Concur Travel & Expense
Booking Travel via Concur
Booking Travel via Concur

- Overview
- Getting Started
- Booking Travel
  - Airfare
  - Car Rental
  - Hotel
  - Rail
- 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 approved Travel Request.
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
## 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 that you allow to book travel on your behalf.</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>
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.
Once you have an approved Travel Request and you want to book travel via Concur, you can simply book travel by using the **Trip Search** on the Concur Homepage or accessing your **Travel** tab.

Click on segment you want to book

Please note: You can book your travel all together, or book it separately. For example. Book airfare and then add car rental at a later time.
Airfare

• 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 update your primary name with HR.

• Instant Purchase carriers such as Frontier and Spirit are not in Concur. You will also not find Basic Economy tickets as a selection. You would need to make these particular purchases outside of Concur.

• 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 (if enabled) will appear under Available Expenses to later add to your Expense Report. Payment Type will come through as Ghost Card – USBank.
• Fill in the Trip Search criteria (**From/To, Depart/Return**) and click **Search** when done.
Change Search if needed.

Overview of availability using Search Results

Shop by Fare or by Schedule

Click on View Fares once you find the flight you want
• Availability for that flight will list. The most economical option will default.

• Click on the Amount after you made your selection.
Review the information and click Reserve Flight and Continue.
Airfare

- **Travel Details** will give you another overview.
- Click clicking **Next**, and then **Confirm Booking** till you see you’re finished!
- If you change your mind or want to choose a different flight, click **Cancel Trip**
  - You will receive an email your trip is cancelled.
- Once you finish your booking, the information will get sent to CBT and they will book your reservation and send you a confirmation email once completed.
- 2-3 days later, 2 US Bank ghost card transactions will appear under your **Available Expenses** section of your Concur Homepage.
• 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.

• Only Preferred vendors will list as options. Only in the case that Enterprise or National are not available, will other vendors be available to select.

• 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.
Car Rental

• Enter your search criteria (Pick-up/Drop-off dates and location) and click Search.

Indicate actual time you want to pick-up and drop-off. The availability is based on the time and date indicated.
Car Rental

San Francisco State Administration & Finance

Overview of availability using Search Results

Change Search if needed.

Only contracted vendors will show if available. Our vendors are Enterprise and National.

Click on the amount of the car you want to reserve.
No payment is due. You will pay with the vendor directly once you pick up/drop off the car.
Car Rental

Travel Details will give you another overview. Click clicking Next, and then Confirm Booking till you see you’re finished!
If you change your mind or want to choose a different flight, click Cancel Trip.
You will receive an email your trip is cancelled.
Once you finish your booking, the information will get sent to CBT and they will book your reservation and send you a confirmation email once completed.
• 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 if available. Make sure the government rate is state government and not federal.

• If a conference is doing room blocks for their attendees, please do not book though 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.
• Enter your search criteria (Check-in/Check-out Dates and location) criteria and click Search.
Change Search if needed.

Click on View Rooms to see availability at that hotel.
Preferred government rates may appear. Make sure the vendor accepts State government rates. For any preferred rate, you may need to show the hotel a member card or your SFSU ID in order to receive the indicated rate.
Need to have a personal credit card on file in order to guarantee a hotel reservation

Review the Rate Details and Cancellation Policy, click that you agree to the rules and then click Reserve Hotel and Continue
• **Travel Details** will give you another overview.
• Click clicking **Next**, and then **Confirm Booking** till you see **you’re finished!**
• If you change your mind or want to choose a different flight, click **Cancel Trip**.
  • You will receive an email your trip is cancelled.
• Once you finish your booking, the information will get sent to CBT and they will book your reservation and send you a confirmation email once completed.

• If your hotel base rate is more than $275 (CSU Policy), you will need to attach an approved Exception form to your Expense Report prior to submitting your Expense Report.
• 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.
Cancelling/Changing Travel Reservations

- 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/change 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/change any part of your reservation. Additional service fees may apply (cancelling is free).
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.

All your trip information either booked via Concur or imported through plans@concur.com will show up under My Trips.
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.
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.
Need More Information?

• For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at: [https://fiscaff.sfsu.edu/content/sf-state-travel-center](https://fiscaff.sfsu.edu/content/sf-state-travel-center)
Contact Us at:

Accounts Payable
1600 Holloway Ave. ADM. 351
San Francisco, CA 94132

Phone
415-338-2808

Email / Website
concur@sfsu.edu
https://fiscaff.sfsu.edu/content/sf-state-travel-center