Concur Travel & Expense

BOOKING TRAVEL VIA CONCUR
Booking Travel via Concur

- Overview
- Getting Started
- Booking Travel
  - Airfare
  - Car Rental
  - Hotel
- Cancelling/Changing Travel booked via Concur
- Concur Travel Resources
SF State has contracted Christopherson Business Travel (CBT) as our Travel Booking Agency. We recommend university employees use the online booking tool in Concur or calling a CBT Agent when booking a travel reservation including airfare, hotel reservations and car rental reservations.

If you prefer to call a CBT Agent and book your travel, please make sure to provide the Request ID of your Travel Request.
Overview

Benefits to booking via Concur...

✓ By booking via Concur, CSU contracts and rates apply, as well as CSU policies integrated within the system.

✓ The online booking tool is integrated within the Concur module creating a one go-to place for travel request, travel booking, and expense reporting.

✓ SF State has designated CBT agents who are trained specifically to assist SF State travelers.

✓ Incentives: The more we all use CBT, the better our negotiated rates will be.

✓ View every itinerary ever booked, securely store travel profile information, membership numbers and preferences to streamline booking your travel.

✓ CBT will manage, and ensure reuse of your unused tickets/credits.
Completing User Profile including Travel Preferences

- If Booking via Concur, you will need to complete all required fields and save your profile in order to book travel via Concur.

- Profile > Profile Settings > Personal Information

- Go through list of preferences and enter any information you would like to include in your profile. Required fields include:
  - Middle Name
  - Work or Home Phone
  - Gender
  - Birthdate
## Getting Started

### Travel Settings:

<table>
<thead>
<tr>
<th>Travel Preference Selection</th>
<th>Selection Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air, Hotel, &amp; Car Rental Preferences</td>
<td>Indicate any preferences such as seat selection, room type, accessibility needs, car transmission, etc. The online booking tool will take account the information you saved under these preferences when booking a reservation and/or flight.</td>
</tr>
<tr>
<td>Frequent-Traveler &amp; Advantage Programs</td>
<td>Indicate any programs/discounts such as AAA member, Government (system will already pull government rates), frequent traveler numbers.</td>
</tr>
<tr>
<td>TSA Secure Flight</td>
<td>Add Gender and Birthdate (requirement to book travel via Concur) and TSA Pre-check number if applicable.</td>
</tr>
<tr>
<td>International Travel: Passports and Visas</td>
<td>Add Passport/International Visa information.</td>
</tr>
<tr>
<td>Assistants and Travel Arrangers</td>
<td>Add a primary travel assistant and/or travel arrangers.</td>
</tr>
<tr>
<td>Credit Cards</td>
<td>US Bank Travel Ghost Card will already be linked to book and pay for airfare through Concur Travel. You can add a Personal Liability Travel Card, or a personal credit card to reserve hotel.</td>
</tr>
</tbody>
</table>
Getting Started

- **Primary Travel Assistant vs. Travel Arranger** – A **Travel Arranger** can perform travel functions such as book travel on a traveler’s behalf whereas a **Primary Travel Assistant** can also receive confirmation emails from CBT (Christopherson Business Travel) regarding the travel as well as ability to update profile information.

- In order to make someone a Travel Assistant/Arranger, you must also make them a **delegate** for Travel Request/Expense.

![Image showing the Concur user interface for adding an assistant](image-url)

Start typing employee name and list will populate with all matches. Then check the appropriate box/s:
- Can book travel for me
- Is my primary assistant
Getting Started

Booking Travel from an Approved Request...

Completing the Travel Request:

- **Travel Request Header** - One of the required fields asks the question: *How will you book your travel?* Choose the drop down option *1- Book via Concur Travel*.

- **Segments** - Complete all fields of each segment that is applicable to your travel as the provided information prepopulates the search criteria on the online booking tool.
  - If you indicate *Book via Concur Travel* and you added Airfare as a segment, the system will require you to book your airfare through Concur.

- Please do not use the Trip Search on the Concur Homepage to book travel. However, you can use the Trip Search to gain estimates for your Trip and Travel Request.
Once Travel Request is approved...

- Click on **Requests > Manage Requests**
- Locate your Request you want to book travel for
- Click on **Book** (under Action)

Pending on-line booking means your request is approved and travel ready to book.
Booking your Itinerary

- Your itinerary will appear based on the information you provided in your Segments.
- Add any additional information required such as departure times or pick up locations.
- Click on Proceed to Booking.
- System will search based on your itinerary. Booking order: Airfare, Car Rental, then Hotel.
The system will save the lowest cost airfare in the search results. For any flights with a price 20% greater than the lowest cost airfare, the system will display a warning icon next to the blue reserve button.

Your name in Concur (Primary Name) is the name used to book your flight. If your name is not identical to what’s on your Driver’s license/Passport, please book airfare outside of Concur or change your primary name with HR.

For any flights with a price 20% greater than the lowest cost airfare, the system will display a warning icon next to the blue reserve button. This means the flight is out of compliance.

Reason and justification is required at the time of booking any travel that is out of compliance. An approved Authorization for One-Time Exception form may be required in order to get full reimbursement.

The US Bank Travel Ghost Card will be charged for airfare when booking via Concur. Once posted, the transaction including E-Receipt will appear under Available Expenses to later add to your Expense Report. Payment Type will come through as Ghost Card – USBank.

You must book your airfare through Concur Travel if added as one of your segments.
All Car Rental reservations should be booked through SF State’s preferred vendors - Enterprise or National.

Rental up to an intermediate size vehicle is allowable under the CSU Travel Procedures. Larger vehicles may be allowable if there is a no-cost upgrade provided or if the recommended sizes are not adequate to meet the business purpose of the trip.

A matrix of all car options including car type, amount, and vendor will appear. Preferred vendors will list at the top.

You do not need to add a card or provide payment in order to book a car rental reservation. You will need to provide payment at the time of car pick up.
Hotel Reservation

- Maximum nightly room rate is $275 before tax. If you book a hotel greater than $275 you will only receive reimbursement for the max rate of $275 plus any applicable taxes charged, unless an approved Authorization for One-Time Exception form is attached to your Expense Report.

- Hotels that offer government rates will show as available.

- If a conference is doing room blocks for their attendees, please do not book through the online booking tool and book directly with the conference/vendor. CBT is unable to access the discounted rates you would get with these room blocks.

- You will need to add a credit card on file in order to guarantee your hotel reservation. However, this card will not be charged and you will need to supply a credit card to the vendor at the time of payment.

- Please do not add a P-Card or a Departmental Travel Card (unless it is in your name) to a user profile. However, you can add a Personal Liability Travel Card or personal credit card.
Travel Out of Compliance/Policy

- Any travel not within university policy, will display a warning icon 🚨 and a description of why the selection is out of policy. You should only choose travel that is in compliance.

- If you make a selection that is out of compliance, you will be required to choose a reason from a drop-down list of why you are making that particular selection and add a comment of justification. Your selection will be logged for reporting in addition to a screenshot of availability of choices during that time of booking.

- Please note: If you purchase any travel that is out of policy/compliance, your reimbursement may be denied unless proper justification is specified or an approved One-time Exception is attached to your Expense Report.
Review Booking Information

Once you have made your selection, you will need to review and change your itinerary if necessary from the Travel Details page.

- **Trip Overview** – Review information for accuracy. Print or email itinerary from the I want to section or add to your itinerary.

- **Trip Booking Information** – enter additional information about your trip. Enter or modify trip name and enter email addresses for anyone needing trip information.

- Once all is completed, click **Confirm Booking** to send your request to the travel agents. The Finished! Screen shows your confirmation # and information to contact the travel agent.

You will receive an email confirmation from Christopherson Business Travel once your reservation is booked.
Flight changes are available for e-tickets that include a single carrier. If the trip is already ticketed but has not occurred, you can change the time and/or date of the flight. Your change options will be with the same airline and routing.

When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket/credit will be retained that you can apply to future trips.

If you need to cancel a reservation you made through Christopherson Business Travel, and you want to cancel the entire trip including the Travel Request:

1. Click the Travel Tab at the top of the Concur Homepage. Then, click the Upcoming Trips Tab.
2. Under Action, click Cancel Trip.

If you want to cancel a portion of your travel only, and not the entire travel, please do not cancel through the Online Booking tool and contact a Christopherson Business Travel Agent. They can cancel any part of your reservation.
All travel booked through the online booking tool or a CBT Agent, will load under My Trips.

Options to load your travel itinerary into My Trips that you booked outside of Concur:

1. Link your Trip it Pro Account to Concur
   a) You can sign up for TripIt Pro (under connected Apps in your User Profile) to organize all your travel plans in one simple, mobile itinerary.
   b) If you already have a TripIt account, you can link your existing TripIt account to Concur.

2. forward your travel reservation confirmations to plans@concur.com to have the details automatically added to your itinerary.
   a) Make sure to verify your email address under your User Profile which you will use for forwarding your booking information. You can add an email address or use the one already in your profile and click the Verify button to submit your email for verification.
Christopherson Business Travel may charge a service fee depending on the travel type and service provided.

- Service fee will come through from US Bank and will load as a separate transaction (available in Available Expenses) to be moved over to your Expense Report to be covered using the chartfield indicated on the Expense Report.

- The charge of the service fee is dependent on the service provided. Please see the chart to the right for the fee structure.

<table>
<thead>
<tr>
<th>SERVICE PROVIDED</th>
<th>FEE CHARGED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concur Airline Booking Fee (per booking)</td>
<td>$5.00</td>
</tr>
<tr>
<td>Airline Booking Fee Non-Concur (per booking)</td>
<td>$26.00 Domestic</td>
</tr>
<tr>
<td>Airline Booking Agent Assisted</td>
<td>$17.00 Domestic</td>
</tr>
<tr>
<td>Concur Lodging Booking Fee (per room)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Lodging Booking Fee Non-Concur (per room)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Lodging Booking Agent Assisted</td>
<td>$10.00</td>
</tr>
<tr>
<td>Concur Ground Transportation Reservation Fee (per reservation)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Ground Transportation Reservation Fee Non-Concur (per reservation)</td>
<td>$10.00</td>
</tr>
<tr>
<td>Ground Transportation Reservation Fee Agent Assisted (per reservation)</td>
<td>$10.00</td>
</tr>
<tr>
<td>Travel Modification Request Fee (per request)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Conference Booking Fee (per booking)</td>
<td>$26.00 Domestic - $35.00 International</td>
</tr>
<tr>
<td>Concur International Booking</td>
<td>$5.00</td>
</tr>
<tr>
<td>International Booking Non-Concur</td>
<td>$35.00</td>
</tr>
<tr>
<td>International Booking Agent Assisted</td>
<td>$17.00</td>
</tr>
<tr>
<td>Miscellaneous Fee (if any)</td>
<td>Hotel Prepay Logic – per generated card $3.00</td>
</tr>
</tbody>
</table>
Concur Travel Resources

Contacting a Christopherson Business Travel (CBT) Agent:

- **Individual Travel Reservations**-
  - Hours of business: 5:00am – 6:00pm PST
  - Phone: (800)-285-3603
  - Email: csu@cbtravel.com

- **Concur Travel Technical Questions – Online Concur Travel Assistance**
  - Domestic Number: (888) 535-0179
  - Online support email: onlinesupport@cbtravel.com

- **Emergency After Hours Assistance:**
  - Domestic (800) 960-7862 (6LV), International Direct Dial (682-233-1914)
  - Please only call in an emergency.
For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at:
https://fiscaff.sfsu/travel.com