Step-by-Step Guide:

Booking Employee Travel in Concur

Before You Begin:

This guide assumes you have already logged into Concur for the first time and updated your profile. Profiles must be reviewed and certain information required by the Transportation Security Administration (TSA) to travel must be entered/updated before you can book in Concur. If you are unsure of how to log into Concur and review/update your profile, please refer to the First Time Login guide first.

- **Submit a Concur Request:** All employees should submit a Concur Request prior to making travel arrangements.

- **Obtain a University Travel Card:** A University Travel Card is required for booking all employee travel arrangements. You may NOT charge travel arrangements to a University Purchasing (p-card), and the University will NOT reimburse any out-of-pocket expenses until the expense report is submitted AFTER the trip ends. Contact the FSC with any questions.

- If your conference, etc. requires you book lodging, etc. directly through the registration site or another source to get the conference rate, you may do so and forward your itinerary/confirmation to plans@concur.com (your e-mail address must be verified in your profile).

**Step-by-Step Procedures:**

1. Log into your Concur profile.

*If you are booking on behalf of another employee, you will need to be assigned by that employee as a travel arranger/assistant (See First Time Login guide). You will need to select that person’s name from your Profile Menu under “Acting as other user” which will put everything you book in that person’s name and charge to their payment method.*
2. There are several ways to book a trip within Concur. One way is from your Concur Home Screen. Find the Trip Search section on the left side of your screen.

*You can book your flight airfare, rental car, and hotel during the same search. To only book one detail of the trip – such as your flight – use the corresponding tabs along the top of the Trip Search.

3. Select one of the flight options: Round Trip, One Way, or Multi City.

4. In the Departure City and Arrival City fields, enter the cities, airport names, or airport codes for your travel. You can also Find an Airport or Select multiple airports using the links underneath each city field.

5. Click in the Departure and Return date fields and select the appropriate dates from the calendar. Also select the appropriate departure and return times. The system will return results based on these times and the +/- number of hours selected in the dropdown boxes. If your schedule is flexible, expand the +/- number of hours to the maximum of nine so you will receive the maximum results (also, once in the search, you can click “View all results” to remove any depart/arrive time constraints and see all options).

6. To book a rental car during this search, check “Pick-up/Drop-off car at airport”.
7. To book a hotel stay during this search, check the **Find a Hotel** box. You can choose to search for a hotel by: Airport, Address, Company Location, or Reference Point/Zip Code (a city or neighborhood). For example, search by address to locate hotels close to a certain location.

8. In the **Search by** section, select either **Schedule** or **Price**. If searching by schedule, you will manually choose a departing and returning flight. If searching by price, the system will automatically match and present round trip options in order of least to most expensive.

9. If you wish, you may specify a preferred airline for this trip by checking the box next to “Specify a carrier” and selecting the one you want. Remember, not all airlines fly all routes, so if you choose an airline and it does not appear on the results screen, it may not fly between your selected cities.

10. Click **Search**.
11. A new screen loads with a matrix (grid) summarizing your airfare search results across the top of the screen, with your search results appearing below.

12. If you wish to narrow your results, select a column header, row header, or cell of the matrix. You may also use the toggle bars on the left side of the screen to filter your results even further. For example, you can filter your results by airports, connecting airports, or depart/arrival times.

For example, you would click this cell to view only the nonstop flights on United.
Booking Employee Travel in Concur, Cont’d.

Reserving a Flight, Cont’d...

Shop by Schedule:

13. Select your preferred outbound flight by clicking the radio button to the left of the flight. Your selection then appears at the top of the list as a Chosen Carrier. Repeat for your preferred return flight.

Click the Price these options button; then click the Select button (Green Select buttons indicate the most economical choices).

Shop by Fares (Price):

13. Select your preferred flight pair by clicking the Select button. (Green Select buttons indicate the most economical choices.)

14. Once taken to the next screen, review the flight, traveler, and frequent flyer program and make any necessary changes. Select your seat assignments if that is an option (for some airlines it is not). Review the price summary and select your travel card as the method of payment.

15. Click Reserve Flight and Continue
Selecting a Rental Car...

If, when entering your search criteria, you checked the **Pick-up/Drop-off Car at Airport** box:

16. Next, your rental car search results appear. Similar to the flight search, a matrix summarizing your search results appears at the top of your page.

17. Just as with the flight results, if you wish to narrow your results, select a column header, row header, or cell of the matrix. You may also change your search with the options on the left side of the screen.

*Note: Vendors with a yellow diamond under or next to their name (Enterprise, Hertz, Avis) are University preferred vendors with which Trinity has negotiated rate contracts. Our rates are what you see in the booking tool.*

18. Select your appropriate rental car by clicking the **Select** button.

19. Once taken to the next screen, review the car and driver information, making changes as necessary. Choose your rental car agency program if applicable. Review the price summary.

20. Click “**Reserve Car and Continue**”
Selecting a Hotel Room...

If, when entering your search criteria, you checked the Find a Hotel box:

21. Next, your hotel search results will appear. A map displays your search results in relation to the location criteria you selected/entered as part of your search criteria.

22. You can sort the list of hotels by Preference, Price, Rating, and Distance. To view more hotel selections, click Next near the bottom of your screen.

23. Use the options on the left side of your screen to filter your results further.

24. Click the Choose Room link for a specific hotel to find more detailed information, including room types and room rates.

25. Select which hotel room to reserve by clicking the radio button on the left side of your room selection. Then, click Select.

26. Review the hotel reservation, guest information, and Hotel program, making any necessary changes. Enter any room preferences, review the price summary, select the travel card as method of payment and review the cancellation policy.

27. Click “Reserve Hotel and Continue”
Completing Your Reservation...

28. The Travel Details page appears. Review the itinerary. If necessary, click the appropriate change link along the right side of your screen to make changes. When ready, click *Next*.

*Note: You can e-mail the itinerary to someone for their review prior to finalizing the purchase. Link in the Trip Overview at the top of this page.*

29. Next, the Trip Booking Information page appears. If desired, update your trip name (this will be what it is listed as in your trip library), enter a description, enter any comments for the travel agent, select e-mail confirmation preferences, and TripIt Privacy preferences.

30. If you have an *unused ticket* you can use for this trip, select it. If you do not have an unused ticket, you will need to select “No, do not apply unused tickets” from the Dropdown menu.

31. Click the *Next* button.

32. The Trip Confirmation page appears. Review the trip details one last time. Click *Purchase Ticket* at the bottom of the page to complete your trip booking.

33. A confirmation message will appear.