:00 A ± ho	urs			
					Displaying: 146	out of 147 results.

8. Make your selection, reserve and purchase tickets as you would normally. **Note:** *You are acting as the Traveler you selected when beginning to Clone the Trip.* 

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#### **Sharing a Trip**

1. View the trip you want Share under the **Upcoming Trips** tab.

					Help 🗕
SAP Concur C Travel App Center					Profile 🗕 💄
Travel Arrangers Trip Library Templates	Tools				
Sooking for myself   Book for a guest	Travel Alerts				
♠ 🕿 🛏 😡	You have unused tickets				
Mixed Flight/Train Search	Trip Name/Description	Status	Start Date	End Date	Action
From O	Trip from New York to Atlanta (DSKBUG)	On hold by user Trip will be automatically cancelled at: 04/03/2020 11:00 pm Eastern	12/01/2020	12/01/2020	Cancel Trip
Experiment of the second					
Arrival city, airport or train station Find an airport   Select multiple airports					
Search					
Show More					

2. Click the Trip Name/Description to view the Travel Details.

Trip Summary	Travel Deta	ails	
Finalize Trip	TRIP OVERVIEW	v	
Review Travel Details Enter Trip Information Submit Trip Confirmation	I want to Print timerary Open in Outlook View Trip History Create Template Clore Trip Stare Trip Cancel Entire Trip	Trip Name: Trip from New York to Atlanta (Eds) Start Date: December 01, 2020 End Date: December 01, 2020 Created: April 02, 2020, William Never (Modiffied: April 02, 2020) Description: (No Description Available) (Eds) Agency Record Locator: DSKBUG Passengers: William Testa Never Total Estimated Cost: \$103.22 USD (Details) Total Estimated Cost: \$103.22 USD (Details) It is trip is on hold. The last time to send it to your agency is: 04/03/2020 11:00 PM Eastime	Add to your ltinerary
	RESERVATIONS	3	

3. Click Share Trip from the I want to list. The Share Trip screen appears.

Share this trip with:	ez2248@columb	bia.edu	ок	Cancel		
Trip Name		Fare Quote		Locator	Start Date	End Date
Trip from New York to Atlan	ta	USD103.22		DSKBUG	12/01/2020	12/01/2020
	Sha	re Trip		Cancel		
	Sha	re Trip		Cancel		

- 4. Enter the email address of the Concur Traveler for whom you want to Share this Trip with.
- 5. Type any optional Invitation comments and click Share Trip.

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# **Getting Help**

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>

Or, you can contact the Service Center by phone: (212) 854-2122