CONCUR ADA-FUNDED VOLUNTEER TRAVEL OVERVIEW

Concur Travel is an online travel reservation booking tool that allows ADA / CODA volunteers to make funded travel reservations online 24/7. The ADA's travel policy is built into the tool as are all authorized ADA meetings and volunteers.

Fox World Travel, the ADA's official travel management company, maintains the Concur site and is responsible for the issuance of all travel documents – electronic tickets and travel confirmations.

Travel reservations for funded volunteer travel can be made via Concur Travel or with a Fox World Travel agent. There are some travel exceptions that cannot be made via Concur and those are listed below.

We thank you for traveling on behalf of the ADA and CODA.

CONCUR EXCEPTIONS – if your travel involves one of these scenarios call and speak to a Fox agent:

➢ You cannot make **one-way reservations via Concur**. If you should happen to do this, Fox World Travel will contact you for a personal credit card or to look at lower fare alternatives.
➢ If you are **combining personal travel with ADA-funded travel,** you must call and speak to an agent. There is a $33.00 service fee for each ticket issued when talking to an agent, this includes two credit card split payment transactions.
➢ If you want to upgrade to first class or fares such as Delta Comfort, you must call and speak to a Fox agent.
➢ You can only make one reservation (for yourself) via Concur. Companion travel must be booked via the –BOOK FOR A GUEST- tab, with a Fox agent or via your airline's website.

OTHER IMPORTANT TRAVEL INFORMATION:

➢ Airline, car rental and hotel reservations can all be made on the same reservation at the same time. This primarily applies to CODA site visitor travel.
➢ You can make Amtrak reservations via the online system.
➢ You can make Southwest Airlines and JetBlue Airways reservations via the online system.
➢ You can purchase Southwest EarlyBird Check-In via the Southwest app.

- The ADA does not book travel on Spirit Airlines, Allegiant Air, Sun Country or similar carriers with poor customer service.
- Authorized travel will be charged to the ADA credit card automatically. You should not attach a copy of your Fox World travel confirmation to your ADA expense report – either in Concur or to a paper expense reimbursement form.
- A good travel resource is the ADA Fox World Travel Portal. You can create an account to use the portal to access these resources. If you lose your confirmation, you can also use the Fox instant invoice system via the portal.

- You can (and should) cancel reservations made via Concur in Concur. Once a travel reservation is cancelled qualified non-refundable future use tickets are added to individual travel profiles automatically. You can also call Fox World Travel to cancel your reservations.
- All received approved meetings are loaded into Concur. At the end of the process, you will be asked to choose your meeting. You will have received instructions from your ADA /CODA meeting organizer as to the correct meeting name to use.
- The *ADA Volunteer Travel and Expense Policy* is built into Concur. Any travel that is booked outside policy will be sent to Pat Murphy for review. Pat will also receive a copy of every traveler's confirmation and will review for adherence to policy, lower airfare options and correct meeting information.

Fox World Travel Phone and Online Reservations
- **Book via Phone:** Toll-free: **844-319-2892**   Direct: 312.361.0144 Hours: 7:00am-5:30pm Central
- E-Mail: ada@foxworldtravel.com
- **Online Help: online@gofox.com**

- **Book Online:**   www.concursolutions.com
   - You need your ADA-supplied **Username**, **First Time Password**, **Meeting Date/City** and **Name of Your Meeting** for access to 24/7 online travel.
   - 'changeme' is the password to use the first time you login. Create your travel profile preferences and a new password. Jot down your new password and keep it for future online travel use. You will not be asked to change your password again.
   - Password Resets E-Mail: murphyp@ada.org

Changeme1 is your password for the first time that you login to Concur. Once logged-in create a travel profile and <mark>change your password to something that you will easily remember.</mark> For future ADA-funded trips use your new password.

Sign In

Username

38678@adatravel.org

Next

☐ Remember me

Forgot username?

‹ Sign In

38678@adatravel.org
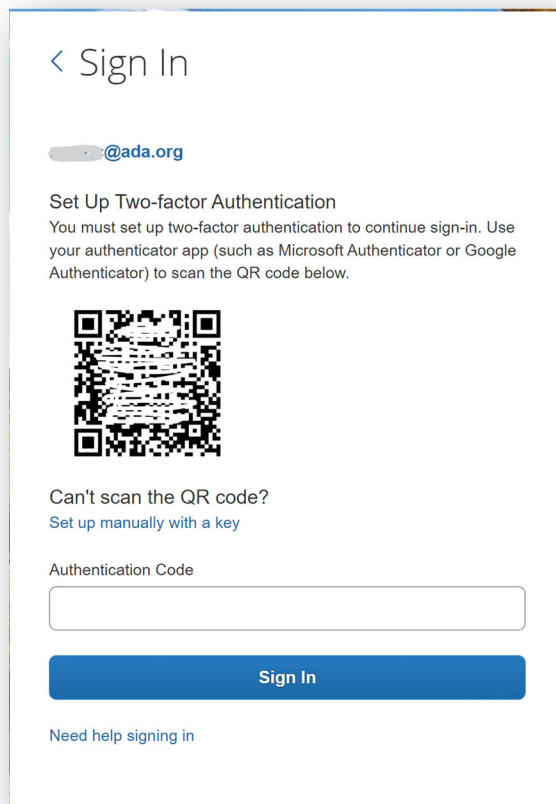
Password

Sign In

Forgot password?

Concur Passwords: **A minimum of 8 characters; one of which must be a # or a special character; must have upper- and lower-case letters.**

Once you sign-in a second layer of data security is required by Concur:

Setting up Concur MFA using the Microsoft Authenticator – for ADA Volunteers
(see the attached document for more information)

Concur now requires that all users have Multi Factor Authentication (MFA or 2FA) on their accounts. To set up MFA with Concur, please follow these steps.

1. Sign into Concur (www.concur.com) with your Concur username and password
2. After providing your valid username and password, you will see a screen like this:

‹ Sign In

████@ada.org

Set Up Two-factor Authentication
You must set up two-factor authentication to continue sign-in. Use your authenticator app (such as Microsoft Authenticator or Google Authenticator) to scan the QR code below.

Can't scan the QR code?
Set up manually with a key

Authentication Code

[   ]

Sign In

Need help signing in

You will be prompted for MFA each time you sign into Concur going forward.
1. Sign into Concur (www.concur.com) with your Concur username and password
2. Open your Microsoft Authenticator on your phone
3. Select the **SAP Concur** item and you will see a one-time pass code that is six digits long

4. On your computer, type that six-digit code into the "Authentication Code" field, then click **Sign In**
5. You will be signed into Concur as normal, please proceed with your work.

After logging in the first time, you will be required to complete your travel profile (upper right).
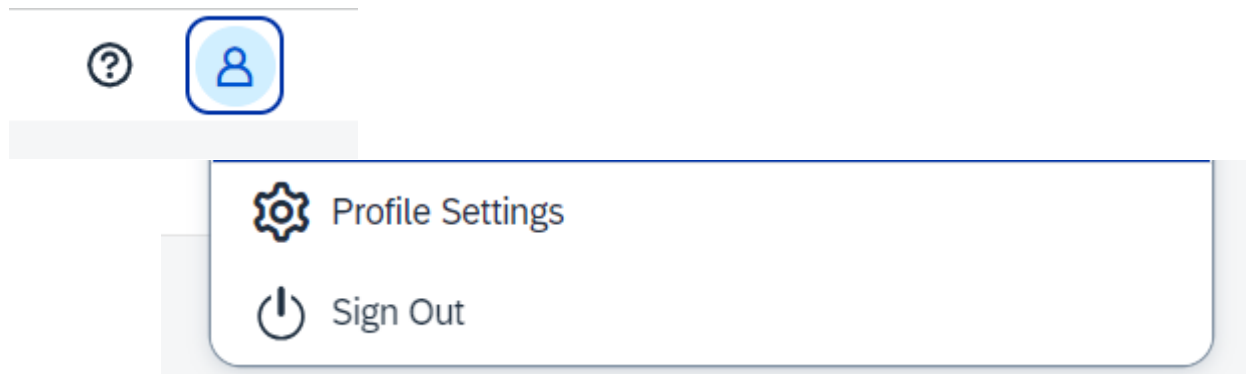
Concur Travel is totally dependent on the information that you have in your profile – so PLEASE make sure that all information is accurate before you start a travel reservation.

1. Build your profile and add (or change) your travel preferences
2. Add your emergency contact information.
3. As your preferences change, or you add frequent traveler numbers, update your Concur travel profile accordingly.
4. Confirm your TSA information (name must match your photo ID so **PLEASE** get your ID out when building your travel profile!)
5. Currently REAL ID goes into effect May 07, 2025! You may have to update your official ID name after receiving your new compliant REAL ID driver's license!!
6. Remember to **click the SAVE buttons**

IMPORTANT RESOURCE INFORMATION

Under Company Notes on the home page, you will see some important travel policy notes and some very helpful Fox World Travel Resources:
➢ **Concur Training** – recorded videos and guides that are updated frequently
➢ **Fox Portal** – get a copy of your travel confirmation instantly
➢ **Concur Status – if Concur is not operating normally, it is wise to either wait or to call and speak to a Fox agent.**

Important Note:

> Per company policy, Delta, American, and United Basic Economy fares are not visible in Concur. If you are aware of the risks and wish to book a Basic Economy flight anyway, please contact a Fox agent.
>
> *Concur displays all airfares within the American Dental Association's policy. ADA has elected not to display certain restrictive airfares that do not allow seat assignments, carry-on baggage, and other restrictions for our business travelers.*

Basic economy fares for all airlines are not shown in Concur for ADA-funded travel due to the likelihood of changes and extreme carrier-imposed restrictions.

➢ You will have the option of seeing search results via multiple views - matrix, fare, or schedule.
➢ When looking at the matrix - if you want to see non-stop flights only click on Nonstop in the far-left column.
➢ Note that you can also print /e-mail the shown travel options and fares.
➢ You can also hide the matrix and see the search results by price or by schedule. Searching via price will give you one-way options and the search by schedule gives you round-trip options. **It is recommended that you search by price.**
➢ You can add hotel and car reservations during the process. ADA-corporate rated hotels can be booked via Concur.
➢ **If your meeting has a hotel room block, follow those instructions and don't use Concur.**

There are multiple screens to go through before you reach the end of the reservation process and see the PURCHASE TICKET button. Until you click on this button your ticket is not purchased and reservations made will automatically be cancelled by Concur.

If you do not completely complete a reservation, Concur will send you an e-mail that you have a pending travel reservation. If you do not take further action, the reservation will automatically be cancelled.

Once your ticket is issued you will always receive a final travel confirmation from Fox World Travel – within a few hours of making the reservation. If you don't, either log back into Concur and finish your reservation or contact Fox World Travel at 844-319-2892.

Travel Arranger

If you are a travel arranger and you want to change the profile of one of your users:

1. Click **Profile**.

2. In the **Administer for another user** field, type the first few letters of the user's name.

3. Select the appropriate user from the search results.

4. Click **Apply**.

Access

To access the profile information:

1. Click **Profile** > **Profile Settings**. The **Profile Options** page appears.
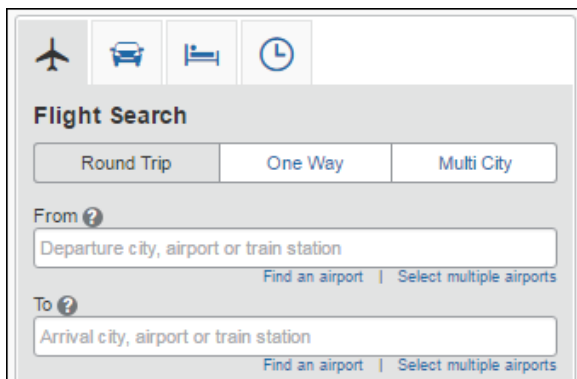2. Select the appropriate option on the left side of the page.

Booking a Flight

From the **Concur Home** page, use the **Air / Rail** ✈🚆 tab to book a flight or rail by itself or with car rental and/or hotel reservations. To book car and hotel reservations *without* a flight, use the **Hotel** 🛏 and **Car** 🚗 **Search** tabs, respectively.

You can access the Flight ✈ tab (or Air / Rail ✈🚆) by doing the following:

- On the **Concur Home** page: On the menu, click **Travel**.
- On the **Concur Home** page: On the menu, click **Home**
  OR
  On the **Concur logo** (whichever applies).

The **Flight** ✈ tab (or **Air / Rail** ✈🚆) is on the left side of the page.

Step 1: Start the Search

1. Select one of the following types of flight options:
   - Round Trip
   - One Way
   - Multi City**

   **Multi City travel cannot be booked via Concur. Please contact Fox World Travel at 844-319-2892.

2. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. When you enter a city, airport name, or airport code, Concur will automatically search for a

match.
NOTE: Use the **Find an airport** and **Select multiple airports** links as needed.

3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the appropriate time range.

4. Click the ▼ arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary, to see/reserve nonstop flights.
   NOTES:
   - The graphical display is based on flight schedule data. It will not show any rail options, nor can it take refundability or class of service preferences into account.
   - Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all the flights available for that time slot.
   - If you change locations or dates, click **refresh graph** for more data.

5. If you need a car, click the **Pick-up / Drop-off car at airport** check box.

   ☐ Pick-up/Drop-off car at airport
   ☐ Find a Hotel

   - If you need an off-airport car or have other special requests, you can skip this step and add a car later from your itinerary.

6. If you need a hotel, click the **Find a Hotel** check box. Additional fields appear.
   - Choose to search near an airport, near an address, near a company location, or near a reference point / zip code (a city or neighborhood).
   - If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel later from your itinerary.

     NOTE: Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply. **YOU WILL NOT SEE ADVANCE PURCHASE NON-REFUNDABLE /NON-CHANGEABLE HOTEL RATES IN CONCUR HOTEL DISPLAYS AT THE REQUEST OF THE ADA.**

7. You can specify an airline. Use the **Specify airline** check box, if appropriate.

   NOTE: You can only search one vendor at a time, and this will override the preferred airline searches normally done for all the frequent flyer number carriers.

   If you click the **Specify airline** check box, a list of carriers appears that are color coded:
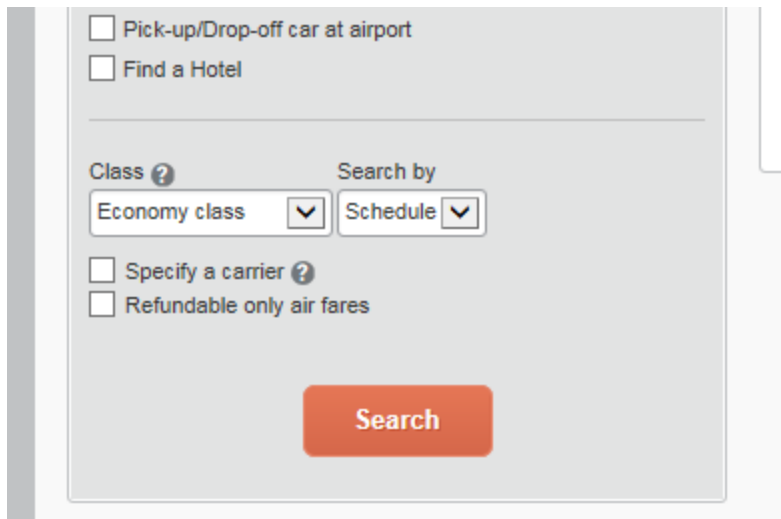   - The first (yellow) will be their frequent flyer carriers.

- The second (gray/khaki) are the most requested airlines.
- The remaining airlines are in alphabetical order.

8.   You cannot book a companion at the same time you make your own reservation via Concur. You can book a companion using the "Book for a guest" tab after you make your reservation or go to the carrier's website and make the companion travel reservation there. You can book both reservations together by calling and speaking to a Fox agent. Note the agency service fee is higher when calling and speaking to an agent.

TRIP SEARCH

Booking for myself | Book for a guest
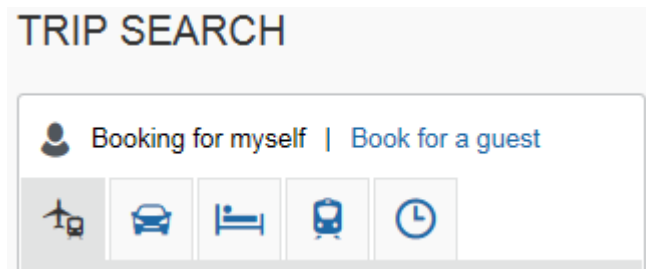
9.   For **Search flights by**, select either **Price** or **Schedule**. If you search by Schedule, you will see one-way options. If you search by Price, you will see round-trip options. Most find it easier and faster to search by **Schedule**.

Pick-up/Drop-off car at airport
Find a Hotel

Class ❓
Economy class ▾

Search by
Schedule ▾

Specify a carrier ❓
Refundable only air fares

Search

Note you can also click for car and hotel reservations here. You will also be given options to add hotel and car later in the process.

10. Click **Search**. The flight search results appear.

Step 2: Select a flight

On the Flight Search results page:

If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially

active.

If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active.

(Click either **Shop by Fares** or **Shop by Schedule** - whichever applies - for the appropriate help information).

1. Click **Select** for the appropriate flight options.

2. Click the **Show all details** dropdown arrow, as needed.

Selected Fare

| American Airlines | 06:05a SEA → 04:07p ATL | 1 stop DFW | 7h 02m | 🛜 \| Remove ✖ |
| | 12:24p ATL → 05:42p SEA | 1 stop CLT | 8h 18m | **$1,026.10** |

Hide all details ᐱ

DEPART ✈ Mon, Sep 25 – Seattle, WA to Atlanta, GA / 51m layover in Dallas, TX   Hide details ᐱ

Mon, Sep 25	06:05a SEA → 12:04p DFW	3h 59m	American Airlines 1332 🛜 **View seats** Boeing 737-800
	Layover in Dallas, TX	51m	Dallas Ft Worth Intl
	12:55p DFW → 04:07p ATL	2h 12m	American Airlines 1675 **View seats** Airbus Industrie A320-100/200

RETURN ✈ Fri, Sep 29 – Atlanta, GA to Seattle, WA / 1h 20m layover in Charlotte, NC   Hide details ᐱ

Fri, Sep 29	12:24p ATL → 01:44p CLT	1h 20m	American Airlines 2472 🛜 **View seats** Boeing 737-800
	Layover in Charlotte, NC	1h 20m	Charlotte Douglas Intl Arpt
	03:04p CLT → 05:42p SEA	5h 38m	American Airlines 443 **View seats** Airbus Industrie A321

| **Fare Details** | Free Checked Bags | Refundable | | |
| Main Cabin Flexible (M) Rules / Fare Details | **Visit American Airlines** | Yes Fees may apply | ✅ | **$1,026.10** |

Worldspan

1. Review the flight details for your trip.

2. **NOTE:** Depending on your airfare provider, you can click the **View seats** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**. **If you have status on a particular airline, do not select your seat here. Wait until further along in the process when the actual airline record locator is shown. Your status will not be recognized until that time.**

Seat Map (View Only)

American #1332, Boeing 737-800, Seattle Tacoma Intl Arpt (SEA) - Dallas Ft Worth Intl (DFW)
Seat assignment is subject to change up until time of departure

3. Click the fare amount button to select these flights.

4. On the **Review and Reserve Flight** page you can:

    - Review the flight details

    - Enter traveler information

    - Select frequent flyer programs

    - Select your seat assignment

    - Review the price summary

    - Select your method of payment

5. Click **Reserve Flight and Continue**.

Step 3: Select a rental car

If you requested a car on the **Flight** tab (or **Air / Rail**) **Search**, the rental car search results appear. For information about booking a rental car, see **Booking a Car** in this document. **If**

you are choosing a car class other than a mid-size car, you will be asked to give a reason why. CODA also requires that all car rentals be pre-approved.

Step 4: Select a hotel

If you requested a hotel on the **Flight** tab (or **Air / Rail**) **Search**, the hotel search results appear. CODA also requires that all hotel reservations be pre-approved. Please add the applicable comment – such as 'Preferred CODA hotel.'

Step 5: Review the Travel Details page (itinerary)

Review and change your itinerary, if necessary.

1. In the **Trip Overview** section:

    a. Review the information for accuracy.

    b. In the **I want to** section, print or email as appropriate.

    c. In the **Add to your Itinerary** section, add a car, hotel, Wi-Fi, etc., as needed.
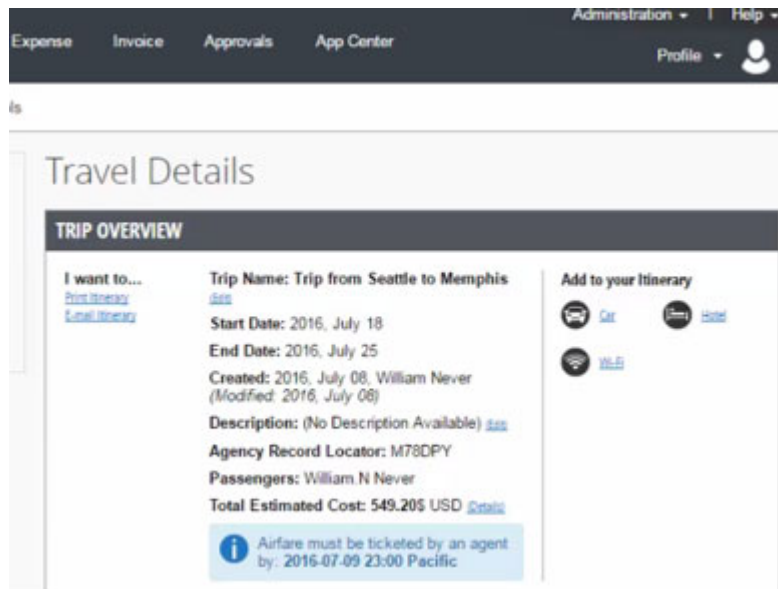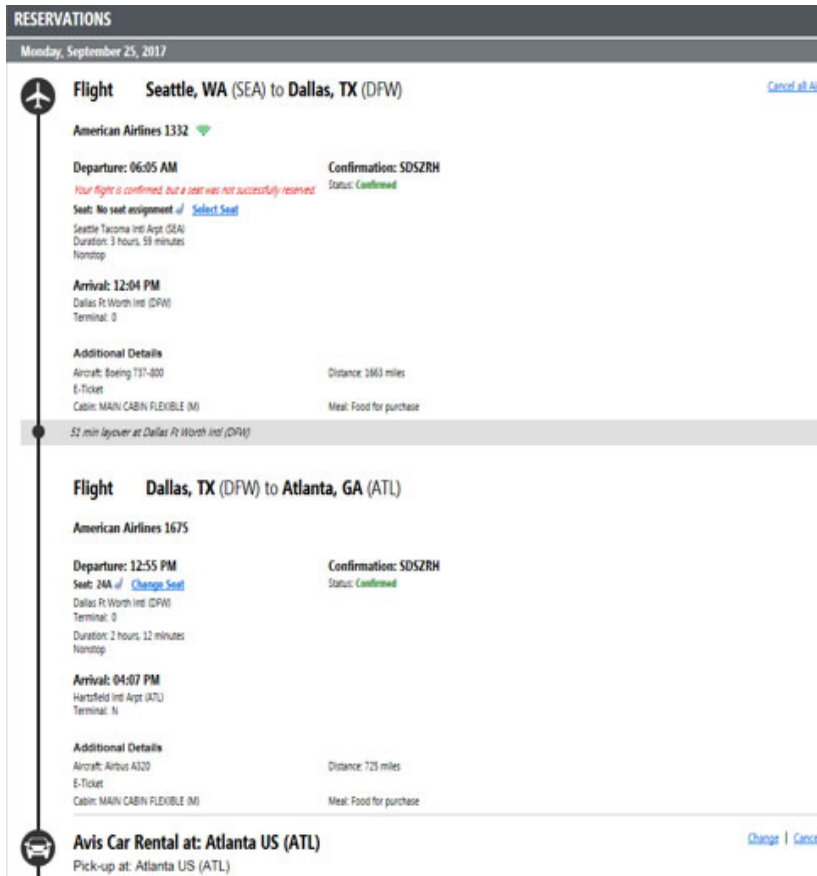

a. Verify the information for accuracy.

Click **Select Seat** or **Change Seat** to selector change your seat option (depending on the airline). **This is where those with frequent flyer status should choose their preferred seating. As you can see from the screen shot below the confirmation # is present and the carrier will now recognize your preferred status.**

b. If you need to change a travel reservation previously booked in Concur, please call Fox World Travel. **You cannot change a reservation in Concur.**

2. If you need to cancel a travel reservation, you should via Concur. Click **Cancel all Air**, as needed. In the **Flight** section:

3. Review the remaining sections as necessary and make the appropriate changes.

4. Review the **Total Estimated Cost** section.

5. Click **Next**.

The **Trip Booking Information** page appears.

Step 6: Review the booking information

Use the **Trip Booking Information** page to enter additional information about your trip.

Note the 'Select the Meeting You Are Attending' box. Look at the drop-down menu and please choose the correct meeting that you are authorized to attend. Your meeting organizer will have sent you this information.

If you do not see your meeting listed, click on MEETING NAME NOT IN LIST and in the box to the right add your meeting name and the ADA or CODA staff contact name so that we can have your travel authorized and charged to the correct budget.

Trip Booking Information

Trip Name
This will appear in your upcoming trip list.
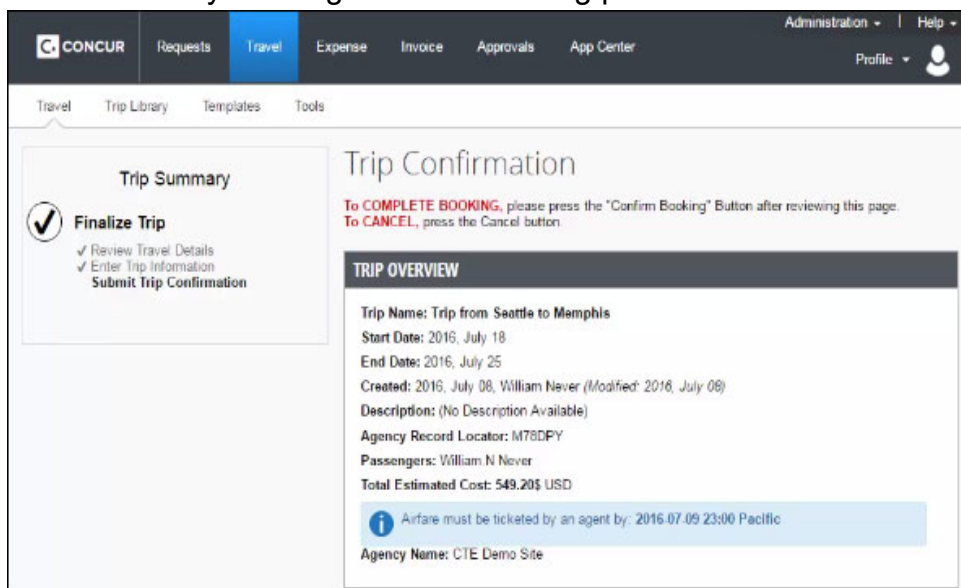
Trip from Chicago to Atlanta

Trip Description (optional)
Used to identify the trip purpose

Comments for the Travel Agent (optional)
Special Requests may incur a higher service fee.

Select the meeting you are attending. [Required]

Monitor and automatically change my seats prior to departure based on my Concur profile preferences. [Required]

1. Enter or modify your **Trip Name**. This is how the trip will appear in your Concur Trip Library and in the automated email from Concur.

2. If you did not receive the seats that you prefer, in the monitor and automatically change my seats box, choose either option. Fox has 24/7 seat monitoring software.

3. **If you book the trip, you will automatically receive the email.**

4. **If you book as an arranger, you will also receive the email.**

5. Choose your preferred email format, either plain text or HTML.

6. Click **Next**. Concur displays your itinerary on the **Trip Confirmation** page. This itinerary will include any messages about ticketing policies.
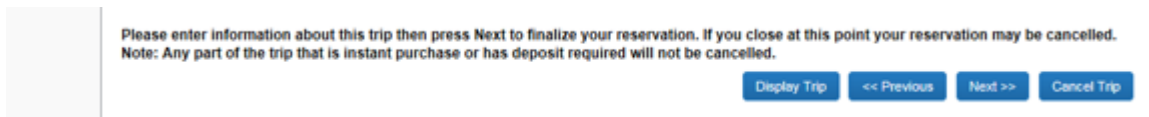
Administration ▾ | Help ▾

C. CONCUR   Requests   Travel   Expense   Invoice   Approvals   App Center

Profile ▾

Travel   Trip Library   Templates   Tools

Trip Summary

✓ **Finalize Trip**
✓ Review Travel Details
✓ Enter Trip Information
   Submit Trip Confirmation

Trip Confirmation

To COMPLETE BOOKING, please press the "Confirm Booking" Button after reviewing this page.
To CANCEL, press the Cancel button.

TRIP OVERVIEW

Trip Name: Trip from Seattle to Memphis
Start Date: 2016, July 18
End Date: 2016, July 25
Created: 2016, July 08, William Never (Modified: 2016, July 08)
Description: (No Description Available)
Agency Record Locator: M78DPY
Passengers: William N Never
Total Estimated Cost: 549.20$ USD

ⓘ Airfare must be ticketed by an agent by: 2016.07.09 23:00 Pacific

Agency Name: CTE Demo Site

Step 7: Purchase the ticket

1. Click on NEXT. Make sure you follow the reservation process all the way to the end by reading each screen and clicking on **NEXT** (lower right). If you don't, you will not have completed the reservation process.

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip | << Previous | Next >> | Cancel Trip

2. Click **Finish**. The **Finished!** screen shows your confirmation number and information to contact Fox World Travel.

Finished!

You have successfully booked your trip!

Trip Record Locator : KFWD3G

This trip complies with your travel policy.
Your itinerary has been saved. Fox World Travel - 10MN - 08 - American Dental Association will service your itinerary.
Please Note: Fares are not guaranteed until tickets are issued and are subject to change without notice.
Airfare must be ticketed by: 01/06/2017 11:00 pm Central

Travel Contact Information
844-319-2892
Email: online@gofox.com

You will receive your travel confirmation via e-mail from Fox World Travel. You should receive the confirmation shortly after making your reservation. If you don't, contact Fox World Travel at 844-319-2892.

IMPORTANT: The first time you travel with Fox you will also receive a sign up for trip alerts e-mail. You need to either register for this free service or opt out to stop receiving registration e-mails. The ADA strongly suggests that you register to use this service so that you can be advised of flight delays and cancellations. You only need to register once to be covered for all your ADA-funded trips.

You should also go to www.ada.org/travel and click on the Fox World Travel Program link. This page has many other resources to make your travel and expense reporting for the ADA as easy and successful as possible.

Updated: October 24, 2023