Booking Trips in the Concur Travel & Expense System

What can be booked online using Concur Travel?

The Concur Travel & Expense System can be used to book *domestic* airfare, rental cars, and hotels for your University trips. It cannot be used to book your international University travel.

You can always contact Christopherson Business Travel, the University's approved travel agency, to book your trip directly with a travel agent. (Christopherson should be contacted for international travel.) However, use of the Concur Travel & Expense System to book your domestic trip will result in a discounted travel agency fee.

Before you begin your online booking, you will need to know your departmental SpeedType. Your airfare will be charged directly to this SpeedType. In order to book a hotel using Concur Travel & Expense you must also have your University Travel Card (application is found here).

Booking Trips Using Concur Travel

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

 Begin by accessing Concur via <u>your campus portal</u>. Locate your CU Resources section and, under the Business Applications area, select the Concur Travel & Expense System link.

a. If booking a trip on behalf of the employee traveling, act as a travel arranger. Refer to the Step-by-Step Guide <u>Acting as a Delegate or Travel Arranger</u> for further information.

- 2. From your **My Concur** home page, look to the **Trip Search** section on the left side of the page.
- 3. Select one of the following types of flight options: **Round Trip**, **One Way**, **Multi-Segment**.
- 4. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. When you type in a city, airport name, or airport code, it will automatically search for a match.
- 5. Click in the **Departure** and **Return** date fields, then select the appropriate dates from the calendar. Also, select the appropriate departure and return times. The system will search before and after the times you select based on the **+/- number of hours** selected in the dropdown boxes.



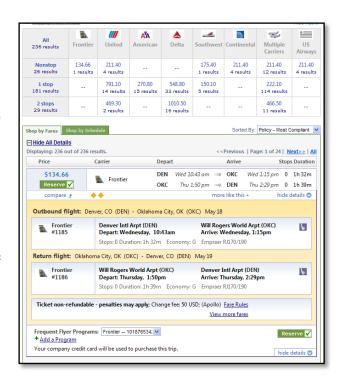
Finance & Procurement Help Desk: 303.837.2161 For additional learning resources, visit www.cu.edu/psc.

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- To book a rental car during this search, select the Pick-up/Drop-off Car at Airport checkbox.
- 7. To book a hotel stay during this search, select the **Find a Hotel** checkbox. You can choose to search for the 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 Flights by:** section, select how you first wish to review the airfare results (either by **Price** or by **Schedule**).
- 9. Click the **Search** button.

Reserving a flight...

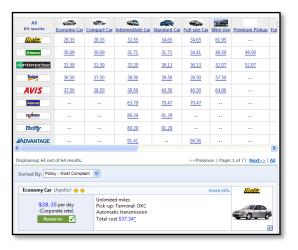
- 10. A grid (matrix) summarizing your airfare search results will appear at the top of the page, with your search results appearing below.
- 11. To filter your results, select a column, row, or cell from the matrix. For example, to view only the nonstop flights click the "Nonstop" cell.
- 12. Use the toggle bars on the right side of your screen to filter your results even further.
- 13. Select your preferred flight by clicking the green **Reserve** button. (Green **Reserve** buttons indicate the most economical choices.)



Selecting a rental car...

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

- 14. Next, you will see your rental car search results. Similar to the flight search, a matrix summarizing your search results will appear at the top of the page.
- 15. To filter your results, select a column, row, or cell from the matrix.
- 16. Select your appropriate rental car by clicking the green **Reserve** button.



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Selecting a hotel room...

If, when entering your search criteria, you checked the **Find a Hotel** checkbox (and you have a Travel Card):

- 17. Next, you will see your hotel search results. A map will display your search results in relation to the location you selected/entered as part of your search criteria.
- 18. You can sort the list of hotels by Preference, Price, Rating, and Distance. To view more hotel selections, click the **Next** button on the bottom of the screen.
- 19. Use the options on the right side of your screen to filter your results further, such as by hotel amenities or those that provide e-Receipts within Concur. (E-Receipts are receipts that are electronically provided to Concur and automatically attached to the corresponding expense during the trip reconciliation.)



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

If there is a special conference rate available, make the reservation through the conference site instead of within Concur.

- 21. When you are ready to reserve a hotel room, click the green **Reserve** button for the appropriate hotel and rate.
- 22. Review the information on the Rate Details/ Cancellation Policy pop-up window, confirm and then click **Continue**.

Completing your reservation...

- 23. Review the details of the reservation on the **Trip Details** page. If necessary, change any element of your trip by clicking the appropriate **change** link along the left side of your screen. When ready, click **Next**.
- 24. On the **Trip Booking Information** page, enter the trip information in the **Trip Name** and **Trip Description** fields and enter any comments that you have for the travel agency. The trip name becomes the Report Name of the expense report when it is time to reconcile your trip expenses.

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- 25. Enter the appropriate **SpeedType** to which your airfare will be charged.
- 26. If your trip is grant funded, select **Yes** in the **Is This Grant Funded?** dropdown box and provide justification for your trip in the field that appears.
- 27. Click the **Next** button.
- 28. Your itinerary appears again, with the trip information just entered, for final review. Click **Purchase Ticket**, at the bottom of the page, to finalize your trip.
- 29. Your itinerary will appear one last time, now with a green **Finished!** message in the upper left corner.

Your itinerary will be automatically emailed to several people:

- You
- Your HRMS supervisor
- Your primary travel arranger, if one is designated
- The person who booked your trip, if it wasn't you
- The other email addresses listed in your Concur Profile, if any