

## **AGENCY PROFILE PROCEDURES and ONLINE TRAVEL RESERVATION (Concur) FAQ's**

When planning your travel with the state, please use the travel services of Child Travel New York, Inc., d/b/a Direct Travel (DT). They provide online bookings through their Online Travel Reservation System (Concur) and their experienced travel counselors help the state save money.

As you plan your business trip there are a few things to keep in mind:

Your agency finance office must request DT's profile form and provide basic information for all travelers that may be required to travel. This form includes a list of all travelers for your agency along with their email address, and legal first and last name.

Each agency is required to identify at least two (2) key contacts in the event DT requires assistance. Updates to key contact designation can be sent to DT's Account Manager, Mike Moretti at [mmoretti@dt.com](mailto:mmoretti@dt.com). Please provide the following information when updating key contact information: Name, Phone, Email Address.

Key contact(s) must notify DT at [nys@dt.com](mailto:nys@dt.com) when an employee leaves or joins the agency.

**Please email [nys@dt.com](mailto:nys@dt.com) and request the required agency profile form. The completed form must be submitted via email to [nys@dt.com](mailto:nys@dt.com). Shortly thereafter, Direct Travel will send your agency travelers a welcome email to their agency email address that will provide detailed registration and training instructions to access the Online Travel Reservation System (Concur).**

### **Concur Solutions – Online Travel Reservation System**

#### **What should I do the first time I log into Concur Travel?**

Upon receipt of your welcome email letter, the first time you log into Concur Travel, you should select a password and complete your profile. Before you use Concur Travel to reserve travel, click the "Profile" link and then "Profile Settings" to review and update your profile. You must save your profile and complete all required fields before you first attempt to book a trip in Concur Travel. If you would like to assign a travel arranger, you may add that person at the bottom of your profile. More information is outlined below.

Training videos are available on the Concur home page under Company notes. Click on the "read more" tab and move all the way to the bottom. There is also a free monthly training session for which you may enroll. To register for this class, click on the link at the bottom of the page.

#### **What are the required fields on the profile page?**

The fields required on the profile page are: your full name matching your picture identification, contact telephone numbers, email address, and TSA information. Optional fields include travel preferences such as frequent flier information and seating preferences.

#### **What if I do not book my own travel?**

In Concur, you can select an assistant or arranger to reserve your travel. On the "Profile" tab, click "Profile Settings" and go to the "Assistants and Travel Arrangers" section. Click "Add an Assistant" to add the person who you would like to authorize to reserve your travel. This person can now update your profile and make travel arrangements for you. If you do not see your travel arranger in the list of people

to select from, that individual might not have access to Concur Travel. To add your arranger to the list, send a request to [nys@dt.com](mailto:nys@dt.com).

**How many primary assistants can I have?**

You may only have one primary assistant but may assign multiple people to the feature: “Can book travel for me.”

**Can one travel arranger set-up travel for all travelers?**

Yes.

**Is my information entered in the travel profile shared with anyone?**

Only you as the traveler and the travel arranger have access to the profile information. The travel arranger does not have access to your personal credit card information.

**Can I book travel for guests and other non-state employees?**

Please contact Direct Travel at (800) 774-0655 or your finance office to set-up a profile. Once the profile is set-up with Direct Travel and you are given the guest booking privileges, go to the left-hand side of the home page and select “Book for a guest.”

**Who should I contact for technical assistance with Concur?**

Hours of operation and contact information is located on the Main Concur landing page. You may contact online support between 8:00am and 8:00pm M-F at 1-800-999-7939 or via email at [online@dt.com](mailto:online@dt.com).

Keep in mind: **Airline and rail transaction fees through the Online Travel Reservation System (Concur) is only \$4.95. This is significantly less than the agent-assisted airline transaction fee of \$14.95 and is less than fees charged on most airline travel sites.** A complete list of transaction fees is available at: [www.ogs.ny.gov/purchase/snt/awardnotes/7900522536PL\\_TMS.pdf](http://www.ogs.ny.gov/purchase/snt/awardnotes/7900522536PL_TMS.pdf)

**Approvals**

Please be reminded travelers are required to follow their travel guidelines and obtain the necessary travel approvals prior to purchasing travel. Please contact your Agency Finance office for questions related to your travel authorization policy.

For information and reservation assistance please contact Direct Travel at:

Reservations: 800-774-0655, Email: [nys@dt.com](mailto:nys@dt.com) After Hours Emergency Assistance: 800-774-0655

Online Travel Reservations with Concur: [www.concursolutions.com](http://www.concursolutions.com)