



# Concur Travel

## Southwest Direct Connect

**User Guide**

**March 2012**

Concur Travel is the online booking tool approved by the DGS Statewide Travel Program.

## Traveler Profile

You must have a user profile established in concur to make reservations. To create a profile, contact your department travel coordinator.

## Logging into Concur

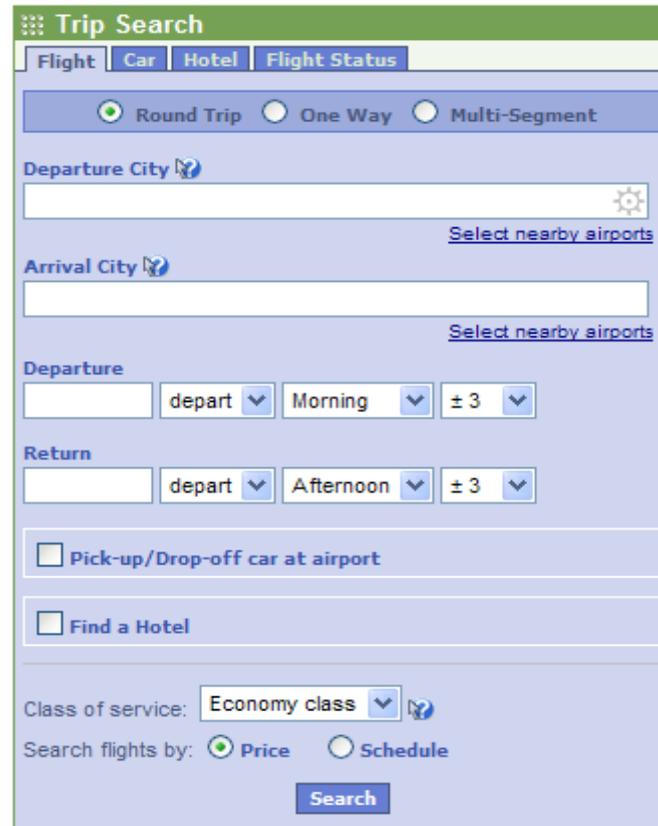
Go to [www.caltravelstore.com](http://www.caltravelstore.com)  
Click on the Concur log-in link

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How to book  
Southwest direct  
connect flights

Once the direct connect feature for Southwest has been enabled, fill in the desired cities, dates and times, and search for flights:



The image shows a screenshot of the Southwest Airlines Trip Search interface. At the top, there is a green header with the text "Trip Search" and a menu bar with tabs for "Flight", "Car", "Hotel", and "Flight Status". Below the menu, there are radio buttons for "Round Trip" (selected), "One Way", and "Multi-Segment". The form includes input fields for "Departure City" and "Arrival City", each with a "Select nearby airports" link. There are also dropdown menus for "Departure" (with "depart" and "Morning" options) and "Return" (with "depart" and "Afternoon" options), both with a "± 3" dropdown. Below these are checkboxes for "Pick-up/Drop-off car at airport" and "Find a Hotel". At the bottom, there is a "Class of service" dropdown set to "Economy class" and a "Search flights by" section with radio buttons for "Price" (selected) and "Schedule". A "Search" button is located at the very bottom.

Southwest flights will be displayed on the Flight Results page.

# Search by Price:

Concur: Air Availability/Fare Quote -- Kelly Christine May TravelStore - State of California - Windows Internet Explorer

https://app2.outtask.com/travelwizard/twAirChoose.asp?59053%2E62=2997715473%2E17505&cbid=59054%2E38&HTTP\_REFERER=%2Ftravelwiza...

Home Arrangers Trip Library Templates Policy Profile Tools

ALL State of California Fares are refundable, no change fee or penalties apply

Los Angeles, CA To Sacramento, CA Wed, Apr 4 - Thu, Apr 5

Baggage Fee Policies

	United	Southwest	Alaska Airlines	Amtrak	American	Delta	Multiple Carriers	US Airways
All 96 results	211.60	385.60	405.60	..	211.60	385.60	385.60	385.60
Nonstop 62 results	211.60	385.60	405.60	..	211.60	385.60	385.60	385.60
1 stop 20 results	222.40	..	532.40	131.00	..	..	396.40	..
2 stops 14 results	..	..	..	116.00	..	..	..	..

Show fare display legend

Shop by Fares | Shop by Schedule | Sorted By: Policy - Most Compliant

Expand All Details

Displaying: 96 out of 96 results.

Price	Carrier	Depart	Arrive	Stops	Duration
\$211.60	United	LAX Wed 7:48 am	SMF Wed 9:22 am	0	1h 34m
Reserve ✓		SMF Thu 9:51 am	LAX Thu 11:23 am	0	1h 32m
compare ↕	◆◆	R	more like this +	show details ⚙	
\$222.40	United	LAX Wed 8:16 am	SMF Wed 11:55 am	1	3h 39m
Reserve ✓		SMF Thu 9:51 am	LAX Thu 11:23 am	0	1h 32m
compare ↕	◆◆	R	more like this +	show details ⚙	
\$222.40	United	LAX Wed 8:16 am	SMF Wed 2:06 pm	1	5h 50m
Reserve ✓		SMF Thu 9:51 am	LAX Thu 11:23 am	0	1h 32m
compare ↕	◆◆	R	more like this +	show details ⚙	
\$222.40	United	LAX Wed 9:50 am	SMF Wed 2:06 pm	1	4h 16m
Reserve ✓		SMF Thu 9:51 am	LAX Thu 11:23 am	0	1h 32m
compare ↕	◆◆	R	more like this +	show details ⚙	

Change Flight Search

From: LAX - Los Angeles Intl - Los Angeles, CA

To: SMF - Sacramento International - Sacramento, CA

Departure: 04/04/2012 dep 9:00am ± 6

Return: 04/05/2012 dep 3:00pm ± 6

Refundable only air fares

Class of service: Economy class

Search flights by: Price Schedule

Outbound - Wed, Apr 4

Depart: 6:00 AM - 2:55 PM

Arrive: 7:40 AM - 11:59 PM

Return - Thu, Apr 5

Depart: 9:51 AM - 7:40 PM

Arrive: 11:23 AM - 9:25 AM

Price: \$116.00 - \$532.40

The Southwest direct connect will display all Southwest content pulled from the direct connect and will show the different fare classes available.

If the “refundable only air fares” box is checked, only the Anytime and Business Select fares (refundable fares) will show.

The screenshot shows a travel website interface with the following elements:

- Baggage Fee Policies Table:**

	United	Southwest	Alaska Airlines	Amtrak	American	Delta	Multiple Carriers	US Airways	
All	97 results	211.60 2 results	385.60 20 results	405.60 18 results	..	211.60 8 results	385.60 6 results	385.60 7 results	385.60 2 results
Nonstop	63 results	222.40 17 results	..	532.40 1 results	131.00 1 results	..	..	396.40 1 results	..
1 stop	20 results	..	..	..	116.00 14 results	..	..	..	..
2 stops	14 results	..	..	..	..	..	..	..	..

- Search Parameters:** From: LAX - Los Angeles Intl - Los Angeles, CA; To: SMF - Sacramento International - Sacramento, CA; Departure: 04/04/2012 9:00am; Return: 04/05/2012 3:00pm.
- Search Options:**  Refundable only air fares; Search flights by: Price (selected).
- Flight Results Table:**

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$385.60	Southwest	LAX Wed 2:55 pm	SMF Wed 4:15 pm	0	1h 20m
Fares <input checked="" type="checkbox"/>	Southwest	SMF Thu 1:40 pm	LAX Thu 3:00 pm	0	1h 20m

- Outbound flight details (Southwest #1060):** Los Angeles Intl (LAX) Depart: Wednesday, 2:55pm; Sacramento Internation... (SMF) Arrive: Wednesday, 4:15pm; Stops: 0 Duration: 1h 20m Anytime: Y 235 lbs CO2.
- Return flight details (Southwest #1213):** Sacramento Internation... (SMF) Depart: Thursday, 1:40pm; Los Angeles Intl (LAX) Arrive: Thursday, 3:00pm; Stops: 0 Duration: 1h 20m Anytime: Y 235 lbs CO2.
- Fare Options:** Anytime \$192.80, Business Select \$208.80.
- Additional Info:** Ticket is refundable; (Southwest) Fare Rules.

If the “refundable only air fares” box is unchecked, all Southwest fares will show, including the “Wanna Get Away”.

The screenshot shows a travel website interface with a search results table and a sidebar. A red arrow points to the 'Wanna Get Away' fare option in the 'Outbound flight' section. A red circle highlights the 'Refundable only air fares' checkbox in the sidebar, which is unchecked.

Carrier	Nonstop	1 stop	2 stops
All 94 results	211.60 52 results	222.40 28 results	--
United	279.60 17 results	459.40 1 results	--
Alaska Airlines	293.60 20 results	--	--
Southwest	--	131.00 1 results	116.00 14 results
Amtrak	--	--	--
American	160.60 6 results	--	--
Multiple Carriers	293.60 4 results	277.40 6 results	--
US Airways	293.60 1 results	277.40 2 results	--
Delta	293.60 3 results	--	--

Shop by Fares | Shop by Schedule | Sorted by: Policy - Most Compliant

Expand All Details | Displaying: 20 out of 94 results.

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$293.60	Southwest	LAX Wed 2:55 pm	SMF Wed 4:15 pm	0	1h 20m
Fares ✓	Southwest	SMF Thu 1:40 pm	LAX Thu 3:00 pm	0	1h 20m

Outbound flight: Los Angeles, CA (LAX) - Sacramento, CA (SMF) Apr 4

Carrier	Depart	Arrive
Southwest #1060	Los Angeles Intl (LAX) Depart: Wednesday, 2:55pm	Sacramento Internation... (SMF) Arrive: Wednesday, 4:15pm

Wanna Get Away | Anytime | Business Select

\$146.80 | \$192.80 | \$208.80

Return flight: Sacramento, CA (SMF) - Los Angeles, CA (LAX) Apr 5

Carrier	Depart	Arrive
Southwest #1213	Sacramento Internation... (SMF) Depart: Thursday, 1:40pm	Los Angeles Intl (LAX) Arrive: Thursday, 3:00pm

Wanna Get Away | Anytime | Business Select

\$146.80 | \$192.80 | \$208.80

Ticket is refundable; (Southwest) Fare Rules

Previous Searches

Change Flight Search

From: LAX - Los Angeles Intl - Los Angeles, CA

To: SMF - Sacramento International - Sacramento, CA

Departure: 04/04/2012 dep 9:00am

Return: 04/05/2012 dep 3:00pm

Refundable only air fares

Search flights by: Price | Schedule

Outbound - Wed, Apr 4

Depart: 6:00 AM - 2:55 PM

Arrive: 7:40 AM - 11:59 PM

Return - Thu, Apr 5

Depart: 9:51 AM - 7:40 PM

Arrive: 11:23 AM - 9:25 AM

Price: \$116.00 - \$459.40

All State of California Concur sites will “gray out” the Business Select fares so they are not available for purchase.

The screenshot shows a flight search results page on the Concur website. The search parameters are: From: LAX - Los Angeles Intl - Los Angeles, CA; To: SMF - Sacramento International - Sacramento, CA; Departure: 04/04/2012 at 9:00am; Return: 04/05/2012 at 3:00pm. The results are sorted by Policy - Most Compliant. The main flight option is a Southwest round trip (flights #1060 and #1213) with a Business Select fare of \$208.80. A red arrow points to the Business Select fare, and a red circle highlights the 'Reserve' button, which is grayed out. A message states: 'Ticket is refundable; (Southwest) Business Select is not allowed by Public Health. Fare Rules'. The page also shows a 'Frequent Flyer Programs' section with 'No Program selected' and a 'Reserve' button.

Nonstop	1 stop	2 stops
52 results	28 results	14 results

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$293.60	Southwest	LAX Wed 2:55 pm	SMF Wed 4:15 pm	0	1h 20m
		SMF Thu 1:40 pm	LAX Thu 3:00 pm	0	1h 20m

**Outbound flight:** Los Angeles, CA (LAX) - Sacramento, CA (SMF) Apr 4

Southwest #1060  
Los Angeles Intl (LAX) Depart: Wednesday, 2:55pm  
Sacramento Internation... (SMF) Arrive: Wednesday, 4:15pm  
Stops: 0 Duration: 1h 20m Business Select: K 235 lbs CO<sub>2</sub>

Wanna Get Away Anytime Business Select  
\$146.80 \$192.80 \$208.80

**Return flight:** Sacramento, CA (SMF) - Los Angeles, CA (LAX) Apr 5

Southwest #1213  
Sacramento Internation... (SMF) Depart: Thursday, 1:40pm  
Los Angeles Intl (LAX) Arrive: Thursday, 3:00pm  
Stops: 0 Duration: 1h 20m Business Select: K 235 lbs CO<sub>2</sub>

Wanna Get Away Anytime Business Select  
\$146.80 \$192.80 \$208.80

**Business Select is not allowed by Public Health.**

Frequent Flyer Programs: No Program selected

Your company credit card will be used to purchase this trip.

Select the BTA to use for the booking on the Trip Payment Information screen and select Next, or choose add a ticket credit to apply from previously cancelled reservations with Southwest Airlines.

The screenshot shows a web browser window displaying the Concur Travel Wizard interface. The browser's address bar shows the URL: [https://app2.outtask.com/travelwizard/twTripCredit.asp?cbsid=46777%2E15&HTTP\\_REFERER=%2Ftravelwizard%2Fwizard%5Fprocessing%2Ea](https://app2.outtask.com/travelwizard/twTripCredit.asp?cbsid=46777%2E15&HTTP_REFERER=%2Ftravelwizard%2Fwizard%5Fprocessing%2Ea). The browser's title bar reads "Concur: Travel Wizard -- Kelly Christine May TravelStore - State of California - Windows Internet Explorer".

The main page header includes the Concur logo and the text "Welcome, Kelly May". Below the header, there are navigation tabs for "Travel", "Reporting", "Administration", and "Profile". The "Travel" tab is selected, and the sub-navigation includes "Home", "Arrangers", "Trip Library", "Templates", "Policy", "Profile", and "Tools".

The main content area is titled "Trip Payment Information". It includes a profile picture and the text "Booking for: Kelly Christine May". Below this, there is a section titled "Choose a ticket credit" with the text: "These are ticket credits from previously canceled tickets at Southwest Airlines. You can use these as form of payment for your Southwest Direct Connect booking." A link "Add Ticket Credit" is highlighted with a red arrow. Below this, there is a section titled "Choose a credit card" with a link "Add a New Credit Card" and a dropdown menu showing "Fake VISA (...1000)".

A modal window titled "Add Ticket Credit" is open, displaying the following fields: "Southwest Record Locator: (Required)", "Cancel Date:", and "Ticket Amount: US-Dollar (\$)". There are "Add Ticket Credit" and "Cancel" buttons at the bottom of the modal.

At the bottom of the main page, there is a message: "Please choose a credit card and billing information, if applicable." with buttons for "Start Over", "<< Previous", and "Next >>".

If you have a ticket credit from a previous trip stored in your Concur profile, the ticket credit will show in the Trip Payment Information screen.

Concur: Travel Wizard -- M. x Amazon.com: water pik

https://www.concursolutions.com/travelwizard/twTripCredit.asp?cbsid=40671%2E45&HTTP\_REFERER=%2Ftravelwizard%2Fwizard\_processing%2Easp

Welcome, Melody Francis Help | Log Out

**Concur** CA.GOV

Travel Reporting Administration Profile

Home Arrangers Trip Library Templates Meetings Meeting Admin Policy Profile Tools Concur.XA

### Trip Payment Information

Booking for:  
Melody  
Ann  
Francis

**Choose a ticket credit**  
These are ticket credits from previously canceled tickets at Southwest Airlines. You can use these as form of payment for your Southwest Direct Connect booking.

[Add Ticket Credit](#)

- ISNSAO Remaining: \$ 44.80 (\*) Valid Until: 02/28/2013

(\*) This is an estimated amount.

**Choose a credit card** [Add a New Credit Card](#)  
Company cards are indicated by an asterisk (\*).

Melody's Mastercard (...8941)

Please choose a credit card and billing information, if applicable.

All ticket credits will be stored in your Concur profile. When cancelled, all refundable tickets are automatically refunded to the BTA and all non-refundable tickets will automatically be stored in your Concur profile.

### Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

		<a href="#">Southwest</a>	<a href="#">Rapid Rewards</a>
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### Southwest Ticket Credits

+ Add Ticket Credit

<b>D5AZ4K</b> 	<b>DTNZ44</b> 	<b>DBNZ44</b> 	<b>D8NZ4G</b> 	<b>DTAZ4Q</b> 
✕ Remaining: \$89.70 (*) Valid Until: 10/07/2011	✕ Remaining: \$89.70 (*) Valid Until: 10/07/2011	✕ Remaining: \$59.70 (*) Valid Until: 10/07/2011	✕ Remaining: \$59.70 (*) Valid Until: 10/07/2011	✕ Remaining: \$89.70 (*) Valid Until: 10/07/2011

(\*) This is an estimated amount.

Favorite Hotels 

Once the form of payment has been submitted, review the itinerary on the Travel Details screen or add additional car/hotel and click next.

The screenshot shows a web browser window with the URL [https://app2.outtask.com/travelwizard/twShowTrip.asp?49108%2E91=2936741352%2E0813&cbsid=49109%2E9&HTTP\\_REFERER=%2Ftravelwiz](https://app2.outtask.com/travelwizard/twShowTrip.asp?49108%2E91=2936741352%2E0813&cbsid=49109%2E9&HTTP_REFERER=%2Ftravelwiz). The page title is "Concur: Travel Wizard -- Kelly Christine May TravelStore - State of California - Windows Internet Explorer".

The main content area is titled "Travel Details" and shows a booking for Kelly Christine May for the dates "Apr 4 - Apr 5". The trip is titled "Trip from Los Angeles to Sacramento".

**Trip from Los Angeles to Sacramento**  
Description: (No Description Available)  
Trip Record Locator: DGSQJ Created on: 3/16/2012 1:38:28 PM  
Passengers: Kelly Christine May.  
Airfare must be ticketed by an agent by: 03/17/2012 5:30 PM Pacific

**Wednesday Apr 4, 2012**

**Air**  
Los Angeles, CA (LAX) to Sacramento, CA (SMF)

**Apr 4** Southwest 1060 Duration: 1 hour, 20 minutes Nonstop  
Los Angeles (LAX): 2:55 PM Sacramento (SMF): 4:15 PM  
Confirmation Number: DQWQH9 Status: Booked in Southwest direct /DQWQH9  
Flight Information  
Distance: 373 miles  
Emissions: 235.7 lbs CO<sub>2</sub> E-Ticket  
Cabin: Anytime (Y) Seat: No seat assignment  
Add: Parking Car Hotel

**Thursday Apr 5, 2012**

**Air**  
Sacramento, CA (SMF) to Los Angeles, CA (LAX)

**Apr 5** Southwest 1213 Duration: 1 hour, 20 minutes Nonstop  
Sacramento (SMF): 1:40 PM Los Angeles (LAX): 3:00 PM  
Confirmation Number: DQWQH9 Status: Booked in Southwest direct /DQWQH9  
Flight Information  
Distance: 373 miles  
Emissions: 235.7 lbs CO<sub>2</sub> E-Ticket  
Cabin: Anytime (Y) Seat: No seat assignment  
Add: Parking Car Hotel

The browser's taskbar shows several open tabs: "http://www.travelsitenow...", "Concur: Travel Wizard ...", "American Express", "California Government Bu...", "Google", "iBank Version 4", "Southwest Airlines - SWA...", and "STAMMP Home". The system tray at the bottom shows the date and time as 13:00 on 3/16/2012, and the network status as "Internet | Protected Mode: Off".

Review the Trip Booking Information screen. Select Next to complete booking.

Concur: Travel Wizard -- Kelly Christine May TravelStore - State of California - Windows Internet Explorer

https://app2.outtask.com/travelwizard/twTripDetails.asp?49112%2E84=4660643935%2E20355

File Edit View Favorites Tools Help

Convert Select

American Express California Government Bu... Google iBank Version 4 Southwest Airlines - SWA... STAMMP Home

http://www.travelsitenow... Concur: Travel Wizard -... x

Welcome, Kelly May Help Log Out

**Concur** CA.GOV

### Trip Booking Information

The trip name and description are for your record keeping convenience.

**Trip Name**  
This will appear in your calendar

**Trip Description** (optional)  
Used to identify the trip purpose

Trip from Los Angeles to Sacramento Audit for Office of Public Health

Send a copy of the confirmation to:

Send my email confirmation as  
 HTML  Plain-text

Index PCA

You may HOLD this reservation until: 03/17/2012 5:30 PM Pacific

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 Hold Trip << Previous Next >> Cancel

Done Internet | Protected Mode: Off 100%

On the following screen, to complete booking, select Purchase Ticket.

# Cancel A Trip:

The screenshot shows the Concur website interface in a Windows Internet Explorer browser. The page title is "Travel Center - Windows Internet Explorer" and the URL is "https://app2.outtask.com/travelhome.asp". The browser's address bar shows "http://www.travelsitenow..." and "Travel Center". The page header includes "Welcome, Kelly May" and "CA.GOV". The main navigation menu includes "Travel", "Reporting", "Administration", and "Profile". The "Travel" sub-menu is expanded, showing "Home", "Arrangers", "Trip Library", "Templates", "Policy", "Profile", and "Tools".

The "Travel Information" section contains a message about TripIt and a link to "Sign up here". The "Upcoming Trips" section is active, showing a table of trips. A red arrow points to the "Cancel Trip" option in a dropdown menu for the trip "Audit for Office".

Trip Name/Description	Locator	Status	Start Date	End Date
Trip from Los Angeles to San Francisco Audit for Office	DGSQJJ	On Hold By User Trip will be automatically cancelled at: 03/17/2012 5:30 PM Pacific	04/04/2012	04/05/2012

The dropdown menu for "Audit for Office" contains the following options:

- Finish/Complete Trip
- Cancel Trip
- Clone Trip
- Share Trip
- Cancel Entire Trip

On the Concur home page, click on the upcoming trip and select Cancel.

If you purchased a refundable fare, the fare amount will be automatically refunded to the BTA. If you purchased a non-refundable fare, the credit will automatically be stored in your Concur profile.

The screenshot shows the Concur Travel Wizard interface. At the top, the browser address bar displays the URL: [https://www.concursolutions.com/TravelWizard/twTripCancel.asp?52625%2E96=3186423182%2E48749&cbsid=52643%2E33&HTTP\\_REFERER=%2Ftravelwizard%2F](https://www.concursolutions.com/TravelWizard/twTripCancel.asp?52625%2E96=3186423182%2E48749&cbsid=52643%2E33&HTTP_REFERER=%2Ftravelwizard%2F). The page header includes the Concur logo and the text "Welcome, Melody Francis". A navigation menu contains links for Travel, Reporting, Administration, and Profile, with sub-links for Home, Arrangers, Trip Library, Templates, Meetings, Meeting Admin, Policy, Profile, Tools, and Concur XA.

The main content area features a large message: "Your trip has been successfully cancelled." To the right of this message is a profile icon and the text "Booking for: Melody Ann Francis". Below this is a red-bordered box titled "Southwest Flight Cancellation" with the Southwest logo and the text "Airline Record Locator: ISNSAO". The message inside the box states: "Your trip was unable to be refunded to your credit card. Credit for your trip has been saved and can be used to purchase another Southwest flight for up to one year in the future."

Below the cancellation message is a "Return to Travel Center" button. To the right, a sidebar contains several sections: "Car Rental Preferences" (with dropdowns for Car Type, Smoking Preference, and Car Transmission, and checkboxes for In-car GPS system and Ski rack), "Frequent-Traveler Programs" (with a "+ Add a Program" link and "No programs defined" text), "Southwest Ticket Credits" (with a "+ Add Ticket Credit" link and details for ISNSAO: Remaining: \$44.80, Valid Until: 02/28/2013), and "Favorite Hotels" (listing Radisson Hotel Salt Lake City Airport and Los Angeles Airport Marriott).

A red arrow points to the "Southwest Ticket Credits" section in the sidebar.

# How to add ticket credits to your profile

# Adding ticket credits to your profile

The screenshot shows a Windows Internet Explorer browser window displaying a user profile page. The address bar shows the URL: <https://app2.outtask.com/profile/personalprofile.asp?#TravelPreferences>. The page is titled "My Profile" and contains several sections for travel preferences:

- I prefer hotel that has:**  a gym  a pool  a restaurant  room service  Early Check-in
- Accessibility Needs:**  Wheelchair access  Blind accessible
- Car Rental Preferences:** State of California does not reimburse for Navigational systems (GPS).  
Car Type:  Smoking Preference:  Car Transmission:   In-car GPS system  Ski rack  
Message to Vendor:
- Frequent-Traveler Programs:** Your Frequent Traveler, Driver, and Hotel Guest Programs. [+ Add a Program](#)  
No programs defined
- Southwest Ticket Credits:** [Add Ticket Credit](#)
- Favorite Hotels:** Hotels where you prefer to stay when visiting a particular city.  

	<a href="#">Crowne Plaza Los Angeles Airport</a>	Los Angeles, California	<a href="#">X</a>
--	--	-------------------------	-------------------
- TSA Secure Flight:** The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

A red arrow points to the "Add Ticket Credit" link in the Southwest Ticket Credits section.

# Input Record Locator Number or Confirmation Number, Date, and Ticket Amount. Click Add Ticket Credit.

The screenshot shows a Windows Internet Explorer browser window displaying a 'My Profile' page. The address bar shows the URL: <https://app2.outtask.com/profile/personalprofile.asp?#otpopupdialog>. The page content includes sections for 'I prefer hotel that has:', 'Accessibility Needs', 'Car Rental Preferences', 'Frequent-Traveler Programs', 'Southwest Ticket Credits', 'Favorite Hotels', and 'TSA Secure Flight'. A modal dialog box titled 'Add Ticket Credit' is overlaid on the page. The dialog contains the following fields and options:

- Southwest Record Locator: (Required)
- Valid Until:
- Ticket Amount:  US-Dollar (\$)

At the bottom of the dialog are two buttons: 'Add Ticket Credit' and 'Cancel'. A green question mark icon is visible on the left side of the dialog.

The Southwest ticket credit is now stored in your profile and will populate when you are ready to reserve and purchase your next Southwest flight.

The screenshot shows a web browser window with the URL [https://www.concursolutions.com/travelwizard/twTripCredit.asp?cbsid=40671%2E45&HTTP\\_REFERERER=%2Ftravelwizard%2Fwizard\\_processing%2Easp](https://www.concursolutions.com/travelwizard/twTripCredit.asp?cbsid=40671%2E45&HTTP_REFERERER=%2Ftravelwizard%2Fwizard_processing%2Easp). The page is titled "Welcome, Melody Francis" and features the Concur logo and CA.GOV logo. The navigation menu includes "Travel", "Reporting", "Administration", and "Profile". The "Profile" sub-menu is active, showing "Home", "Arrangers", "Trip Library", "Templates", "Meetings", "Meeting Admin", "Policy", "Profile", "Tools", and "Concur XA".

The main content area is titled "Trip Payment Information" and includes a profile picture placeholder and the text "Booking for: Melody Ann Francis". Under the heading "Choose a ticket credit", there is a sub-heading "Choose a ticket credit" and a paragraph: "These are ticket credits from previously canceled tickets at Southwest Airlines. You can use these as form of payment for your Southwest Direct Connect booking." Below this is a link "Add Ticket Credit" and a form field containing "ISNSAO" with a Southwest logo, "Remaining: \$ 44.80 (\*)", and "Valid Until: 02/28/2013". A note below the field states "(\*) This is an estimated amount." Below this is a link "Choose a credit card" and "Add a New Credit Card". A dropdown menu shows "Melody's Mastercard (...8941)" and an "Edit This Card" button.

At the bottom of the page, a message box says "Please choose a credit card and billing information, if applicable." with buttons for "Start Over", "<< Previous", and "Next >>".

# QUESTIONS?

(Continued)

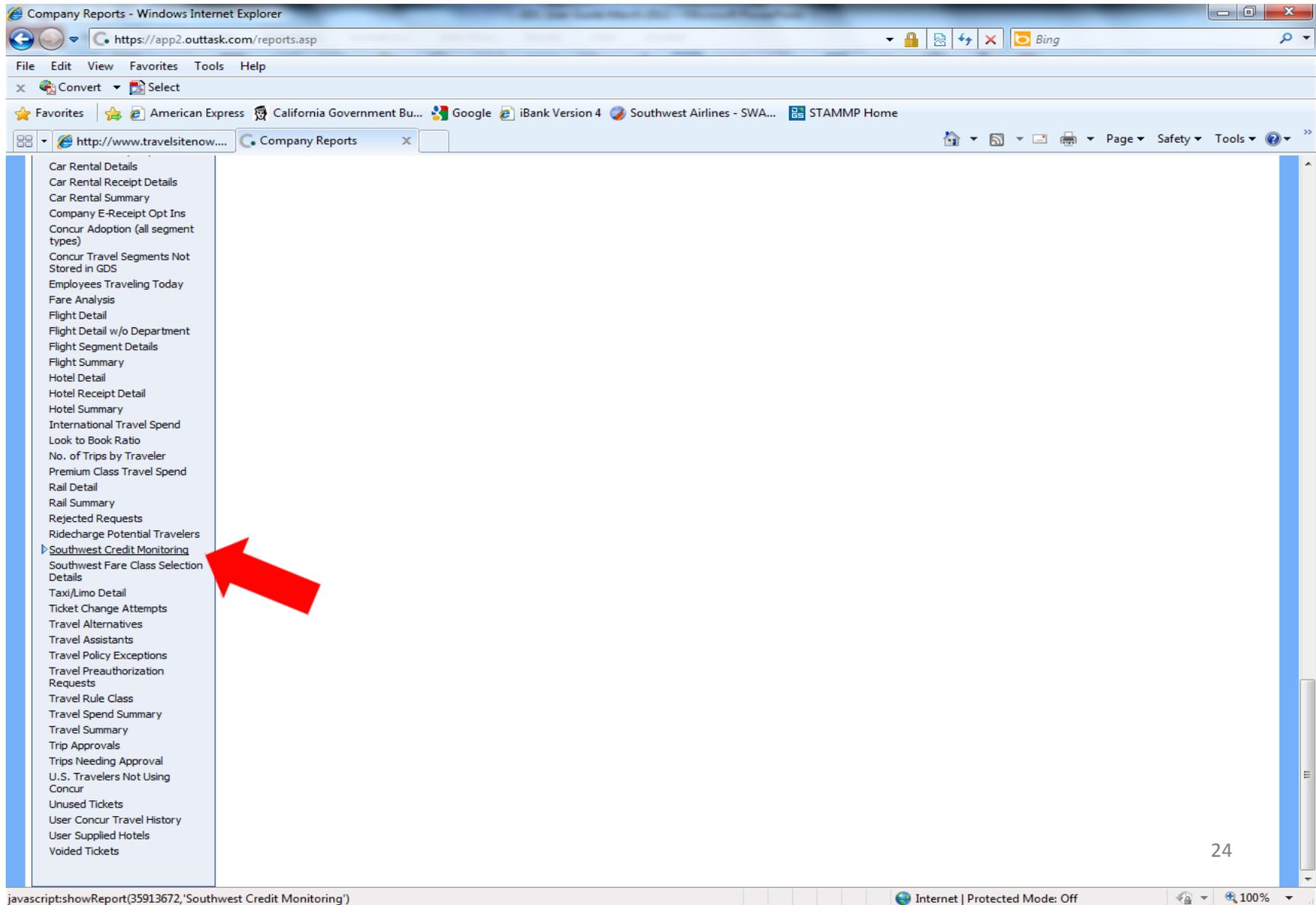
# Reporting for Travel Coordinators

# Ticket Tracking/Reporting Features for Travel Coordinators:

The screenshot displays the Concur web application interface within a Windows Internet Explorer browser. The browser's address bar shows the URL <https://app2.outtask.com/reports.asp>. The page header includes a welcome message for Kelly May and navigation links for Help and Log Out. The main navigation menu is divided into sections: Travel, Reporting, Administration, and Profile. Under the Reporting section, 'Travel Reports' is selected. A left-hand sidebar lists various report categories under 'Billing', including 'Accrued Agency Travel Details', 'Accrued Company Travel Details', and 'Agency All Company Travel Invoice Details'. The main content area features the 'Admin Password Changes' report, which includes a description: 'This report shows the employees in your company whose password was changed during the time period specified, where someone other than the employee him/herself changed the password. While most cases of password changes will be benign, this report can be a fraud prevention tool by looking for cases where administrators in your company have taken control of user accounts.' Below the description is a warning: 'PLEASE RUN THIS REPORT FOR NARROW DATE RANGES ONLY - Large date ranges will likely timeout. If this report is run on a monthly basis then there is no need to check prior to that time range.' A form for generating the report includes a 'Date Range' section with dropdown menus for 'By Month', 'March', and '2012', and a radio button for 'HTML (display to Screen)'. A 'Submit' button is located to the right of the form. The browser's status bar at the bottom indicates 'Internet | Protected Mode: Off' and a zoom level of 100%.

Select Reporting, Travel Reports.

# Scroll down to the Travel Reports and select Southwest Credit Monitoring



The screenshot shows a Windows Internet Explorer browser window displaying a list of travel reports. The browser's address bar shows the URL <https://app2.outtask.com/reports.asp>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The browser's toolbar includes a search icon, a lock icon, a refresh icon, a close icon, and a Bing search icon. The browser's favorites bar shows several bookmarks, including American Express, California Government Bu..., Google, iBank Version 4, Southwest Airlines - SWA..., and STAMMP Home. The browser's address bar shows the current page is <http://www.travelsitenow...> and the page title is "Company Reports".

The main content area displays a list of travel reports. A red arrow points to the item "Southwest Credit Monitoring" in the list. The list includes the following items:

- Car Rental Details
- Car Rental Receipt Details
- Car Rental Summary
- Company E-Receipt Opt Ins
- Concur Adoption (all segment types)
- Concur Travel Segments Not Stored in GDS
- Employees Traveling Today
- Fare Analysis
- Flight Detail
- Flight Detail w/o Department
- Flight Segment Details
- Flight Summary
- Hotel Detail
- Hotel Receipt Detail
- Hotel Summary
- International Travel Spend
- Look to Book Ratio
- No. of Trips by Traveler
- Premium Class Travel Spend
- Rail Detail
- Rail Summary
- Rejected Requests
- Ridecharge Potential Travelers
- ▶ Southwest Credit Monitoring
- Southwest Fare Class Selection Details
- Taxi/Limo Detail
- Ticket Change Attempts
- Travel Alternatives
- Travel Assistants
- Travel Policy Exceptions
- Travel Preauthorization Requests
- Travel Rule Class
- Travel Spend Summary
- Travel Summary
- Trip Approvals
- Trips Needing Approval
- U.S. Travelers Not Using Concur
- Unused Tickets
- User Concur Travel History
- User Supplied Hotels
- Voided Tickets

The browser's status bar at the bottom shows "Internet | Protected Mode: Off" and "100%". The page number "24" is visible in the bottom right corner.

The report is a missed opportunities report. If a traveler booked a trip and did not apply a ticket credit from their profile, it will list the non-refundable ticket credit here. The goal would be to have no ticket credits listed which means all unused tickets have been applied and used.

Company Reports | Amazon.com: water pik | <https://www.concursolutions.com/reports.asp>

Welcome, Melody Francis | Help | Log Out

**Concur** CA.GOV

Travel | Reporting | Administration | Profile

Travel Reports | 1 Southwest Credit Monitoring

**Reports**

**Billing**

- Accrued Agency Travel Details
- Accrued Company Travel Details
- Agency All Company Travel Invoice Details
- Agency Invoiceable Travel Details
- Agency Travel Invoice Details
- Archived Agency Travel Invoice Details
- Archived Company Travel Invoice Details
- Billable Agent-Booked Trip Summary
- Billable Meeting Registrations By Agency
- Billable Meeting Registrations By Company
- Company Travel Invoice Details
- Concur Billing Accrued Agency/Direct Travel Details
- Concur Billing Accrued Company Travel Details
- Concur Billing Agency All Company Invoice Details
- Concur Billing Agency/Direct Travel Invoice Details
- Concur Billing Agency/Direct Travel Invoice Details with Names
- Concur Billing Annual Minimum Attainment Report
- Concur Billing Company Invoice Details
- Concur Billing Invoiced Trip Summary
- Concur Billing Reseller Indirect Customer List
- Invoiced Agent-Booked Trip Detail
- Meeting Registration Invoice Details
- Meeting Registrations Not Invoiced
- Sabre Convenience Fee Detail
- TMC Customer Configurations
- Uninvoiced Travel Details
- Webfare Buy Summary

**Southwest Credit Monitoring** [Show this Report by default](#)

This report shows unused Southwest ticket credit details.

Export To  
HTML (display to Screen)

**Southwest trip canceled resulting in ticket credit**

Login	First Name	Last Name	EmailAddress	Credit Amount	Currency	Record Locator For Canceled Trip	Record Locator For Trip With Unused Ticket Credit
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	ISNSAO	IMMQZW

Only those bookings cancelled in Concur will show up on the report. Please remind travelers to cancel of all their trips in Concur so the ticket credits will store in their Concur profile.

In this instance, Melody booked 9 trips and did not apply her ticket credit on file (I5NSAO). As a travel coordinator, you would work with Melody to ensure she applies the ticket credit on her next trip.

Company Reports - Windows Internet Explorer  
 https://app2.outtask.com/reports.asp

Welcome, Kelly May | Help | Log Out

**Concur** CA.GOV

Travel Reporting Administration Profile

Travel Reports

**Reports**

**Billing**

- Accrued Agency Travel Details
- Accrued Company Travel Details
- Agency All Company Travel Invoice Details
- Agency Invoiceable Travel Details
- Agency Travel Invoice Details
- Archived Agency Travel Invoice Details
- Archived Company Travel Invoice Details
- Billable Agent-Booked Trip Summary
- Billable Meeting Registrations By Agency
- Billable Meeting Registrations By Company
- Company Travel Invoice Details
- Concur Billing Accrued Agency/Direct Travel Details
- Concur Billing Accrued Company Travel Details
- Concur Billing Agency All Company Invoice Details
- Concur Billing Agency/Direct Travel Invoice Details
- Concur Billing Agency/Direct Travel Invoice Details with Names
- Concur Billing Annual Minimum Attainment Report
- Concur Billing Company Invoice Details
- Concur Billing Invoiced Trip Summary
- Concur Billing Reseller Indirect Customer List
- Invoiced Agent-Booked Trip

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Login	First Name	Last Name	EmailAddress	Credit Amount	Currency	Record Locator For Canceled Trip	Record Locator For Trip With Unused Ticket Credit
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IQ2KYS
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	ICCT6Z
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IN55FR
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IP25FN
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IL4S8B
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	I44OT6
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	I76LIB
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IRNE8U
melody@castate.org	Melody	Francis	melody.f@travelstoreusa.com	44.80	USD	I5NSAO	IMMQZW

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Internet | Protected Mode: Off

## FAQ

### **Is a SWABIZ account number required for the Southwest direct connect?**

Use of the Southwest direct connect will require each department to procure a SWABIZ Company ID. Your SWABIZ Company ID will be loaded into your department's Concur site to identify your travelers.

### **As a travel coordinator, will I still have to set up SWABIZ traveler accounts and assign travelers to the ghost card?**

No. Southwest direct connect replaces SWABIZ. Travelers will no longer need a SWABIZ log-in, and you will not have to assign travelers to the ghost card. The airline BTA stored in the Concur profile for your department will charge all Southwest airline transactions.

### **How do changes work with the Southwest direct connect?**

Currently, all Southwest ticket changes must be made by calling CALtravelstore at (916) 376-3989.

### **How do cancellations work with the Southwest direct connect?**

Currently, all Southwest cancellations must be made on Concur or by calling CALtravelstore at (916) 376-3989.

# FAQ

## **Will I be able to book Business Select fares?**

For all State departments, boards and commissions, the Business Select fares will be grayed out and not available for purchase. State Controller's Office will not reimburse Business Select fares.

## **How long can I hold my Southwest booking?**

The Southwest direct connect will allow trips to be put on hold for 24 hours unless otherwise instructed by the system. The fare is not guaranteed until ticketed. Trips on hold not submitted for purchase are automatically cancelled after 24 hours. When the user clicks on submit for purchase, Concur passes the form of payment to Southwest and they issue the ticket.

## **Will multi-segment trips be supported with Southwest direct connect?**

Yes, you can book Southwest multi-segment trips on Concur.

## **Is the Southwest frequent flyer number passed to Southwest?**

Yes, you can store your Southwest Rapid Rewards account number in your Concur profile under Frequent Traveler Programs so you can earn your rewards.

## **Are the discounts supported through the Southwest direct connect?**

Yes, the Southwest discounts announced in March 2012 are supported through your SWABIZ Company ID and the discounts will be displayed in Concur.