

# SAP Concur Travel: Book Airfare and Lodging

Use this guide to help you make airfare and lodging reservations via Concur Travel.

**Accounts Payable & Travel** 

Revised January 2025

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## Overview

The SAP Concur Travel online booking tool delivers the broadest selection of travel content through an intuitive and easy-to-use online travel booking experience. Both the SAP Concur Travel and SAP Concur Expense modules allow for travel to be all inclusive for employees, students, and non-employees of Texas State University. This also allows for an all-encompassing system for travel preapproval, booking travel reservations and the reimbursement process once the trip is complete.

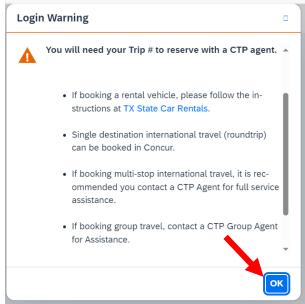
The following instructions will guide the user through the reservation process of airfare, lodging and in some cases car rental (if booking car rental only, refer to <u>Tx State Car Rentals</u>).

Corporate Travel Planners (CTP) is the University's preferred vendor for airfare and lodging purchases. When booking your reservations, the SAP Concur Travel system will submit all reservation information to CTP for final ticketing, reservation, and invoicing. CTP will then transfer booking information to the SAP Concur Expense system; this allows for ease of the reimbursement process once your trip is complete.

If you need on-line navigational assistance at any time during the booking process, you may call Corporate Travel Planners (CTP) toll free at 877-727-5188. Operational times for this free service is 8:00 AM – 5:00 PM M-F Central Time. **NOTE:** If you need help after hours, you may still call 800-823-6582 but you will incur an after-hours booking fee.

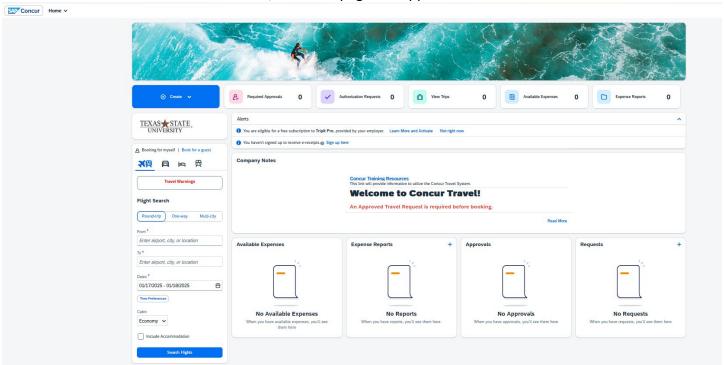
## **Pre-Booking Requirements**

- Travel Requests must be fully approved before airfare/hotel/rental vehicles can be booked.
- Only valid and correct trip numbers should be used when making reservations (e.g., 334P).
- Travel Requests should have sufficient funds encumbered to cover the costs.
- Reservation dates must match the approved Travel Request.
- Destinations must match the approved Travel Request.
- Travel Assistants should not book any airfare other than coach. Please refer to RSS 072618A.
  - ➤ The following Login Warning will pop up. Read through for University guidelines and SAP Concur directions and select **OK**. **NOTE:** This message will change with any updated information.

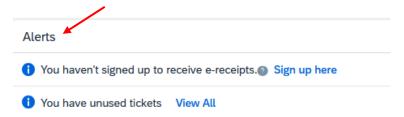


## SAP CONCUR TRAVEL Homepage Overview

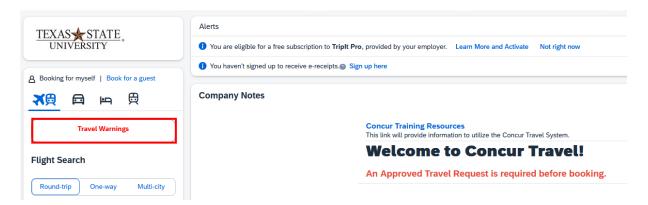
1. Once in SAP Concur Travel, the homepage will appear.



2. Any unused tickets will be listed under the Alerts tab.



3. It is the Traveler's responsibility to monitor any travel warnings when traveling to a foreign country. Click the **Travel Warnings** box to view notifications.



4. The **Company Notes** section includes Travel Office resources and information about ConfermaPay, On Call International the University's duty of care provider, Concur contact information, CTP contacts and Travel Office quick links.

## **COMPANY NOTES**

#### Concur Training Resources

This link will provide information to utilize the Concur Travel System.

## Welcome to Concur Travel!

## An Approved Travel Request is required before booking.

#### Before your trip begins

- Know your travel allowances: Business Travel UPPS 05.06.05
- · Access any Texas State Travel Forms needed.
- · Review the Pre-Trip Reference guide.

#### Corporate Travel Planners (CTP)

The University's preferred vendor for airfare and lodging reservations.

- · CTP Hours of Operation: 8:00am 5:00pm CST
- · CTP After Hours: 5:01pm 7:59am CST

#### **Hotel Payment**

- · If booking hotels in Texas, provide the Hotel Occupancy Tax Exemption Certificate to the establishment.
- · Access your virtual hotel payment with the ConfermaPay App.
  - · Register with your university email.
  - For ConfermaPay App troubleshooting, please email: https://help.conferma.com

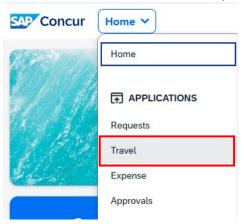
#### Car Rentals

· If booking a rental vehicle ONLY, please follow the instructions at TX State Car Rentals.

#### Concur Reservation Assistance

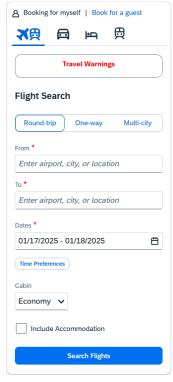
- For Concur Travel Assistance please call 877-208-1396 . .
- For Full Service Reservation Assistance please call 800-523-9036 · or 210-366-9565 · .
- For Assistance with Group Reservations please call 800-810-2695 · or 210-530-0857 · , or you can email groups@ctptravelservices.com.
- After Hours Toll Free Number 800-823-6582 .
  - Please note there is a charge for after hour calls.

5. Select **Travel** from the dropdown menu on the top left of the homepage.

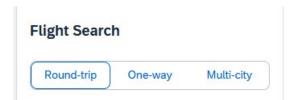


# **Booking Reservations**

1. Determine what combination of travel is required (e.g., airfare, rental car, lodging, or rail)



2. Under TRIP SEARCH, select one of the following options: Round Trip, One Way, or Multi City.



3. If only booking one travel type, select the proper icon (e.g., plane, car, bed, or train) to begin the booking process for the type of travel needed.

**NOTE:** If booking car rental only, refer to <u>Tx State Car Rentals</u>. **Rentals booked through Concur** will be personally paid by the traveler.

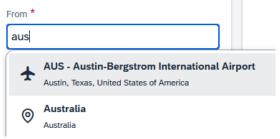


4. If booking airfare plus rental vehicle and/or lodging, click the plane icon and you will be prompted to book a rental vehicle and/or lodging as you flow through the booking process. There is no need to return to the initial screen to begin each individual reservation.

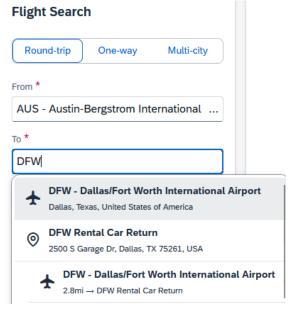
# Booking Airfare and Lodging

### Airfare

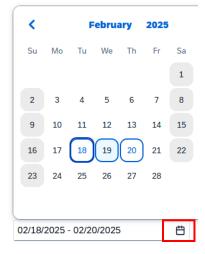
1. Enter Departure City. Beginning with the city name or airport's three-digit code and a listing will begin to populate to narrow the search. Scroll down the list and click on the correct airport.



2. Enter Arrival City. Beginning with the city name or the airport's three- digit code and a listing will begin to populate to narrow the search. Scroll down the list and click on the correct airport.



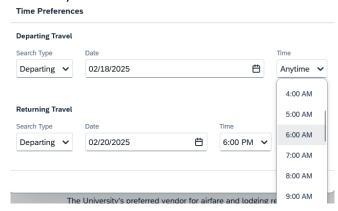
- 3. Enter the dates of travel to search for reservation availability.
  - a. Enter the date or select from calendar drop down.



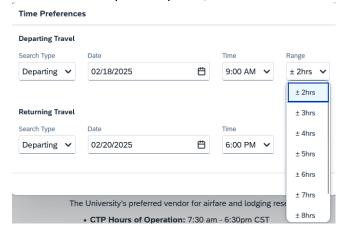
4. Select Time Preferences to narrow down the search. Enter the Departure and Return times.



a. The time preference can be changed to either departure or arrival (e.g., want to arrive at 12:00PM).



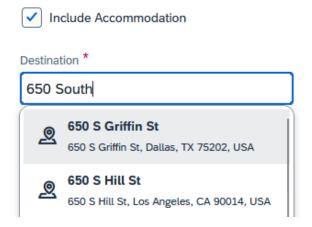
b. Select to view options up to +/- 9 hours from the time selected.



5. Check the Include Accommodation box to Find a Hotel in the Destination location to reserve lodging.



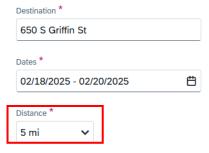
6. For lodging, enter the Destination City or Location.



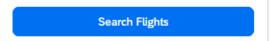
a. Ensure the dates of stay are correct.



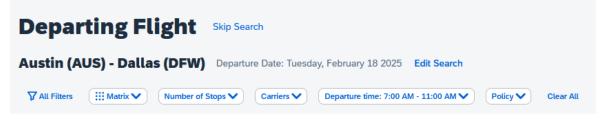
b. Select the Distance from the Destination to search for hotels in the area.



- c. Company Location Note: If seeking to direct bill a hotel in the San Marcos or Round Rock area please see Company Billed Hotels.
- d. Select Search Flights.



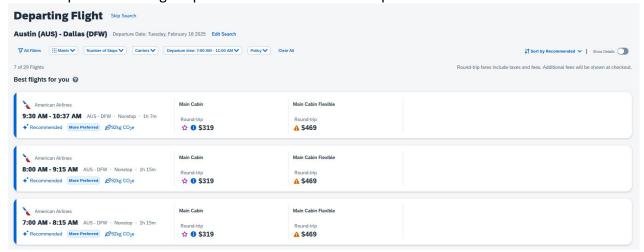
- 7. The system will take a moment to load the flight selections.
- 8. Flight results can be filtered by using a Matrix, Number of Stops, Carrier (Airline), and Departure time.



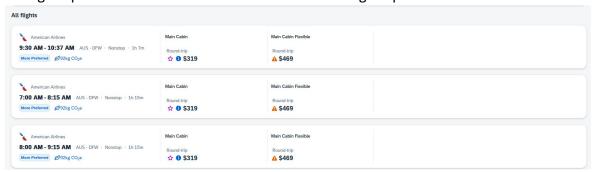
- a. The Matrix will show you the total results by airline and the number of stops.
  - i. Users can select the results from the matrix results.



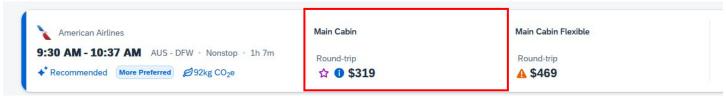
- 9. Flight options and prices will be displayed based on the selected preferences. Review the grid and select the **Departure** flight. Click **Select** to choose the preferred departure flight.
  - a. The top section of flight options are recommended on preferences.



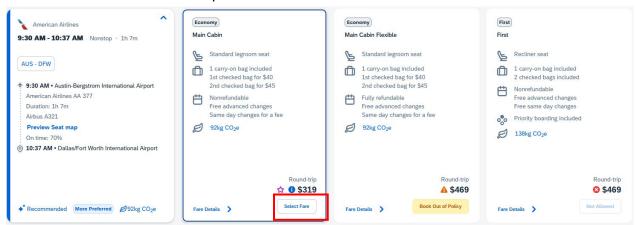
b. All flight options are listed below the recommended flight options.



10. Select the preferred **Departure** flight and **Fare Class** (example: Main Cabin) from the listing.



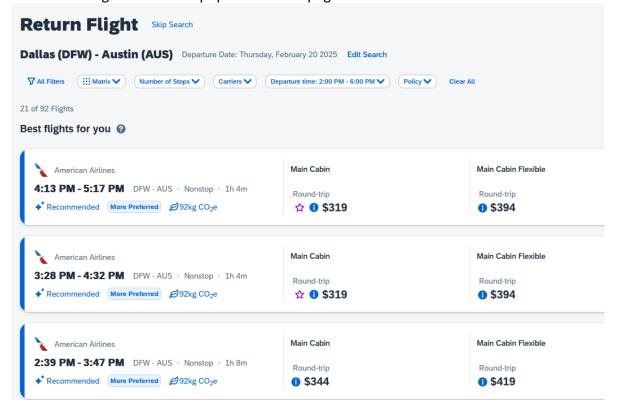
11. Select the fare from the listed options.



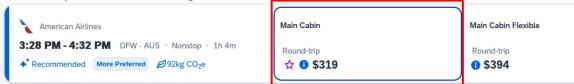
12. The **Departure Flight** will populate at the top of the page.



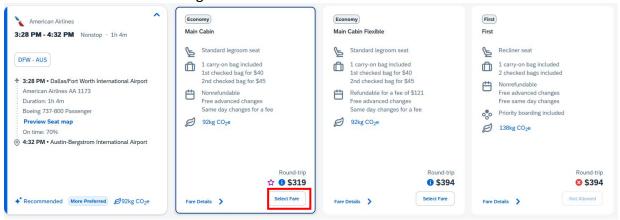
13. The Return Flight results will populate on the page for selection.



14. Select the preferred return flight.



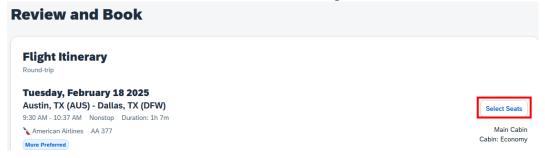
15. Select the fare class for the flight.



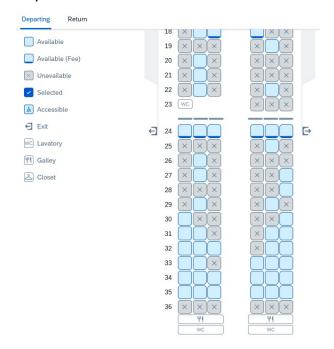
16. Once roundtrip flight selection is complete, the flight itinerary will populate for review.



17. Users can Select Seats within the cabin for each flight.



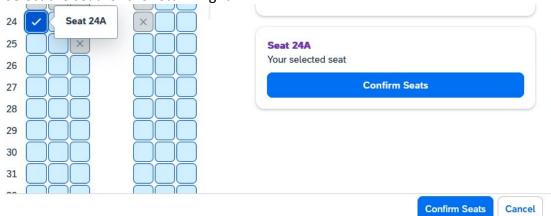
18. Any seats that are available without a fee can be selected.



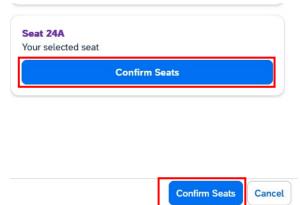
a. Once the seat has been selected, select **Next Flight**.



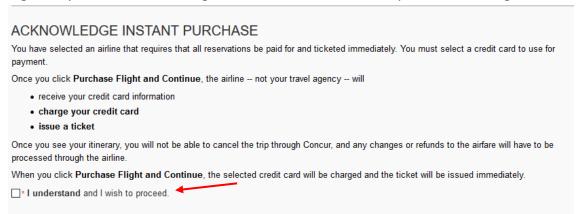
b. Select the seat for the return flight.



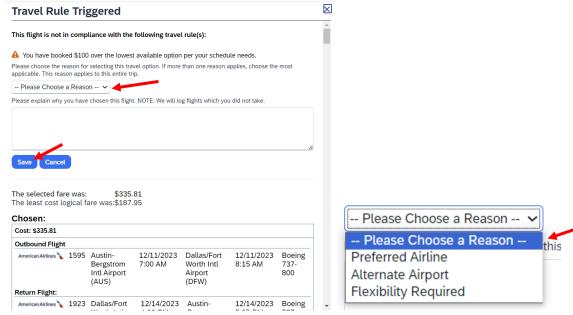
c. Select Confirm Seats.



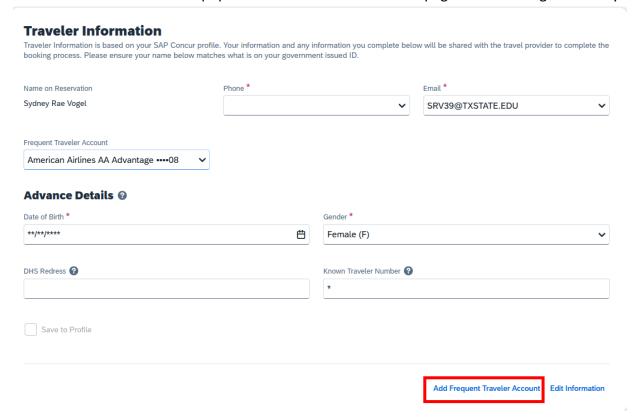
**NOTE:** Select airlines such as Frontier offer "instant purchase airfares." If this option is used, the ticket purchase is instantly processed after acknowledging the instant purchase related to the chosen flight. Any cancellations, changes or refunds will need to be processed through the carrier.



**NOTE:** You will be prompted to "Choose a Reason" when booking airfare \$100.00 or more over the lowest available option. Once you have chosen a reason, select "Save" to continue.

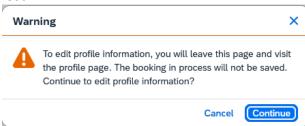


19. Traveler Information will populate on the Review and Book page under the flight itinerary.

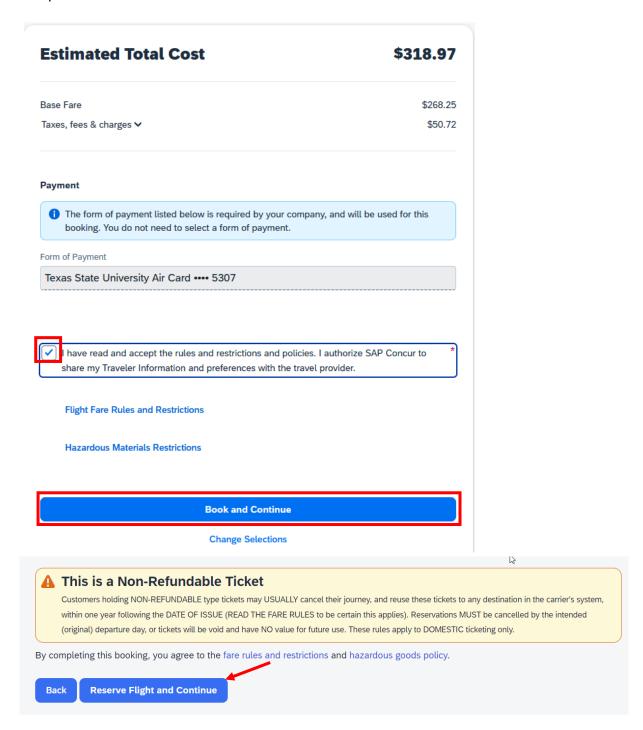


## **NOTE:**

- If you have a frequent flyer program set-up in Concur, it will either auto-populate, or you will have the option of adding one at this stage of the reservation.
- o If any of the Traveler's information needs to be updated, please select Edit Information.
  - Be advised that this will take the user into profile settings and the reservation will be lost.



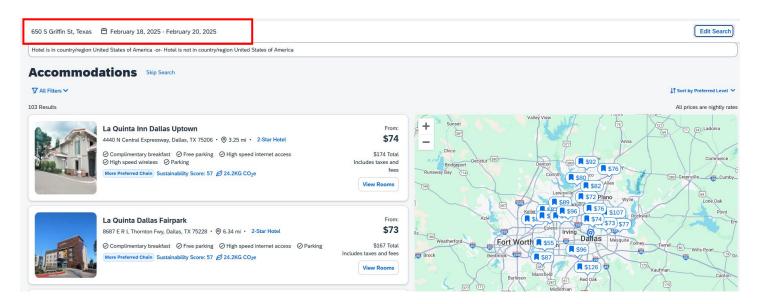
a. After reviewing all details, mark the box "I have read and accept the rules and restrictions and policies. **Select Book and Continue.** 



## Lodging

1. Search results for accommodations based on the location that were entered during the search will populate for review.

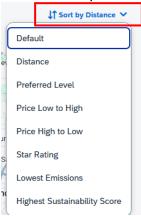
**NOTE:** This process is for **business lodging only**. If extending travel for personal days, book the personal lodging reservation separately and use a personal credit card to reserve the room.



2. Lodging results can be filtered by Hotel Name by selecting **All Filters** on the left-hand side of the page.

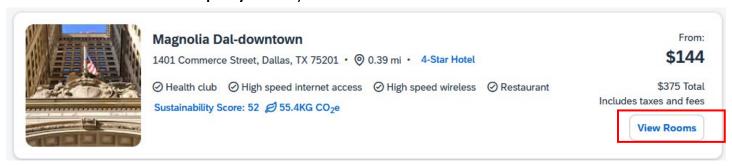
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a. The results may also be sorted by Distance or Price on the right-hand side of the booking page.

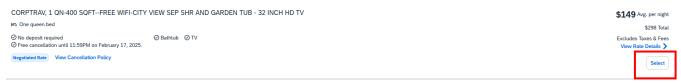


3. Locate the hotel to book. Click on **View Rooms** and then select the room type to move forward with booking. A grid of available room types will be displayed.

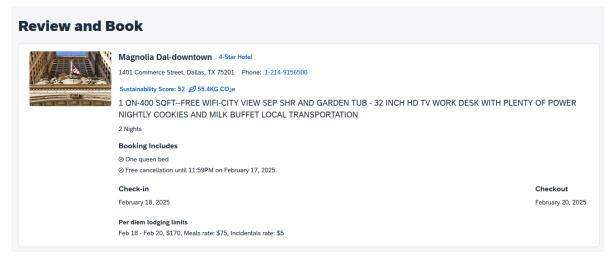
**NOTE:** If the hotel requires a deposit to hold the room, verify you need to stay at that hotel or if you can book another hotel. Some hotels do not refund deposits if the reservation is cancelled. Click on **Rules and cancellation policy** to verify.



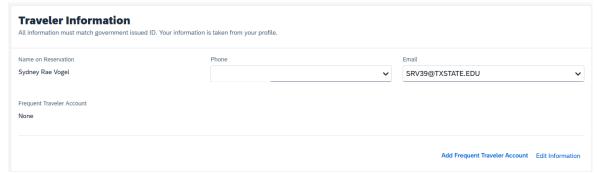
4. **Select** the room that should be reserved.



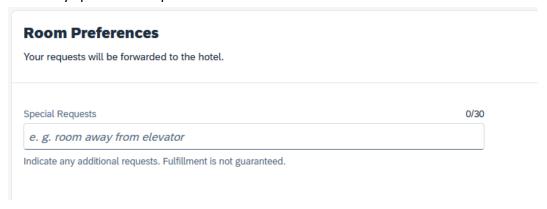
5. Review the hotel reservation.



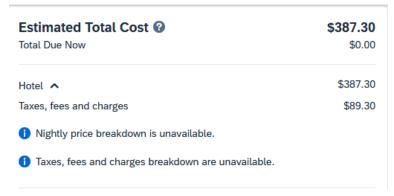
6. Review the Traveler Information.



7. Enter any special room preferences.

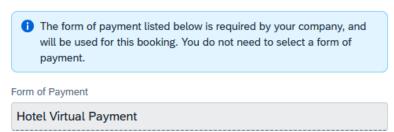


8. Estimated Total Cost will be available on the right-hand side of the page.

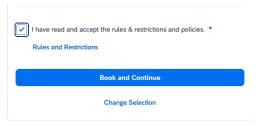


9. Form of Payment will default to Hotel Virtual Payment.

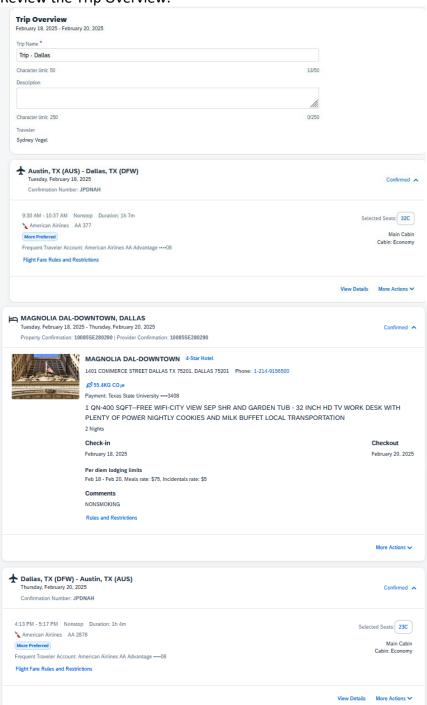
### **Payment**



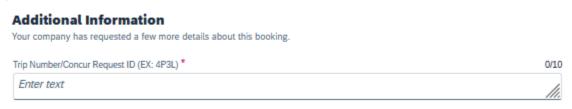
10. Review the details and cancellation policy. Check the box next to I have read and accept the rules & restrictions and policies. Select Book and Continue.



11. Review the Trip Overview.



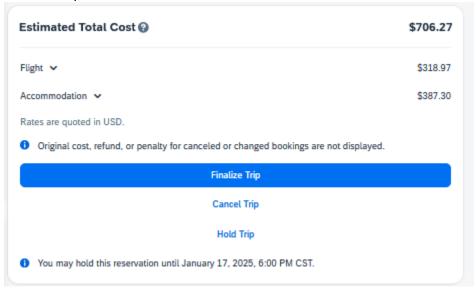
- 12. If satisfied with the trip details, then please add **Additional Information**.
  - a. Enter the Approved Concur Travel Request ID.



b. Select if there is an unused ticket to apply to the reservation.

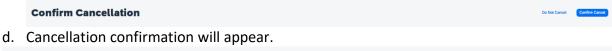


13. Finalize Trip if all details have been reviewed.



## **Trip Confirmation**

- a. Click on the blue **Purchase Ticket** button to complete the purchase of your airfare and reserve rental vehicle and/or lodging if applicable.
  - NOTE: Rental vehicles booked through Concur will be personally paid by the traveler.
- b. If not satisfied, then click the blue **Cancel Trip** button to cancel the entire trip (all reservations).
- c. Confirm cancellation by clicking **Confirm Cancel**.



Your cancellation request was received and is currently being processed. An email confirming the cancellation will be sent once done.

## **Trip Overview**

- The trip itinerary will be displayed with the Confirmation Number and will be sent to the email addresses you have indicated. The Travel Office also receives a copy of the itinerary.
- The trip is now confirmed, and these charges will be paid directly by Texas State University.

**NOTE:** Lodging is company billed in a different manner. Lodging will be company paid using a single use virtual credit card specific to the lodging establishment, traveler and the lodging reservation dates (business lodging only). Please refer to the **Hotel Virtual Card FAQs** for more info.

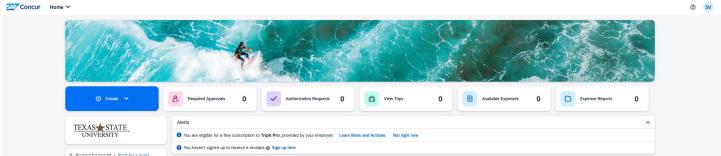
## Multi Segment Travel

Multi Segment Travel encompasses trip reservations with multiple stops along one route. This is mainly seen for a foreign destination. Not all price listings are the same in the booking tool compared to what an agent can book. **NOTE:** Consider using an agent to book these types of trips to ensure you are getting the best price possible, and itineraries are correct.

# Booking on behalf of another Traveler

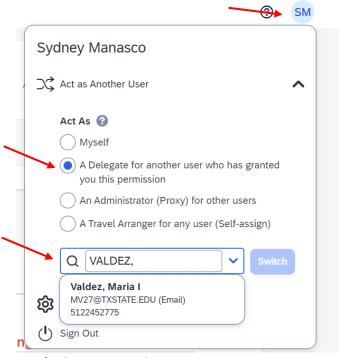
**NOTE:** You must be listed as a Travel Assistant/Arranger in order to book travel for another. Refer to the <u>SAP Concur Travel: Updating your Profile</u> instructions for more information.

1. Once in SAP Concur Travel, the homepage will appear.

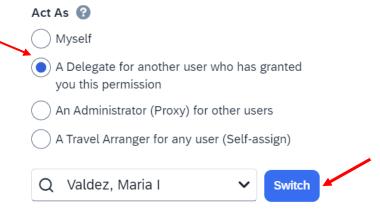


2. From the Profile drop down click on A Delegate for another user who has granted you this permission of another user.

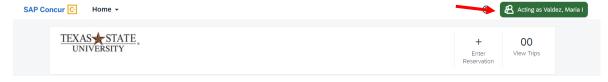
3. Type in the user's name or NetID in search field and select the user confirming the name or NetID.



- 4. Verify the name and NetID are correct.
- 5. Select Switch.



6. Once the profile has been selected, the screen will convert to Acting as (NAME).



7. Refer to <u>SAP CONCUR TRAVEL Homepage</u> to continue with booking procedures.

## Reminders:

- 1. If you have lodging expenses, you will need to verify the lodging expenses on the folio before you leave the hotel.
- 2. Once you return from the trip, you will complete the Expense Report with the company paid charges. An itemized receipt for the transaction will need to be attached.
- 3. If lodging was in the State of Texas, remember that it is the traveler's responsibility to ensure that the State Occupancy Tax was not reflected on folio. If so, you will need to contact the hotel and request a credit to the credit card billed for this tax (you may need to provide the exemption form again per the hotel's request).
- 4. Lodging reservations booked in SAP Concur will be included on your Expense Report, claim these charges as **University Paid**.