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Travel Booking

The CSU has contracted with Christopherson Business Travel as our dedicated Travel Management Company. It is highly encouraged that travel segments (air, car rental, hotel) are booked in Concur to gain leverage in terms of contracted rates, consolidate spend systemwide, maintain compliant travel, and obtain travel related data that can assist with campus decision making process.

Travel must be approved before travel segments are booked in Concur.

The traveler will receive a system generated email alerting them when a request is approved. This is the traveler's cue to login to Concur and book transportation and lodging reservations as needed and approved for a given trip.

Once logged in, travel can be booked using the "Trip Search" section of the dashboard or by selecting the Travel menu and using the Trip Search functionality there.

The screenshot shows the SAP Concur dashboard for a user named Melissa. The 'Travel' menu is highlighted in the top navigation bar. Below the navigation bar, there are several summary cards: 'New' (00), 'Required Approvals' (01), 'Authorization Requests' (01), 'Available Expenses' (00), and 'Open Reports' (01). The main content area is divided into three sections: 'TRIP SEARCH', 'COMPANY NOTES', and 'MY TASKS'. The 'TRIP SEARCH' section is highlighted with a blue box and contains a 'Mixed Flight/Train Search' form with fields for 'From' and 'To' and buttons for 'Find an airport' and 'Select multiple airports'. The 'COMPANY NOTES' section contains an important message: '***DON'T BOOK TRAVEL UNTIL YOUR REQUEST IS APPROVED. If you're booking in Concur, use Trip Search or the Travel tab.' and a welcome message: 'Welcome to Concur Travel, the corporate online travel tool for California State University'. The 'MY TASKS' section is currently empty.

Reservations can be made separately as trip details are finalized. For example, a flight can be booked once the trip is approved and a hotel can be booked later if a conference block full, or a rental car can be booked if needed before a trip occurs.

Please note, if you choose to utilize the services of Christopherson Business Travel, take note of your request ID before calling to ask for assistance with booking reservations. The request ID can be located by opening the request associated with the trip. Open the request, select **Request Details** then **Request Header**.


The screenshot shows the 'Request Example' page in SAP Concur. The page title is 'Request Example \$823.50' and it is marked as 'Approved | Request ID: 4GGJ'. There are buttons for 'More Actions' and 'Create Expense Report'. Below the title, there are links for 'Request Details', 'Print/Share', and 'Attachments'. The 'Request Details' link is highlighted with a red box. Below this, there is a table with the following columns: 'Request', 'EXPENSES', 'Details', 'Date', 'Amount', and 'Requested'. The table contains one row of data:

Request	EXPENSES	Details	Date	Amount	Requested
Request Header		Los Angeles, California	11/04/2020	\$425.00	\$425.00

Note the Request ID for the related trip.


The screenshot shows the 'Edit Request Header' form in SAP Concur. The 'Request Id' field is highlighted with a red box and contains the value '4GGJ'. Other fields include 'Request/Trip Name' (Request Example), 'Trip Type' (1-In-State), and 'Travel Start Date'. The form also has 'Cancel' and 'Save' buttons.

Booking a Flight

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

The screenshot shows the 'Flight Search' form. It includes tabs for 'Round Trip', 'One Way', and 'Multi City'. The 'From' field is labeled 'Departure city, airport or train station' and the 'To' field is labeled 'Arrival city, airport or train station'. There are links for 'Find an airport' and 'Select multiple airports'.

Start the Search

1. Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi City
2. In the **Departure City** and **Arrival City** fields, enter the cities for your travel. When you enter a city, airport name, or airport code, SAP 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:

- The graphical display is based on flight schedule data. It will not show any rail options, nor can it take refundability or class of service preferences into account.
 - Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all of the flights available for that time slot.
 - If you change locations or dates, click **refresh graph** for more data.
5. For **Search flights by**, select either **Price** or **Schedule**.

Search by
 Schedule ▾

Refundable only air fares
 Flights w/ no double connections

Search

6. To search only for refundable flights, click the **Refundable only air fares** check box.
7. If necessary, uncheck the **Flight w/ no double connections** check box.
8. Click **Search**.

Select a flight

1. On the **Flight Search** results page:
 - If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
 - If you selected **Schedule** on the previous page, then the **Depart** tab is initially active.

In the following example, **Price** was selected on the previous page.

The screenshot shows the SAP Concur Travel interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel' (active), 'Expense', 'Invoice', 'Approvals', and 'App Center'. The main content area is titled 'SEATTLE, WA TO ATLANTA, GA MON, MAY 28 - THU, MAY 31'. It features a 'Trip Summary' sidebar on the left with 'Select Flights' and 'Finalize Trip' options. The main area displays a table of flight options with columns for 'All', 'spirit', 'jetBlue', 'American Airlines', 'United', 'Alaska Airlines', and 'Delta'. Below the table, there are tabs for 'Shop by Fares' (active) and 'Shop by Schedule'. A search bar and a 'Sorted By: Price - Low to High' dropdown are visible. The results show '10:55a SEA→09:08p ATL 1 stop 7h 13m'.

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.

The screenshot shows the 'Selected Fare' section. It displays the American Airlines logo and flight details: '06:05a SEA→04:07p ATL 1 stop DFW 7h 02m' and '12:24p ATL→05:42p SEA 1 stop CLT 8h 18m'. A blue button with the price '\$1,026.10' is highlighted with a red box. A 'Remove' button with a red 'x' is also visible. A 'Show all details' dropdown arrow is at the bottom right.

4. On the **Review and Reserve Flight** page, review the flight details for your trip.
5. 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 can click the **View seats map** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**.

Seat Map (View Only)

Available flights
AA 1332 SEA-DFW Close

If available, seat selection is presented after you have chosen a flight.

American #1332, Boeing 737-800, Seattle Tacoma Intl Arpt (SEA) - Dallas Ft Worth Intl (DFW)
Seat assignment is subject to change up until time of departure

Available
 Occupied or Unavailable
 Selected
 Exit row
 No seating ⓘ

Preferential ⓘ
 Preferential

Paid preferential ⓘ
 Paid preferential

6. Click **Reserve Flight and Continue**. If you had entered other segments on your travel request you will be prompted to complete those reservations as referenced in the Booking a Car or Booking a Hotel section. If only booking flight will finalize transaction by purchasing the ticket.
7. If you need to book hotel or car rental, choose the related icon and enter reservation details. If only need to book flight follow final steps below.

Purchase the ticket

1. Click **Confirm Booking** to send your request to your travel agent and to your manager for approval.
2. Click **Finish**.
The **Finished!** screen shows your confirmation number and information to contact the travel agent.
3. Click **Return to Travel Center**.

Booking a Car

Note: the CSU has a contract with Enterprise/National and travelers are required to use these two carriers for all rental car needs. Exceptions are only made if either carrier are not available at a destination or car inventory cannot accommodate a request.

Search for your Car



Most of the items below will feed over from the data entered at the time the travel request was populated.

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.
4. 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.
3. To see additional search preferences, click **More Search Options**.
4. Select the **Car Type**.
Tip: Hold the Ctrl key to select more than one type.
5. Select all of your preferences, and then click **Search**.

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.
 - Preferred vendors will show in the left column.
 - 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.

Sort the results

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

Review the results

Trip Summary

Select a Car

Pick-up: Sun, 05/27/2018
SEA - Terminal

Drop-off: Wed, 05/30/2018
ATL - Terminal

Finalize Trip

PICK UP: (SEA) ON SUN, MAY 27 12:00 PM
DROP OFF: (ATL) ON WED, MAY 30 12:00 PM

Show as USD

[Hide matrix](#) [Print / Email](#)

All	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car
20 results						
AVIS	198.98	203.99	210.99	216.99	216.99	228.99
Most Preferred						
	195.00	195.00	211.25	227.50	243.75	260.00
	195.00	195.00	211.25	227.50	243.75	258.64
	020 NO RATES AVAILABLE FOR ONE WAY #ZR#					
	020 UNABLE TO PRICE - NO RATE QUALIFIES #ZE#					

Sorted By: Policy - Most Compliant

Displaying: 20 out of 20 results. [Previous](#) [1](#) [2](#) [Next](#) | [All](#)

AVIS **Economy Car - \$198.98 per day**
(Worldspan)

Automatic transmission
Unlimited miles, Pick-up: Terminal: SEA
Adults: 2, Children: 2, Large bags: 1, Small bags: 1

Total cost*
\$806.56

Most Preferred Car Vendor for Learning Services Demo / E-Receipt Enabled [?](#) [Location details](#)

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.

Select the rental car

1. Click the **Total cost** button.
Note that the color of the **Total cost** button reflects policy compliance.
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**.

Booking a Hotel

Search for a Hotel

Most of the items below will feed over from the data entered at the time the travel request was populated.

1. Enter the **Check-in** and **Check-out Dates** (or click in the fields to use the calendar).
2. Enter the search radius.
3. Choose to search near an **Airport, Address, Company Location, or Reference point / Zip Code**, and then enter the appropriate information in the available fields.
4. 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.
5. Click **Search**.

Change and filter search

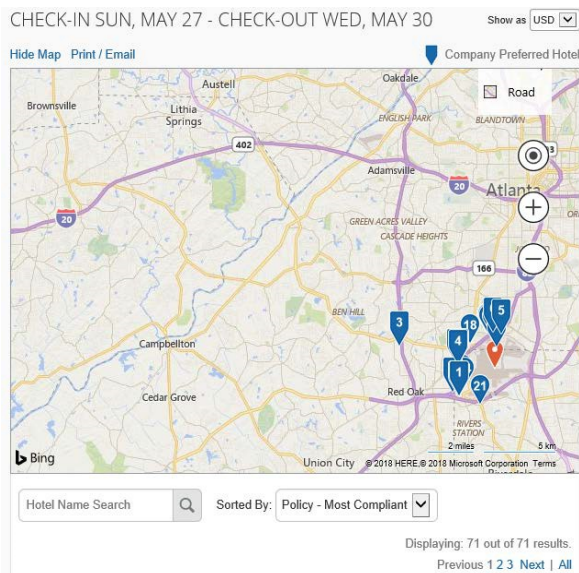
1. In the **Change search** area:
 - Change your check-in and check-out dates, and your hotel location.
 - Click **Search**.

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.

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.

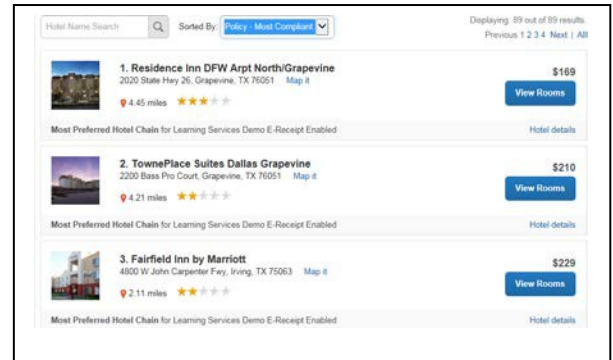
Sort the search results (as needed)

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

Review the results

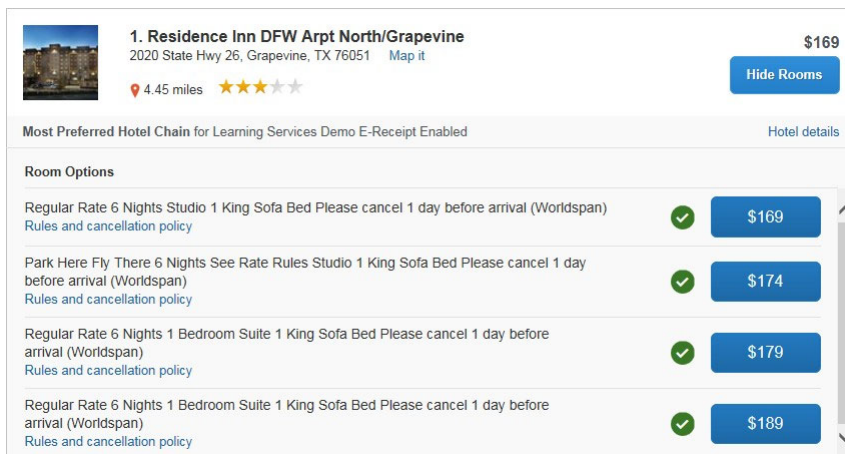
A picture as well as the name, address, rating stars, and price range appears.

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



Select the hotel room

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



Only select state rates if noted, not governmental that will require Federal credentials.

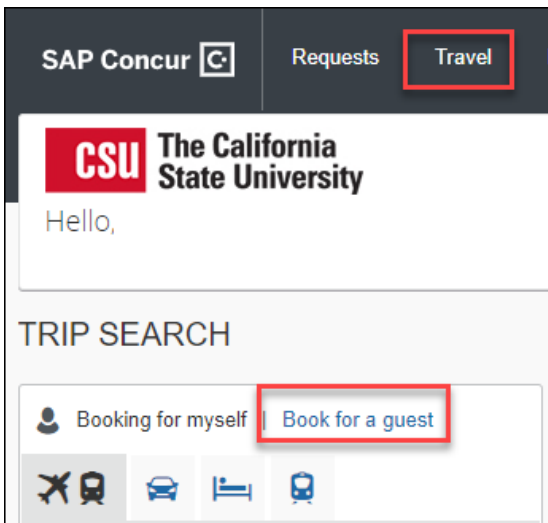
The **Review and Reserve Hotel** page appears. Navigate through the page and:

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

Booking for a Non-Employee (Guest)

There may be a situation where a department administrative person is performing the task of booking travel on behalf of a student or guest (i.e. interviewee) traveling for the University. There is a specific access that needs to be granted to this user; please contact Accounts Payable if this need occurs. Once access is determined to be necessary the following steps can be taken to make arrangements on behalf of the non-employee.

Log in to Concur and select **Book for a guest** hyperlink. This step is critical as you will be entering their information on reservations instead of your own.



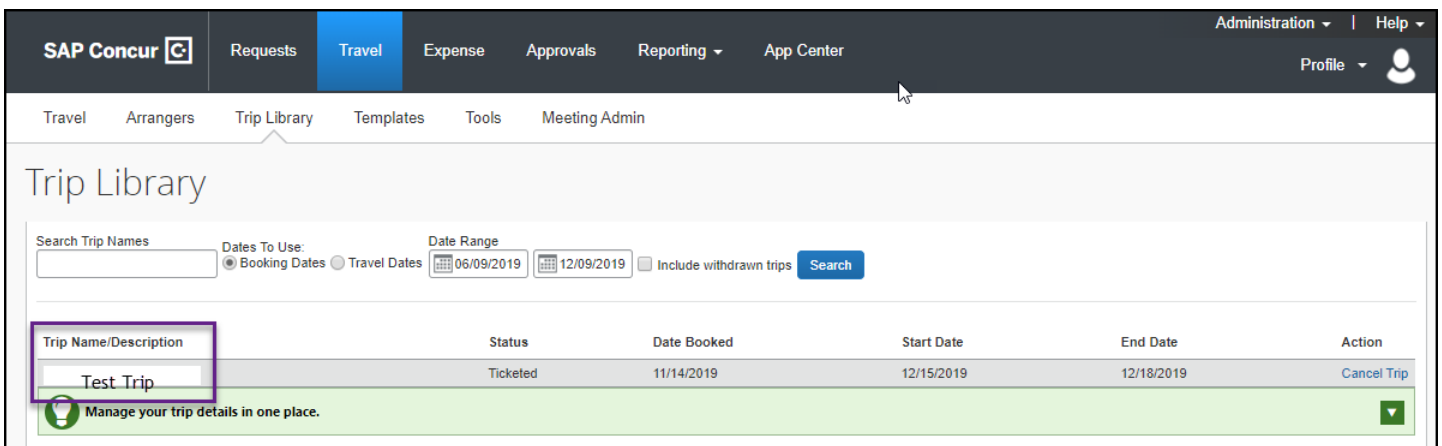
Ensure that any reservations booked reflect the individuals name. In order to book flights, you will need to have their legal name, DOB, gender that ties to the identification they will use to board a flight. Entering this information accurately is critical.

Review Travel Itinerary/Trip Details

Trip details can be reviewed at a later date as needed or in the case where reservations need to be cancelled.

Review Itinerary

Navigate to the Travel menu, select Trip Library and open the trip itinerary that you want to review.



Reservation details will be displayed in a separate window.

RESERVATIONS

Monday, May 13, 2019

Flight Sacramento, CA (SMF) to Santa Ana, CA (SNA)

Southwest 1340

Departure: 03:40 PM
 Seat: **No seat assignment**
 Sacramento Intl Airport (SMF)
 Duration: 1 hour, 30 minutes
 Nonstop

Confirmation: Q6ZOVK
 Status: Booked directly in Southwest /Q6ZOVK
 Air Frequent Flyer Number: WN-20183034253

Arrival: 05:10 PM
 Santa Ana Airport (SNA)

Additional Details
 Distance: 404 miles
 E-Ticket
 Emissions: 265.3 lbs CO₂
 Cabin: Wanna Get Away (A)

Dining Reservation at: True Food Kitchen Newport Beach, CA

Time: Mon May 13
 6:00 PM
 Vendor: ZZ

Confirmation:
 Status: Confirmed

Thursday, May 16, 2019

Flight Santa Ana, CA (SNA) to Sacramento, CA (SMF)

Southwest 1159

Departure: 04:55 PM
 Seat: **No seat assignment**
 Santa Ana Airport (SNA)
 Duration: 1 hour, 30 minutes
 Nonstop

Confirmation: Q6ZOVK
 Status: Booked directly in Southwest /Q6ZOVK
 Air Frequent Flyer Number: WN-20183034253

Cancel Reservation

This step can be done by traveler or delegate. The entire trip can be canceled or certain segments can be canceled as needed.

Select the **Travel** tab, then select **Trip Library**. Select “Cancel Trip” hyperlink for the appropriate trip. Follow prompts to fully cancel reservations and close the travel element of the previously booked trip.

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Travel' (selected), and 'Administration'. Below this is a secondary navigation bar with 'Travel', 'Trip Library' (selected), 'Templates', 'Tools', and 'Meeting Admin'. The main content area is titled 'Trip Library' and contains a search section with 'Search Trip Names', 'Dates To Use' (Booking Dates selected), 'Date Range' (02/15/2019 to 08/15/2019), and an 'Include withdrawn trips' checkbox. Below the search section is a table with the following columns: Trip Name/Description, Status, Date Booked, Start Date, End Date, and Action. The 'Action' column contains 'Cancel Trip' links for each row. The first 'Cancel Trip' link is highlighted with a red box.

Trip Name/Description	Status	Date Booked	Start Date	End Date	Action
	Confirmed	02/24/2019	10/13/2019	10/17/2019	Cancel Trip
	Confirmed	02/23/2019	09/15/2019	09/19/2019	Cancel Trip
	Ticketed	02/23/2019	08/17/2019	08/22/2019	Cancel Trip
	Confirmed	02/23/2019	07/14/2019	07/18/2019	
	Confirmed	02/23/2019	06/09/2019	06/13/2019	

Change Reservation

There may be a need to alter reservations previously booked in Concur. Open the particular trip to see itinerary.

The screenshot shows the SAP Concur interface. At the top, there are navigation tabs: Requests, Travel (selected), Expense, Approvals, Reporting, and App Center. Below these are sub-tabs: Travel, Arrangers, Trip Library (selected), Templates, Tools, and Meeting Admin. The main content area is titled 'Trip Library' and includes a search bar with fields for 'Search Trip Names', 'Dates To Use' (Booking Dates selected, Travel Dates unselected), 'Date Range' (06/09/2019 to 12/09/2019), and an 'Include withdrawn trips' checkbox. A 'Search' button is present. Below the search bar is a table with the following data:

Trip Name/Description	Status	Date Booked	Start Date	End Date	Action
Test Trip	Ticketed	11/14/2019	12/15/2019	12/18/2019	Cancel Trip

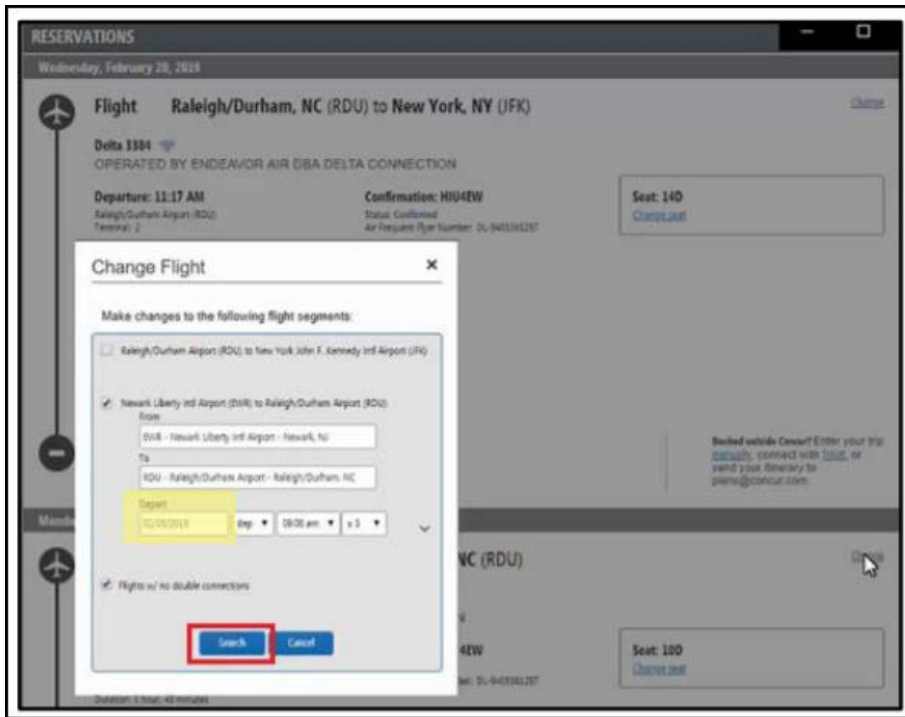
Below the table is a green bar with the text 'Manage your trip details in one place.' and a dropdown arrow on the right.

Select the Change hyperlink (on the right hand side near the segment) and alter as needed.

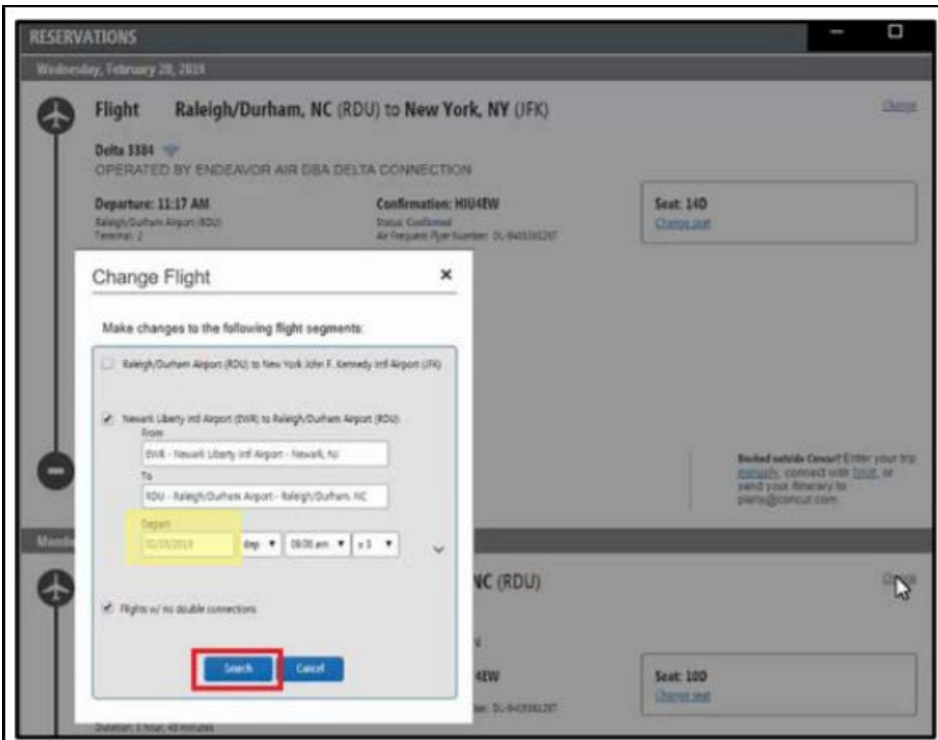
Example of changing a previously booked flight.

The screenshot shows the SAP Concur RESERVATIONS interface. It displays two flight segments. The first segment is for Wednesday, February 28, 2018, with flight Delta 1384 from Raleigh/Durham, NC (RDU) to New York, NY (JFK). The second segment is for Monday, February 25, 2018, with flight Delta 6199 from Newark, NJ (EWR) to Raleigh/Durham, NC (RDU). A blue callout box with a right-pointing arrow and the text 'Click Change.' is overlaid on the second flight's details.

Changing departure date should flow through to other reservations (i.e. car or hotel booked for the trip, which can be overwritten if needed)



Flight information will be summarized to show the difference between previous reservation and new reservation.



If changing carriers you will need to cancel the previously booked flight and reserve a new flight with an alternate carrier.