SAP Concur

BOOKING TRAVEL

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Before booking travel in Concur, please be sure the following has been completed to avoid errors:

- Concur Profile has been updated completely with current information. All required fields must be completed as instructed.
- Verify state email address in profile so you may utilize the receipts@concur.com function.
- State Travel Card has been saved in Concur Profile.
- Sign up for eReceipts. This can be found under the Alerts section of the home page.
- Travel Card has available credit to support purchases.

When travel arrangements are booked in Concur, a "Trip" is created. It is very important to refer to this "Trip" if any adjustments need to be made to your arrangements, such as adding a rental car or canceling a flight. This prevents additional Agency Booking Fees from being charged to your account. More information on where you can find the trip information will be discussed later in this job aid in the **MY TRIPS/TRIP LIBRARY** section.

This job aid walks you through the steps to book air, car and hotel individually. When you begin the initial trip search, you will have the option to search for air, car and hotel all at one time.

BOOKING A FLIGHT

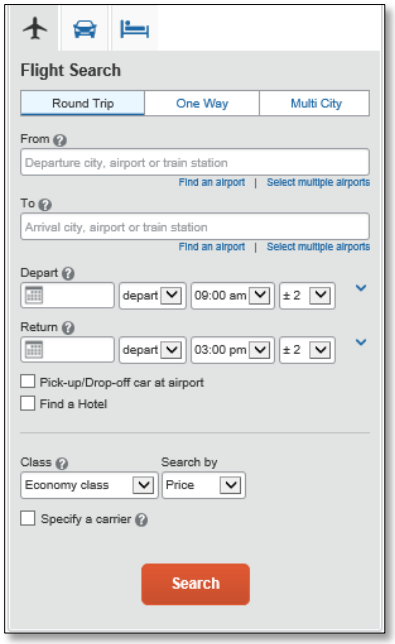
From Concur home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations ***without*** a flight, use the **Hotel** and **Car** **Search** tabs, respectively.

You can access the Flight tab by doing one of the following:

On the Concur home page, on the menu bar, click **Travel**.

On the Concur home page, on the menu bar, click the SAP Concur logo at the top left of the screen.

The **Flight** tab is on the left side of the page.

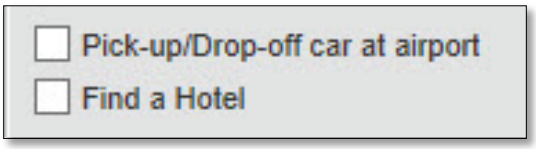


Step 1: Start the Search

1. Select one of the following types of flight options:
   - Round Trip
   - One Way
   - Multi City
2. In the **From** (Departure City) and **To** (Arrival City) fields, enter the cities for your travel. When you enter a city, airport name, or airport code, Concur will automatically search for a match.

   Note: Use the **Find an airport** and **Select multiple airports** links as needed.
3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the appropriate time range.
4. Click the ▼ arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary, to see/reserve nonstop flights.

   Notes:
   - Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all the flights available for that time slot.
   - If you change locations or dates, click **refresh graph** for more data.
5. If you need a car, click the **Pick-up / Drop-off car at airport** check box.



   - If you need an off-airport car or have other special requests, you can skip this step and add a car later from your itinerary.
6. If you need a hotel, click the **Find a Hotel** check box.

   Additional fields appear.
   - Choose to search near an **Airport**, **Address**, **Company Location**, or **Reference Point / Zip Code**, and then enter the appropriate information in the available fields.
   - If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel later from your itinerary.

     Note: ***Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.***
7. You may also specify which airline you would like to search for if you have a preference by selecting the **Specify a carrier** check box.

Note: You can only search one vendor at a time, and this will override the preferred airline searches normally done for all the frequent flyer number carriers.

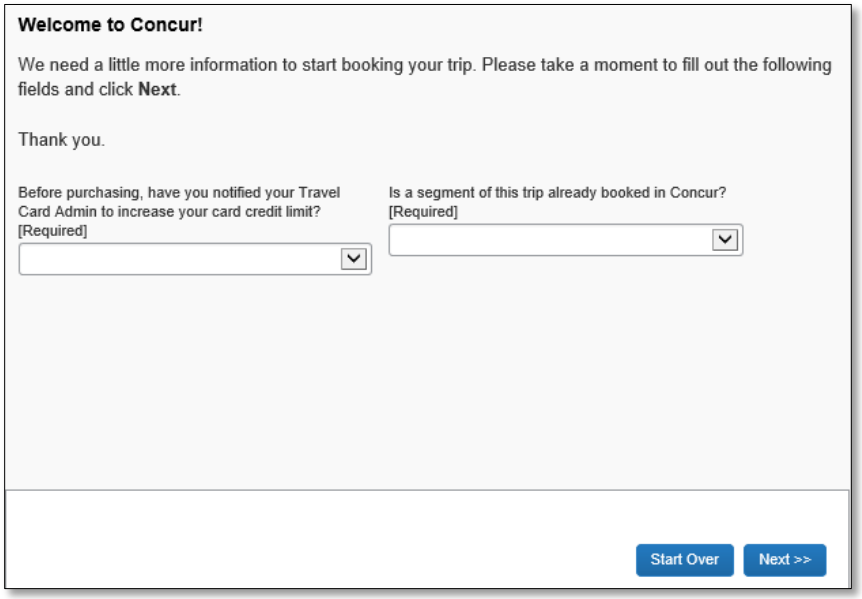
If you click the **Specify a carrier** check box, a list of carriers appears that are color coded:

- The first (yellow) will be their frequent flyer carriers.
- The second (gray/khaki) are the most requested airlines.
- The remaining airlines are in alphabetical order.

8. You are also able to select the appropriate class of service.
9. Click **Search**.

Step 2: Providing Information

1. The traveler will be prompted to answer 2 questions in order to continue with their search.
2. "Before purchasing, have you notified your Travel Card Admin to increase your card credit limit?"
    a. If this has been done, you may continue with your search.
    b. If this has not been done, you must get your credit limit adjusted or your reservations will not be booked.
3. "Is a segment of this trip already booked in Concur?"
    a. If you are trying to edit or add a reservation to an existing trip, cancel this search and access the current trip through the Trip Library in the Travel module. More information on where you can find the trip information will be discussed later in this job aid in the **MY TRIPS/TRIP LIBRARY** section.
    b. If this is a new trip, you may continue with your trip search.
4. If your card has the appropriate credit limit and this is a new trip, select "Next".

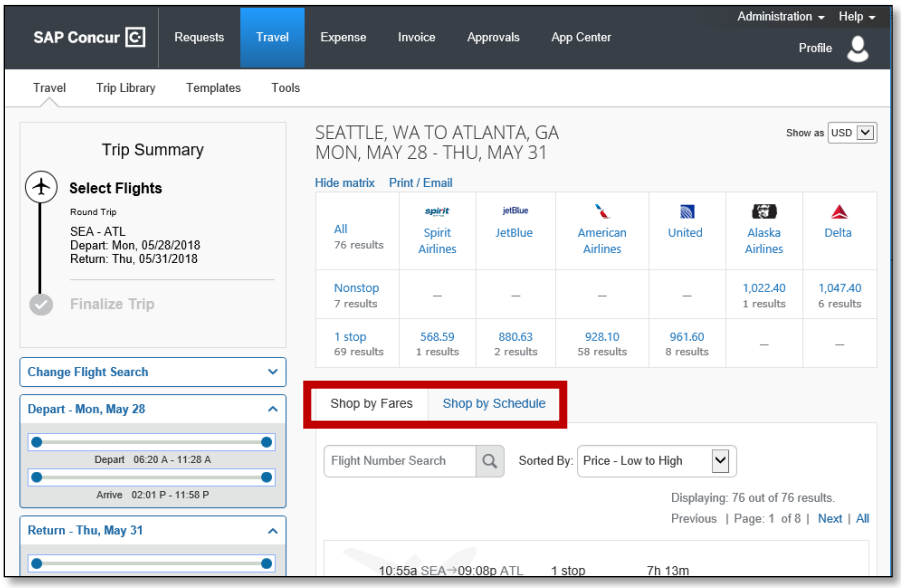


The flight search results appear.

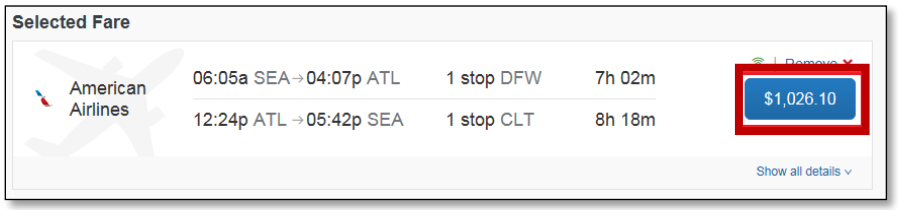
Step 3: Select a Flight

On the **Flight Search** results page:

1. You have the option to **Shop by Fares** or **Shop by Schedule** to review available flights.



2. On the **Shop by Fares** tab, to view additional details for the flights, click the **Show all details** dropdown arrow.
3. To select a flight, click the fare button.



Policy for airfare is based on the *Least Cost Logical Flight*. This is the cost of what a non-stop flight would be if that flight was an available option. Anything $25 over that cost is marked with a yellow caution sign.

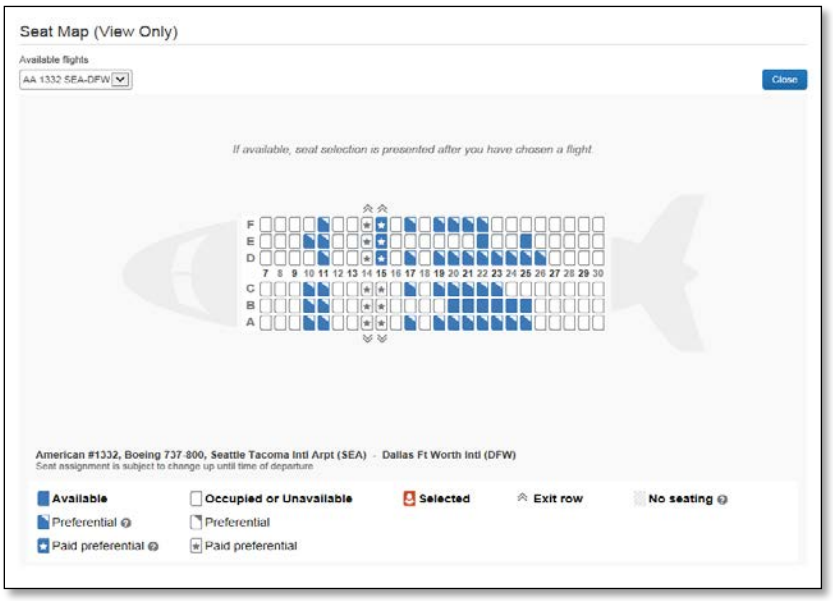
Note that a yellow caution sign next to the **Fare** button will indicate if the selection is out of policy compliance. If one of these flights is selected, you will be prompted to select a reason and this information will be sent to your supervisor, along with the results of your search.

Flights marked with a red exclamation point as **Not Allowed** are Basic Economy flights. Basic economy flights are against state policy because if the flight needed to be canceled, the ticket price could not be transferred to another flight. They appear in the Concur search for informational purposes only.

4. On the **Review and Reserve Flight** page, you can do the following:

- Review your flight details
- Enter your traveler information
- Select your frequent flyer programs
- Select your seat assignment
- Review the price summary
- Select your method of payment

  Note: Depending on your airfare provider, you may be able to click the **Select a seat** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**. If the airfare provider does not allow seat selection at this time, you will be able to make your selection further along in the process.



5. Click **Reserve Flight and Continue**.

Step 4: Select a Rental Car

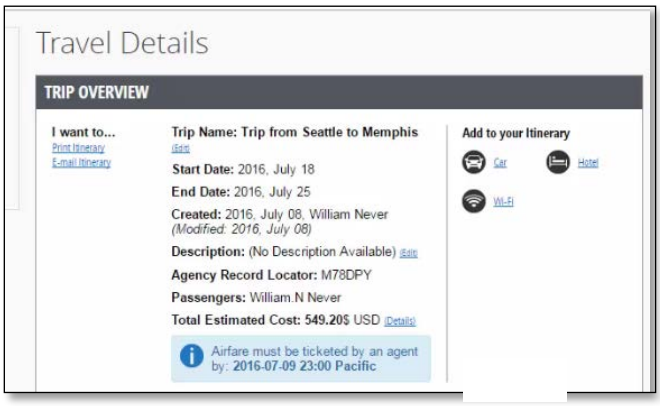
If you requested a car on the **Flight tab Search**, the rental car search results appear. For information about booking a rental car, see **Booking a Car** in this document.

Step 5: Select a Hotel

If you requested a hotel on the **Flight tab Search**, the hotel search results appear. For information about booking a hotel, see **Booking a Hotel** in this document.

Step 6: Review the Travel Details Page (Itinerary)

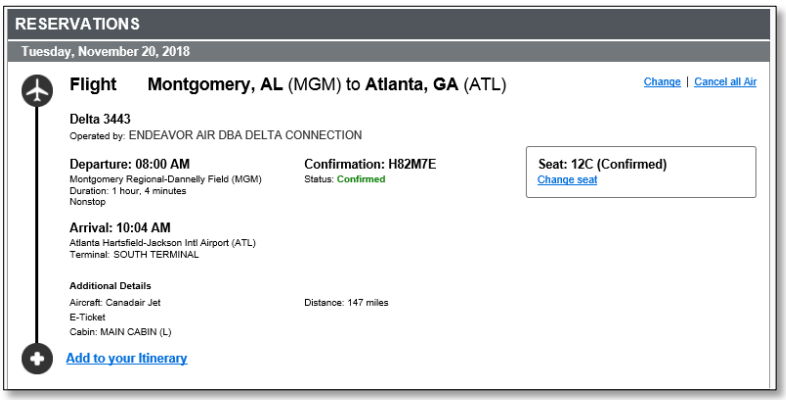
1. On the **Travel Details** page, review and change your itinerary, if necessary.
2. In the **Trip Overview** section:
   a. Review the information for accuracy.
   b. In the **I want to** section, print or email your itinerary as appropriate.
   c. In the **Add to your Itinerary** section, add a car, hotel, as needed.



3. In the **Flight** section:
   a. Verify the information for accuracy.
   b. Click **Select Seat** or **Change Seat** to select or change your seat option (depending on the airline).
   c. Your company might allow you to change or cancel your flight from the itinerary page. If so, click **Change** or **Cancel**, and then follow the prompts to change your outbound or return flight.

      Travelers given the option to change a flight will be able to select a different date or time for the trip but must stay on the same airline.

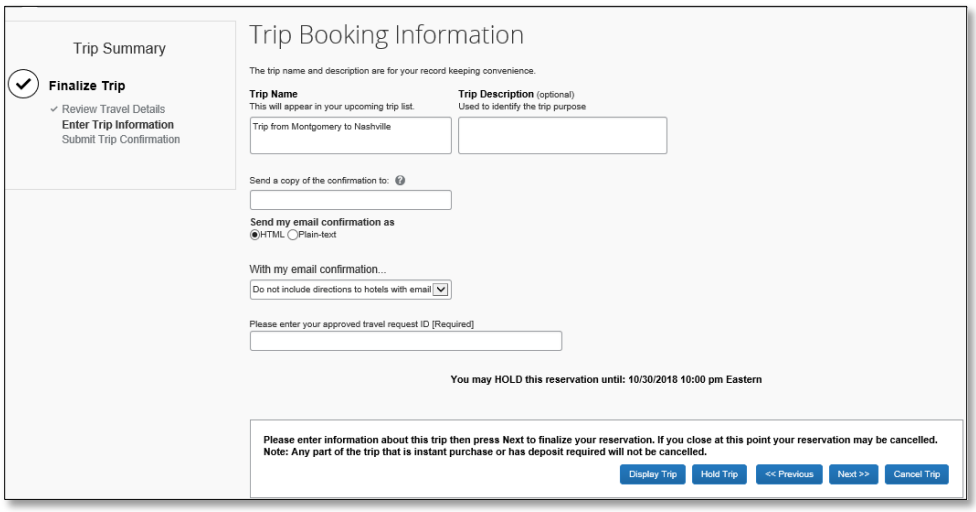
      Note: Changing a flight can result in fare changes.
   d. Click **Cancel all Air**, as needed.



4. Review the remaining sections and make the appropriate changes.
5. Review the **Total Estimated Cost** section.
6. Click **Next**.
7. The **Trip Booking Information** page appears.

STEP 7: REVIEW THE BOOKING INFORMATION

Use the **Trip Booking Information** page to enter additional information about your trip.



1. Enter or modify your **Trip Name**.

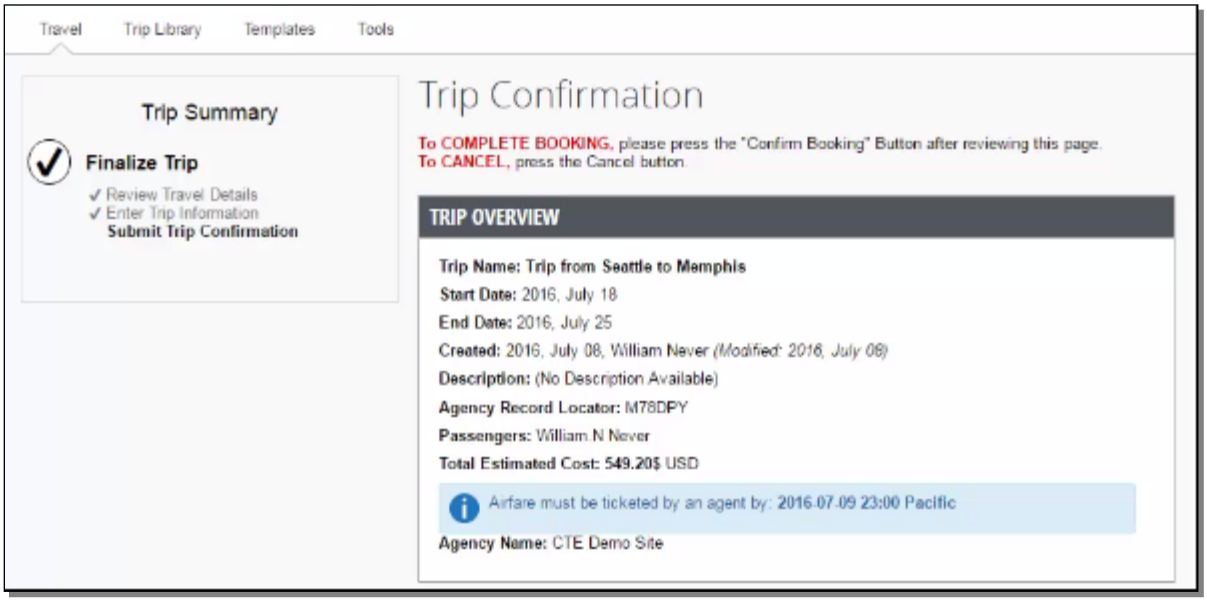
   This is how the trip will appear on your itinerary and in the automated email from Concur. This will also appear under "My Trips" on your home page.
2. Enter a **Trip Description** (optional).
3. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.

   If you book the trip, you will automatically receive the email. If you book the trip as an arranger, you will also receive the email.
4. Choose your preferred email format, either plain text or HTML.
5. You will also be able to choose whether you would like to receive directions or maps to the hotel.

   This information will be part of the initial email from Concur.
6. The approved travel request ID must be entered in the required field. You will not be able to proceed with booking if you do not have this information.
7. Click **Next**.

Note: You will have the option to hold a trip. Travel will always display the length of time this trip can be held on this page. **Pay close attention to the date and time displayed; if the trip is not submitted, approved, and ticketed by the date and time displayed, in most cases it will be automatically cancelled**.

Concur displays your itinerary on the **Trip Confirmation** page. This itinerary will include any messages about ticketing policies.



Step 8: Purchase the Ticket

1. Click **Purchase Ticket** to send your request to the travel management company. At this time, your agency will be charged a $5 booking fee by the travel management company. Cancellations may be allowed within the same day without a charge to the travel card, but the booking fee is nonrefundable.

   The **Finished!** screen shows your confirmation number and information to contact the travel agent.

2. Click **Return to Travel Center**.

BOOKING A CAR

If you are booking a car related to an existing trip, be sure to access this trip through your Trip Library to add the car booking. This will prevent additional booking fees on your account.

STEP 1: SEARCH FOR YOUR CAR

If you require a car ***but not airfare***, from the Concur home page, request the car using the **Car** tab instead of the **Flight** tab.

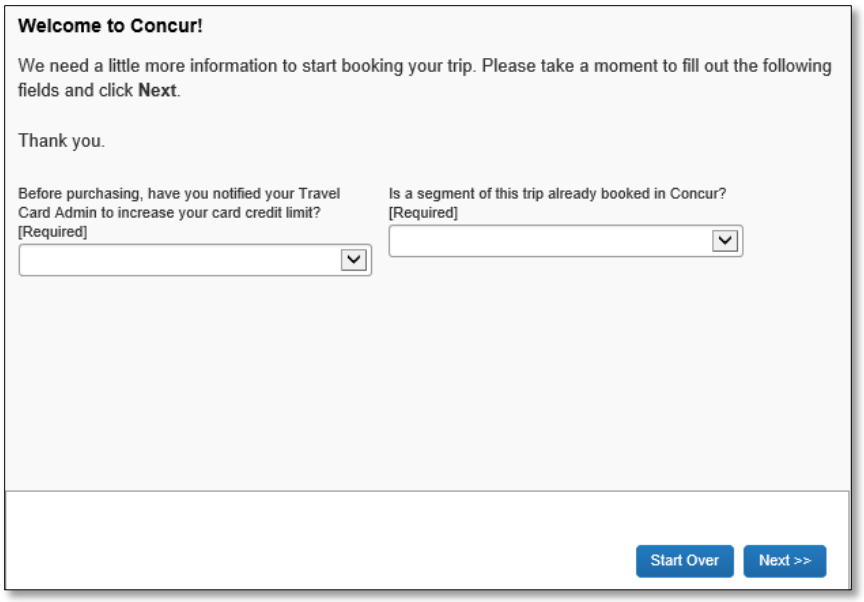
1. Enter your **pick-up** and **drop-off dates** and **times**.
2. In the **Pick-up car at** section, select either:
   - **Airport Terminal,** and then type the city or the Airport code.
   - **Off-Airport,** and then enter (or search for) the location.
3. Select the **Return car to another location** check box, as needed.

   If you want to return the car to another location, additional fields will appear. Select either **Airport Terminal** or **Off-Airport**, and then enter the appropriate location.
4. To see additional search preferences, click **More Search Options**.
5. Select the **Car Type**.

   Tip: Hold the Ctrl key to select more than one type.
6. Select all your preferences, and then click **Search**.

STEP 2: PROVIDING INFORMATION

1. The traveler will be prompted to answer 2 questions in order to continue with their search.
2. "Before purchasing, have you notified your Travel Card Admin to increase your card credit limit?"
   a. If this has been done, you may continue with your search.
   b. If this has not been done, you must get your credit limit adjusted or your reservations will not be booked.
3. "Is a segment of this trip already booked in Concur?"
   a. If you are trying to edit or add a reservation to an existing trip, cancel this search and access the current trip through the Trip Library in the Travel module. More information on where you can find the trip information will be discussed later in this job aid in the **MY TRIPS/TRIP LIBRARY** section.
   b. If this is a new trip, you may continue with your trip search.
4. If your card has the appropriate credit limit and this is a new trip, select "Next".



The rental car search results appear.

Step 3: Filter the Results

There are two sets of filters: The matrix at the top of the page, and the **Change Car Search** area on the left side of the page.

To filter your results using the Change Car Search area

1. On the left side of the page, use the show ⌄ and hide ⌃ arrows.
2. Select the **Use my default credit card** check box, if needed.

   This is the credit card that you set up as your default in your profile.
3. In the **Change Car Search** area:
   - Change your pick-up and drop-off dates and times, and your pick-up and drop-off locations.
   - Click **More Search Options** to select additional options such as a car type, and vendors.
4. Click **Search**.

   The new search results display.

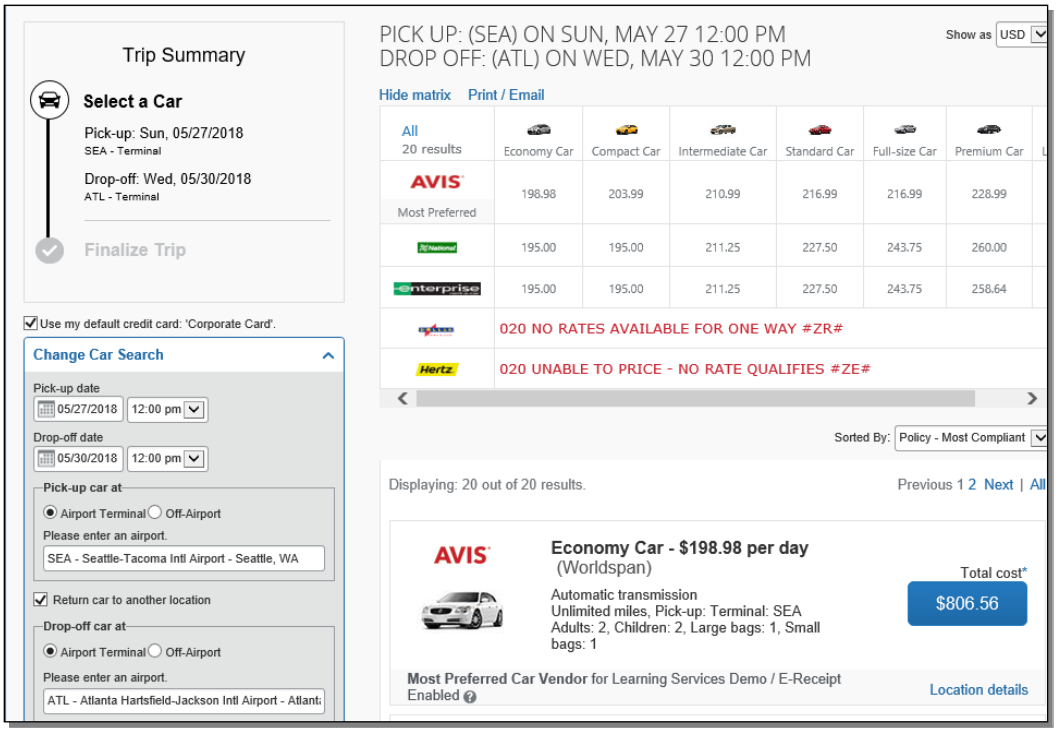
To filter your results using the Matrix at the top of the page

1. Use the grid to filter the results.
   - The preferred vendors are those on state contract (Enterprise and National).
   - The shaded column, if any, displays the type of car defined in your company's travel policy.
   - To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
   - To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
   - To see cars of a particular size ***and*** a particular vendor, click the appropriate cell. The search results below will reflect that choice.

Step 4: Sort the Results

If you want to sort your results, click the **Sorted By** dropdown arrow, and then select the appropriate option.

Step 5: Review the Results



1. Review the price and options.
2. Click the picture of the car (if available) to see a larger picture as well as passenger and luggage capacity.

3. Click **Location details** for more information about the available options.

Step 6: Select the Rental Car

1. Click the **Total cost** button.

   Policy for rental cars is set up to identify those vendors on state contract. The search results will display the yellow caution next to vendors other than Enterprise and National.

   Note that a yellow caution sign next to the **Total cost** button will indicate if the selection is out of policy compliance. If this is the case, you will be prompted to select a reason and this information will be sent to your supervisor. If there is another vendor that has a more economical option, you may make that selection and notate that the car was cheaper from the drop-down.

   The **Review and Reserve Car** page appears.

2. Review the details for accuracy.
3. Select a rental car program, as needed.
4. Select a method of payment, if necessary.
5. Click **Reserve Car and Continue**.

   If you requested the car using the Flight tab, and you elected to reserve a hotel room, Travel will display those search result pages.

BOOKING A HOTEL

If you are booking a conference hotel, you will not use the Travel module. You will need to book the hotel directly with the conference in order to get the conference rate. If you are booking a hotel related to an existing trip, be sure to access this trip through your Trip Library to add the hotel booking. This will prevent additional booking fees on your account.

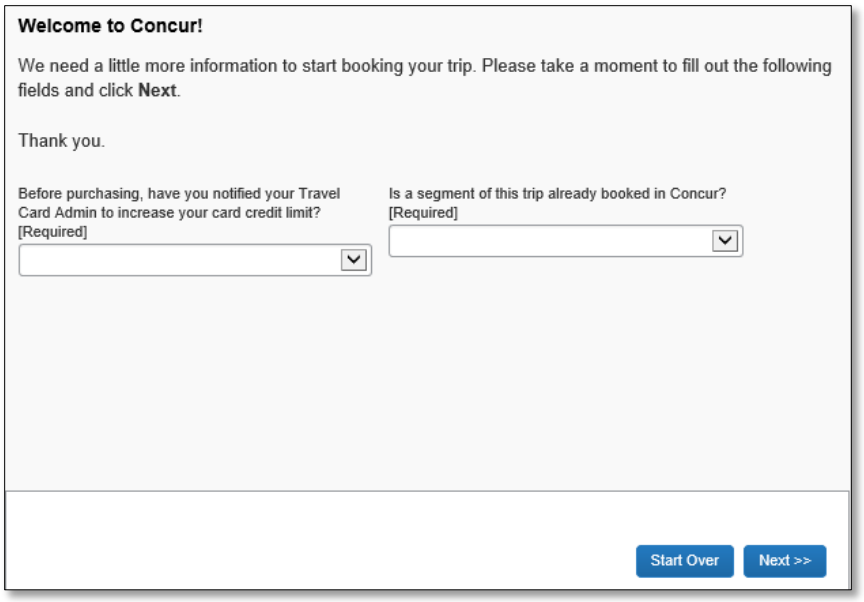
STEP 1: SEARCH FOR YOUR HOTEL

1. If you require a hotel ***but not airfare***, from the Concur home page, click the **Hotel** tab.
2. Enter the **Check-in** and **Check-out Dates** (or click in the fields to use the calendar).
3. Enter the search radius.

   Concur will always show *company preferred hotels* within a larger radius, usually 30 miles or kilometers.
4. Choose to search near an Airport, Address, Company Location, or Reference point / Zip Code, and then enter the appropriate information in the available fields.
5. If you will be using more than one hotel on your trip, select the **Add Another Hotel** check box. Additional fields will appear. The **Check-in Date** field for the second hotel is automatically populated with the check-out date of the first hotel. Change the date as necessary.
6. Click **Search**.

STEP 2: PROVIDING INFORMATION

1. The traveler will be prompted to answer 2 questions in order to continue with their search.
2. "Before purchasing, have you notified your Travel Card Admin to increase your card credit limit?"
   a. If this has been done, you may continue with your search.
   b. If this has not been done, you must get your credit limit adjusted or your reservations will not be booked.
3. "Is a segment of this trip already booked in Concur?"
   a. If you are trying to edit or add a reservation to an existing trip, cancel this search and access the current trip through the Trip Library in the Travel module. More information on where you can find the trip information will be discussed later in this job aid in the **MY TRIPS/TRIP LIBRARY** section.
   b. If this is a new trip, you may continue with your trip search.
4. If your card has the appropriate credit limit and this is a new trip, select "Next".



The hotel search results appear.

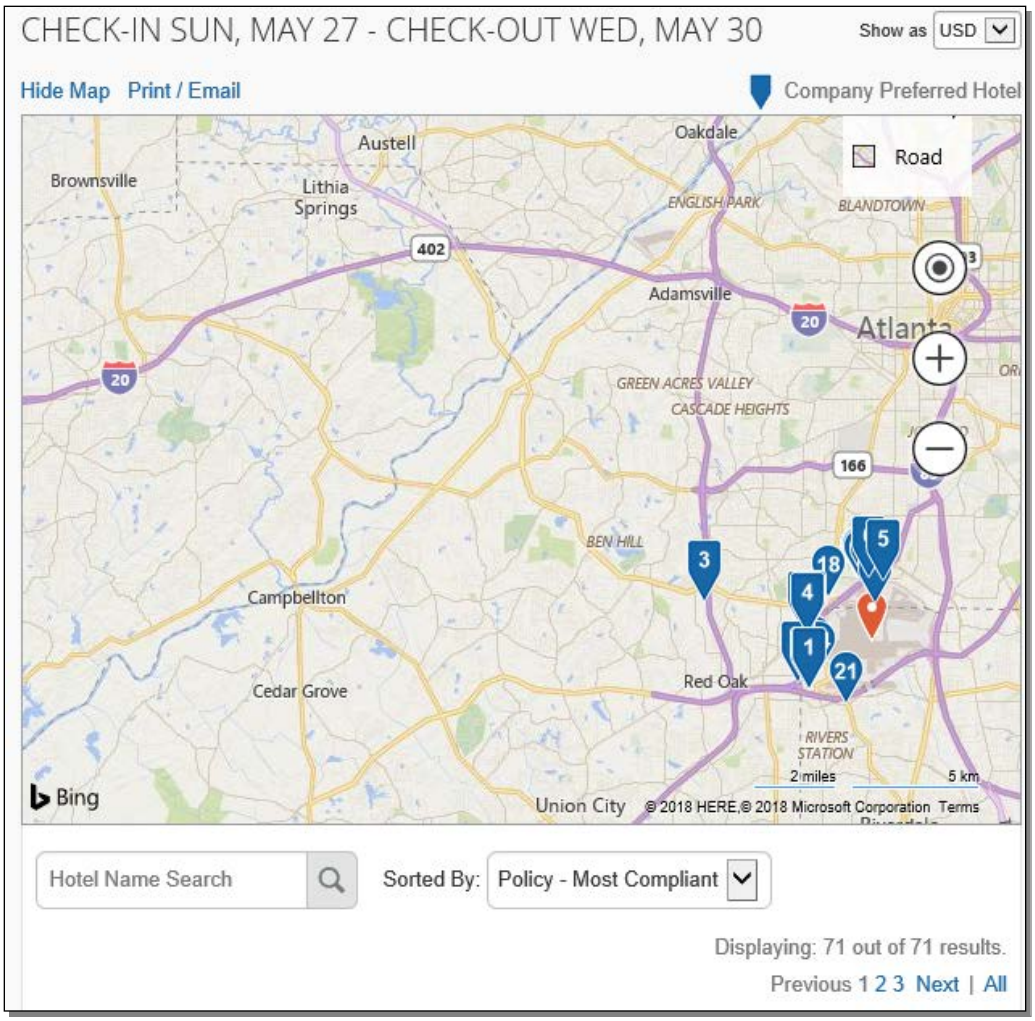
Step 3: Change and Filter your Search

1. In the **Change search** area:
   - Change your check-in and check-out dates, and your hotel location.
   - Click **Search**.

   Travel displays the new results.
2. Use the slider in the **Price** area to narrow your search.
3. In the **Hotel chain** area, select the appropriate hotels.
4. In the **Hotel Amenities** area, select the appropriate options.

Step 4: Review the Hotel Map

1. Review the hotel map.



2. Click any blue icon to see specific hotel information. Use your mouse to zoom, and move the map, as needed.

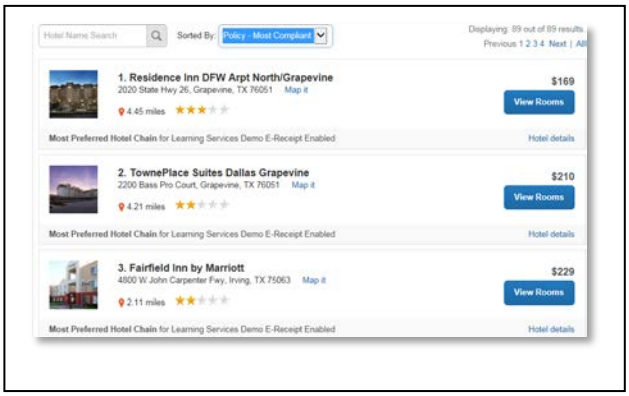
   The red icon indicates your reference point, and the blue icon shows your company's preferred hotels.

Step 5: Sort the Search Results (as needed)

Below the map, use the **Hotel Name Search** and **Sorted By** fields to sort the results.

Step 6: Review the Results

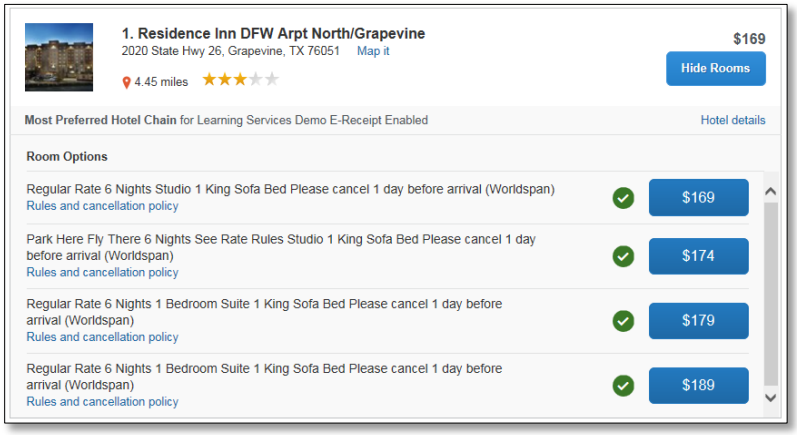
A picture, as well as, the name, address, rating stars, and price range appears.



1. Click the picture to see more images.
2. Click **Hotel details** to see contact information, street address, cancellation policy, and information about the facility.
3. Click **View Rooms** to see:
   - The available room options and rates
   - Other amenities per room/rate
   - Rules and cancellation policy

Step 7: Select the Hotel Room

1. Click the **Cost** button next to the room that you want to reserve**.**



Policy for hotel rooms is based on the government lodging rate for the destination.

Note that a yellow caution sign next to the **Fare** button will indicate if the selection is out of policy compliance. If this is the case, you will be prompted to select a reason and this information will be sent to your supervisor.

The **Review and Reserve Hotel** page appears. Navigate through the page and:

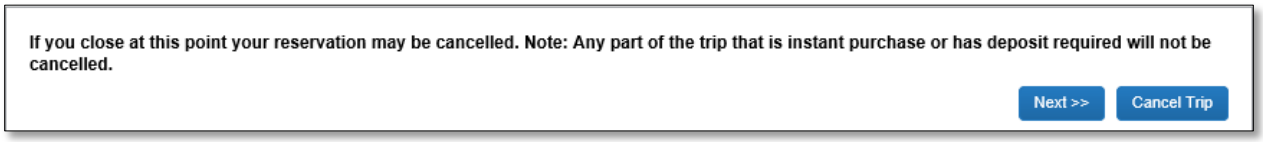
- Review or modify the room preferences.
- Verify or modify the guest and program information.
- Review the price summary.
- Select a method of payment, if available, as defined by your company's configuration.
- Review and accept the rate details and cancellation policy.

2. Select the I agree to the hotel's rate rules, restrictions, and cancellation policy check box.
3. Click **Reserve Hotel and Continue**.

   Your **Travel Details** page (itinerary) displays.

REVIEWING TRAVEL DETAILS

1. In the **Trip Overview** section, verify the travel dates and passenger information is correct.
2. You may also add Car or Hotel reservations to your itinerary at this time, if you have not already done so.
3. The **Reservations** section is a detailed listing of all travel details:
   - Outbound Flight – seat assignments can be changed
   - Car Rental
   - Hotel
   - Inbound Flight – seat assignments can be changed
4. The **Total Estimated Cost** section will break down the cost by major category.
5. If all details are accurate, you can continue with the booking process by selecting **Next**. If you need to make adjustments, select **Cancel Trip** to start the search process over.



TRIP BOOKING INFORMATION

1. **Trip Name** – Concur defaults the format to list the upcoming trip as follows:

   "Trip from Montgomery to Seattle"

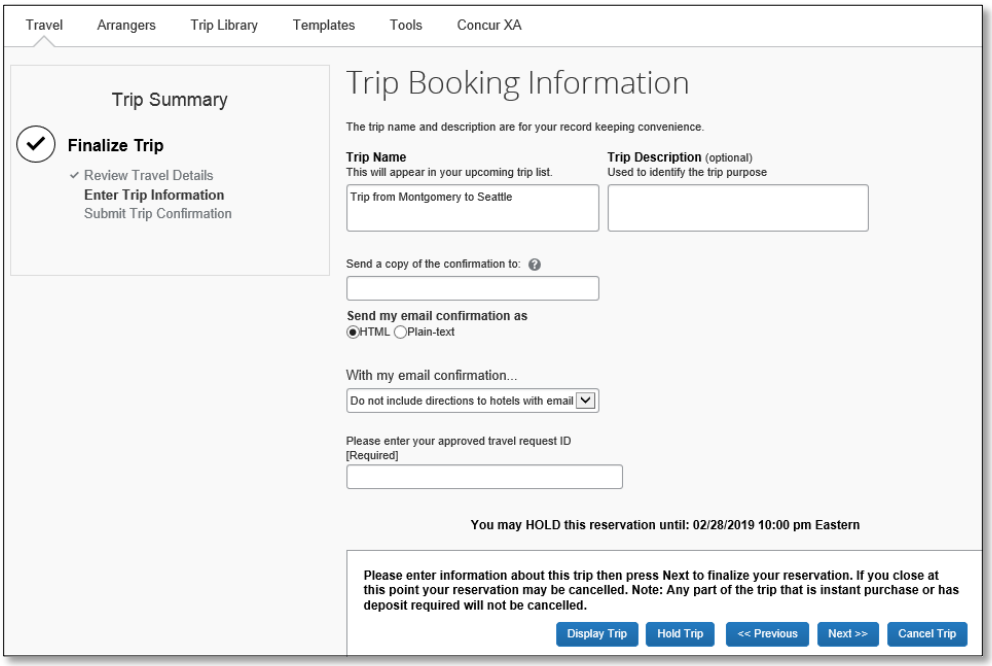
   The name is only for the traveler to keep track of upcoming trips, so it can be edited to the traveler's preferred format. The trip name will appear on your itinerary and in the automated email from Concur, as well as the My Trips section of your home screen and the Trip Library in the Travel module.

2. The next field is available to add one or more email addresses to receive the itinerary. The email addresses in the traveler's profile will already receive the itinerary information. This is only to add additional recipients. If multiple email addresses are entered, separate them with a comma.

3. If a hotel is booked through Concur, there is an option to include directions and/or a map to the hotel with the email confirmation.

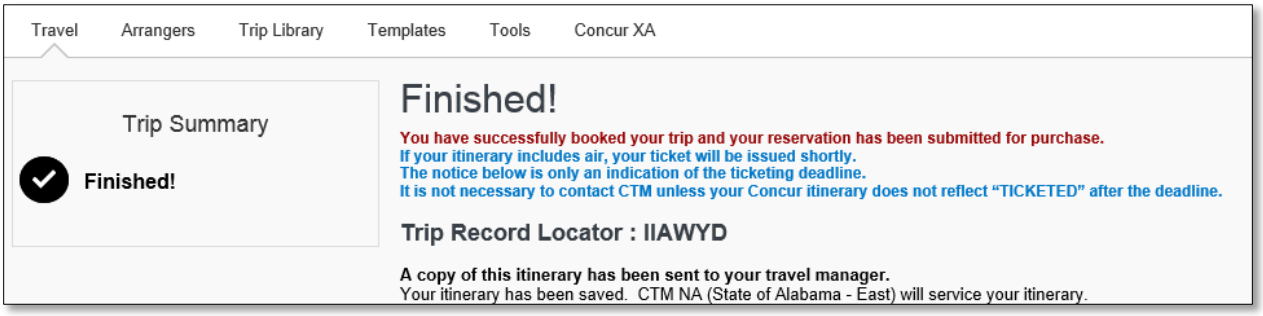
4. The last field on the page is a required field. The 4-digit Request ID from the traveler's approved Request must be keyed in this field before continuing with the booking. If you need assistance with locating the Request ID, please see the ***Creating a Request*** job aid.

5. Once these steps have been completed, you can continue with the booking process by selecting **Next**. If you need to make adjustments, select **Cancel Trip** to start the search process over.



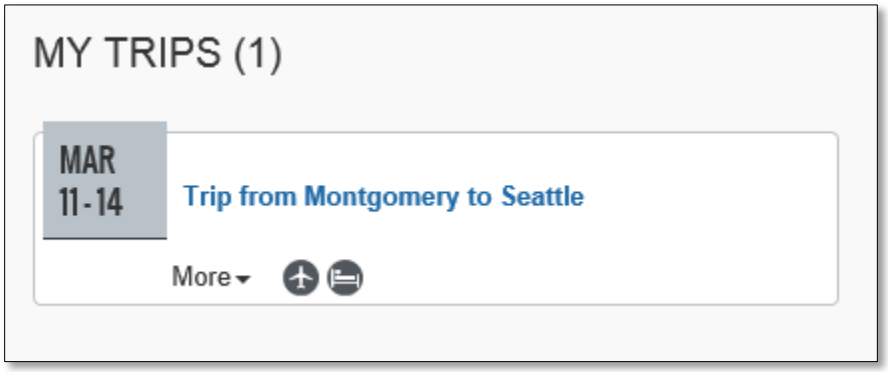
TRIP CONFIRMATION

1. This is the final overview of trip details before tickets are booked/purchased. Review all travel details thoroughly. Seat assignments have been finalized in this step, so if adjustments need to be made, you may do so by selecting the **Previous** button.
2. Once all details have been reviewed, continue with the booking process by selecting **Purchase Tickets**. Once this selection is made, the information is passed along to the travel agency for ticketing/booking. The state agency will be charged an agency booking fee at this time. If you need to make adjustments, select **Cancel Trip** to start the search process over. Once the information has been sent to the travel agency, a cancelled trip will cost the state agency an additional agency booking fee to have the trip cancelled.
3. When the travel information is submitted to the travel agency, you will see this screen appear. This will let you know that you have completed the booking process.

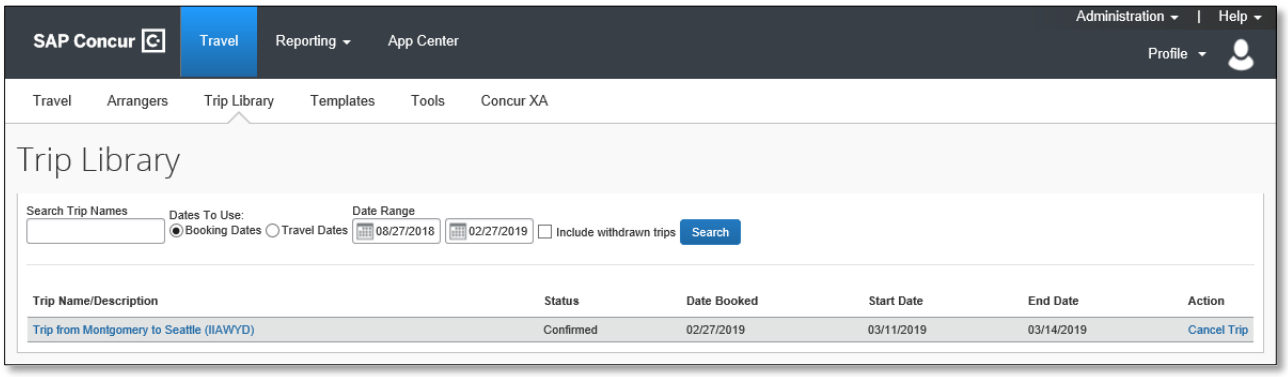


MY TRIPS/TRIP LIBRARY

1. The traveler's upcoming trips will be visible in two places:
    a. Home screen under **My Trips**



b. **Trip Library** – found under the Travel tab on the Home screen



2. The travel can be edited by accessing the trip through the Trip Library.
    a. Under **Action**, you can **Cancel Trip** if necessary.
    b. If you click the **Trip Name**, you will be directed to the itinerary details. You can cancel individual segments of the trip or add items, such as a Rental Car or Hotel. If additions are made via this process, the traveler will not be charged an additional agency booking fee.

CANCELING A FLIGHT, HOTEL OR CAR BOOKING

If your travel plans change and a cancellation to all or a portion of your travel arrangements is necessary, the following steps must be taken:

- Access the trip under your TRIP LIBRARY in the Travel module.
- The entire trip can be canceled by selecting **Cancel Trip** under the Action column.
- If a portion of the trip needs to be canceled/edited, click on the **Trip Name** to view the itinerary details. From here you can make changes as necessary.

Since the purchase of an airline ticket is an immediate charge to your state travel card, the card expense will still need to be paid. Reference the ***Paying the AL VISA in Advance*** job aid to assist in the process. If the flight is canceled properly through Concur, the air carrier will have a credit on file to apply to a future flight.

CREATING AN EXPENSE TO PAY FOR ADVANCE CHARGES ON TRAVEL CARD

The Expense module will allow for advance charges booked through the Travel module or directly to the State's travel card to be expensed when the charge from the travel card has imported into your Concur profile from the bank. This will be important to do in order to keep the travel card from incurring interest charges on trips booked well in advance of the travel dates. Please see ***Paying the AL VISA in Advance*** for assistance with this process.