

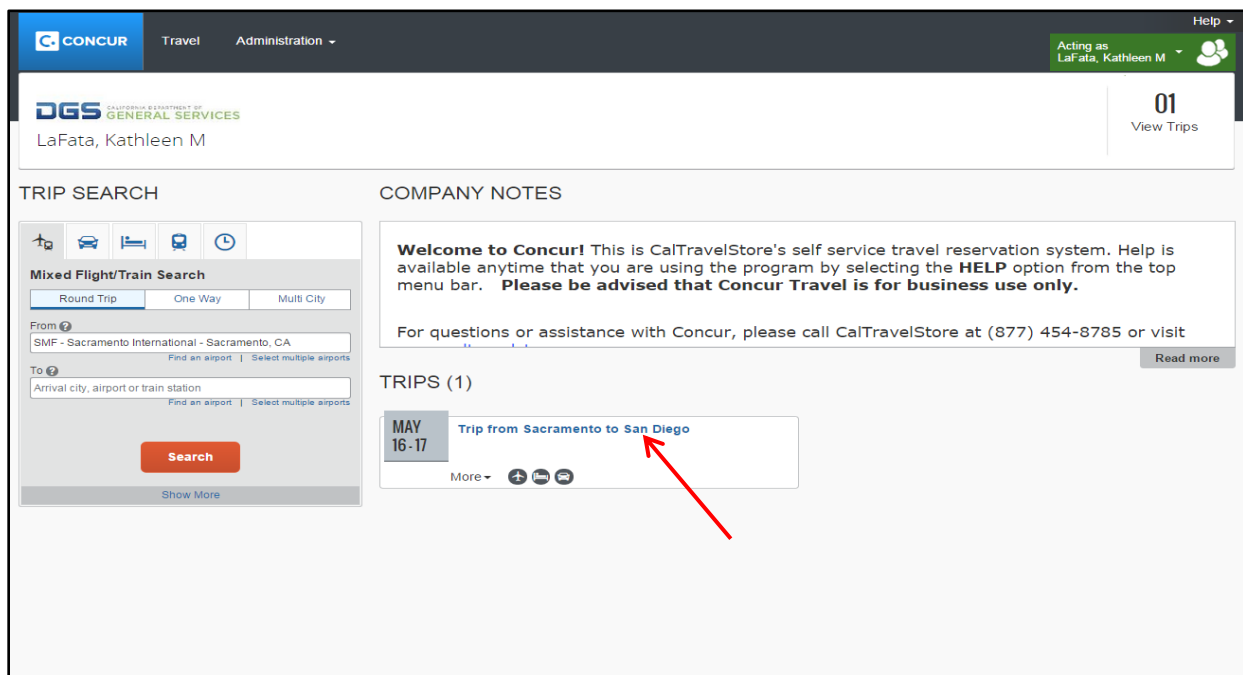
## How to Clone and/or Share a Trip Feature in Concur

**Clone Trip** (definition): To create a new trip for Traveler B that duplicates the exact trip that is already booked for Traveler A.

**Share Trip** (definition): A traveler may send an invitation to another traveler within the company to join them on their trip.

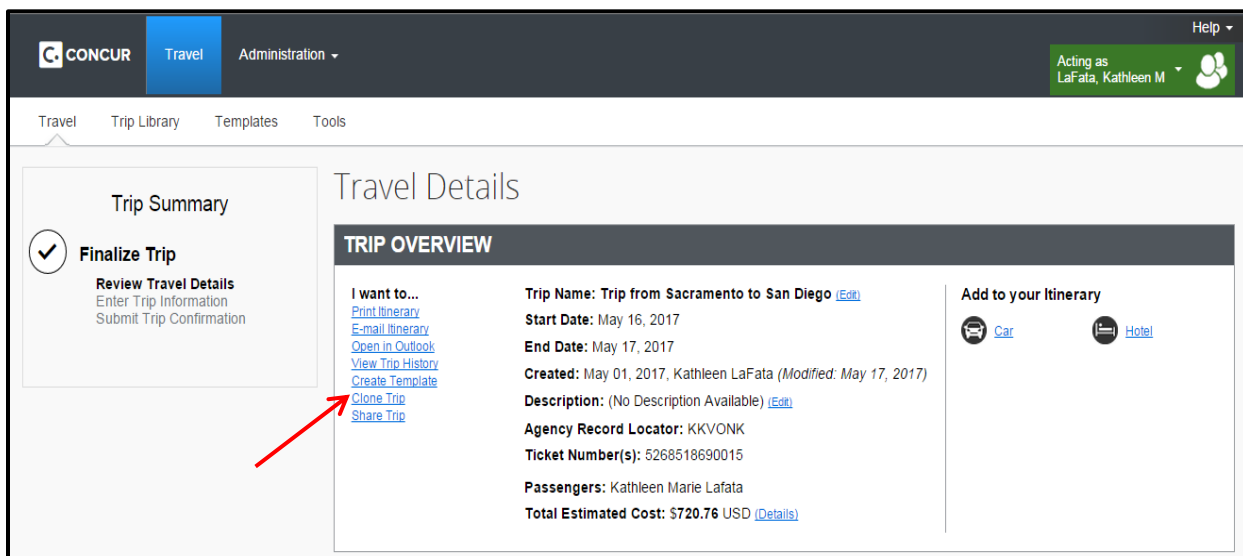
### CLONING A TRIP

A travel arranger may choose to 'Clone a Trip' for a second traveler. Select the first traveler's reservation under their **My Trips** section on the Concur home page, and then click on the trip name. You must be assigned as a travel arranger to "Clone a Trip".



The screenshot shows the Concur user interface. At the top, there is a navigation bar with 'CONCUR', 'Travel', and 'Administration'. The user is logged in as 'LaFata, Kathleen M'. Below the navigation bar, there is a 'TRIP SEARCH' section with a 'Mixed Flight/Train Search' form. To the right, there is a 'COMPANY NOTES' section with a welcome message. Below the company notes, there is a 'TRIPS (1)' section with a single trip listed: 'MAY 16-17 Trip from Sacramento to San Diego'. A red arrow points to the trip name.

Concur will open up the traveler's itinerary. Under **Trip Overview**, click on "**Clone Trip**".



The screenshot shows the 'Trip Overview' page. On the left, there is a 'Trip Summary' section with a 'Finalize Trip' button. The main content area is titled 'TRIP OVERVIEW' and contains the following information:

- I want to...** (with a red arrow pointing to the 'Clone Trip' link):
  - [Print Itinerary](#)
  - [E-mail Itinerary](#)
  - [Open in Outlook](#)
  - [View Trip History](#)
  - [Create Template](#)
  - [Clone Trip](#)
  - [Share Trip](#)
- Trip Name:** Trip from Sacramento to San Diego [\(Edit\)](#)
- Start Date:** May 16, 2017
- End Date:** May 17, 2017
- Created:** May 01, 2017, Kathleen LaFata (Modified: May 17, 2017)
- Description:** (No Description Available) [\(Edit\)](#)
- Agency Record Locator:** KKVONK
- Ticket Number(s):** 5268518690015
- Passengers:** Kathleen Marie LaFata
- Total Estimated Cost:** \$720.76 USD [\(Details\)](#)

On the right side of the 'TRIP OVERVIEW' section, there is an 'Add to your Itinerary' section with 'Car' and 'Hotel' options.

Once selected, the travel arranger will simply select the name of the second traveler from the drop down menu and the trip is created based on the choices selected.

**CONCUR** Travel Administration

Acting as LaFata, Kathleen M

Travel Trip Library Templates Tools

### Clone Trip

Trip Name: Trip from Sacramento to San Diego

Book for traveler: LaFata, Kathleen M.

[View Trip Information](#)

Search for these specific flights  I would like to do a general search  Refundable only air fares

Depart Date: 05/17/2017

**✈ Sacramento International (SMF) to Lindbergh Intl Arpt (SAN)**  
Southwest (WN) Flight Number 1467 Depart After 7:05 AM (Economy)

Search for this car

Pick Up: 05/17/2017 Return: 05/18/2017

**🚗 Car Rental at San Diego, CA, United States of America (SAN)**  
Renting from: Enterprise  
Pick Up: 8:30 AM  
Pick-up at: Lindbergh Intl Arpt (SAN)  
Return: 3:50 PM  
Returning to: Lindbergh Intl Arpt (SAN)  
Car Type: Intermediate Car, Automatic transmission Air conditioning

Search for this hotel

Checking In: 05/17/2017 Checking Out: 05/18/2017

**🏨 Hotel at San Diego, CA, United States of America (SAN)**  
2270 Hotel Circle N, San Diego, California, US, 92108  
Crowne Plaza  
Crowne Plaza

Property Code	Rate Code	Rate Amount
42941	KNG133A	125.00

Depart Date: 05/18/2017

**✈ Lindbergh Intl Arpt (SAN) to Sacramento International (SMF)**  
Southwest (WN) Flight Number 3691 Depart After 3:50 PM (Economy)

[Cancel](#) [Next](#)

**CONCUR** Travel Trip Library Templates Tools

Acting as LaFata, Kathleen M

Travel Trip Library Templates Tools

### Clone Trip

Trip Name: Trip from Sacramento to San Diego

Book for traveler: Guest Traveler

[View Trip Information](#)

Search for these specific flights  I would like to do a general search  Refundable only air fares

Depart Date: 05/17/2017

**✈ Sacramento International (SMF) to Lindbergh Intl Arpt (SAN)**  
Southwest (WN) Flight Number 1467 Depart After 7:05 AM (Economy)

Search for this car

Pick Up: 05/17/2017 Return: 05/18/2017

**🚗 Car Rental at San Diego, CA, United States of America (SAN)**  
Renting from: Enterprise  
Pick Up: 8:30 AM  
Pick-up at: Lindbergh Intl Arpt (SAN)  
Return: 3:50 PM  
Returning to: Lindbergh Intl Arpt (SAN)  
Car Type: Intermediate Car, Automatic transmission Air conditioning

Search for this hotel

Checking In: 05/17/2017 Checking Out: 05/18/2017

**🏨 Hotel at San Diego, CA, United States of America (SAN)**  
2270 Hotel Circle N, San Diego, California, US, 92108  
Crowne Plaza  
Crowne Plaza

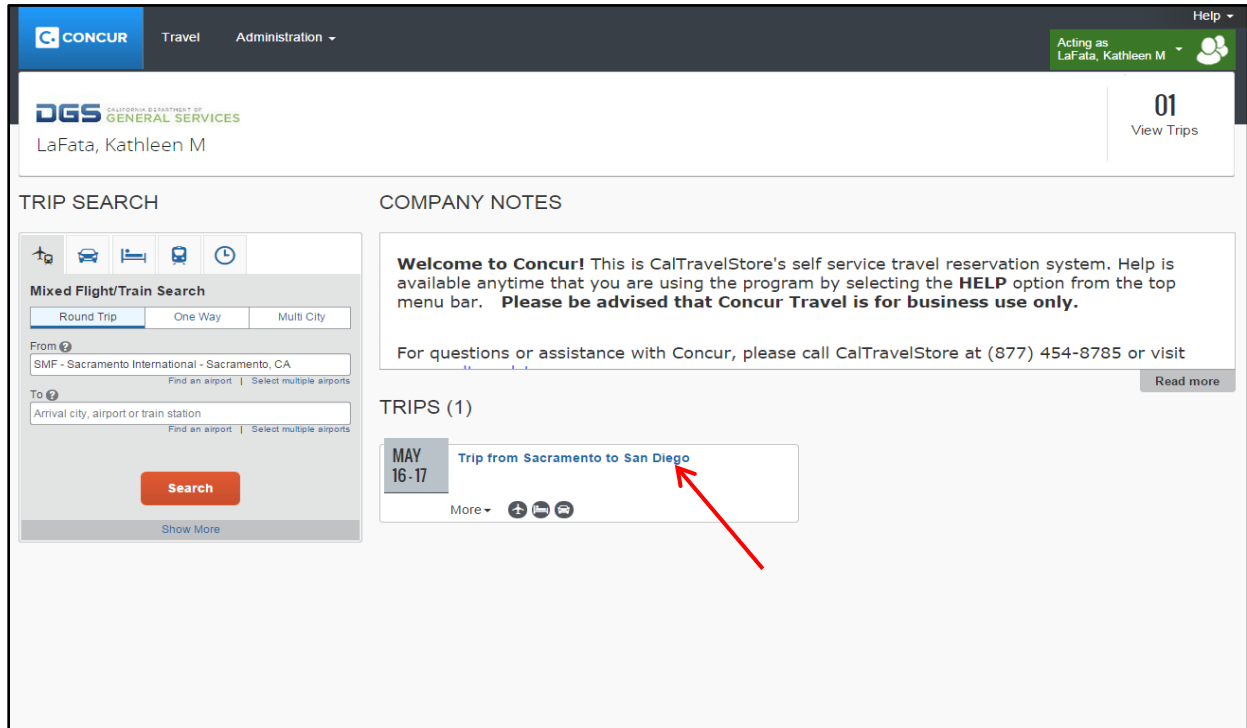
Property Code	Rate Code	Rate Amount
42941	KNG133A	125.00

Depart Date: 05/18/2017

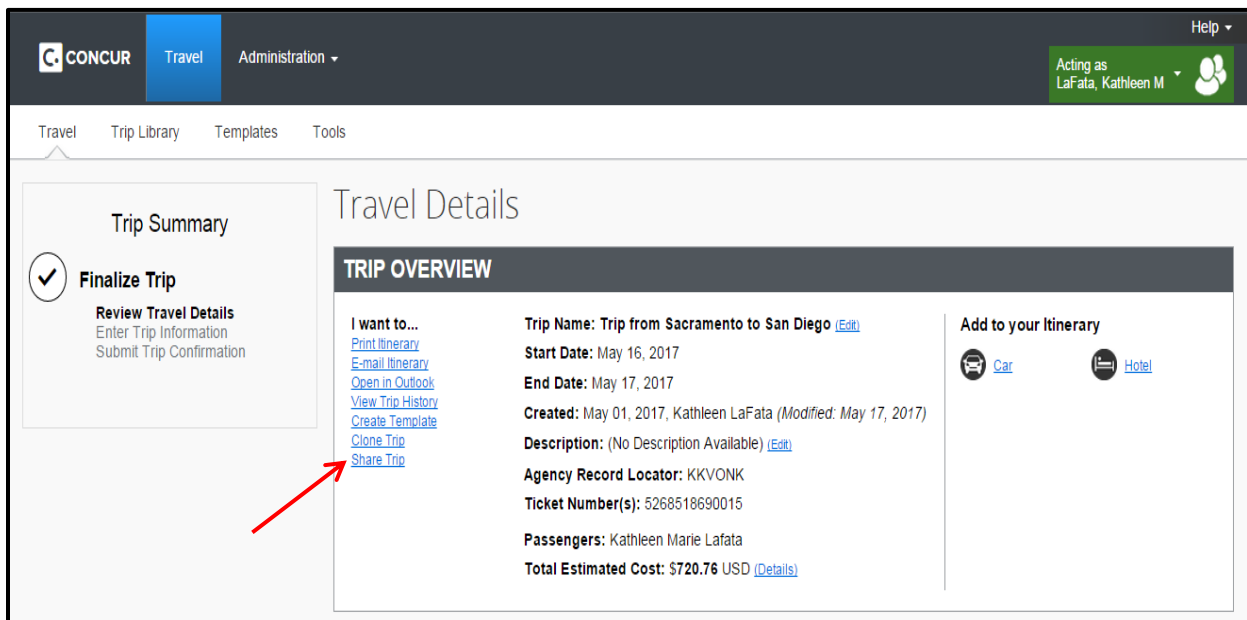
**✈ Lindbergh Intl Arpt (SAN) to Sacramento International (SMF)**  
Southwest (WN) Flight Number 3691 Depart After 3:50 PM (Economy)

## SHARING A TRIP

A traveler may choose to 'Share Trip' to send an invitation to another traveler within the same company to join them on the trip. Under the **My Trips** section on the Concur home page, click on the trip name.



Concur will open up itinerary. Under **Trip Overview**, click on “Share Trip”.



Select the name of whom you wish to invite. Click on **Search** if a name list is not present.

### Share Trip

Share this trip with:

Trip Name	Fare Quote	Locator	Start Date	End Date
Trip from Sacramento to San Diego	USD494.22	KKV/ONK	05/16/2017	05/17/2017

Invitation comments

Include Itinerary in email

Send my email as  HTML  Plain-text

The traveler whom you are sharing the trip with will receive an email invitation and an alert when he/she logs onto Concur. The recipient may accept (Concur automatically completes a new reservation to match the traveler's trip) or decline the invitation.

### E-mail Itinerary

Itinerary has been successfully sent to [kelly.bouchard@dgs.ca.gov](mailto:kelly.bouchard@dgs.ca.gov)

From: Concur <Travel@concur.com>  
To: Bouchard, Kelly@DGS  
Subject: Kathleen LaFata has invited you to share a trip named "Trip from Sacramento to San Diego."  
Message: 18e9d299-1135-4ba3-a8ec-7f7775a9056a.gif (58 KB) SMF-SAN/Lics (6 KB) SAN-SMF.ics (6 KB) Crowne Plaza.vcf (660 B)

This itinerary emailed by request of Kelly May Bouchard ([kelly.bouchard@dgs.ca.gov](mailto:kelly.bouchard@dgs.ca.gov)) on 5/17/2017 11:50:33 AM

Kathleen LaFata has invited you to share a trip named "Trip from Sacramento to San Diego." You can either view the trip itinerary or book a copy of it. Login to Concur. Your invitations will appear under the Travel Information Section.

Invitation comments from Kathleen LaFata

.

---

#### Trip Overview

**DGS** GENERAL SERVICES  
Trip Name: Trip from Sacramento to San Diego  
Start Date: May 16, 2017  
End Date: May 17, 2017  
Created: May 01, 2017, Kathleen LaFata (Modified: May 17, 2017)  
Description: (No Description Available)  
Agency Record Locator: KKV/ONK  
Ticket Number(s): 325551692015  
Passengers: Kathleen Marie LaFata  
Total Estimated Cost: \$720.76 USD  
Agency Name: CalTravelStore (State of CA RXDF)  
Address:  
CalTravelStore  
707 3rd street, 3rd Floor  
West Sacramento, CA 94608  
Daytime Phone: 877-454-8785  
Company Name: General Services

---

#### Reservations

Tuesday, May 16, 2017