

# Quick Start Guide

## Booking Travel with Direct Travel and Concur Online

This Quick Start Guide is designed to walk you through how to update your Travel Profile and start booking travel online or with the Direct Travel team.

*Concur Travel* enables you to

- Reserve, modify or share your air, rail, car or hotel booking online *any time any day*.
- Real-time updates will be shared between Direct Travel Agents and Concur seamlessly
- Boston University travel policy and preferred vendors are automatically highlighted to make it easy to use.

*Travel* is

- Available to the Boston University Community 24x7 with Core Hours from 8am ET to 6p ET Monday thru Friday
- You can speak directly with a BU trained agent at Phone: 617-353-1700 or Email Address: [travelbooking@bu.edu](mailto:travelbooking@bu.edu)

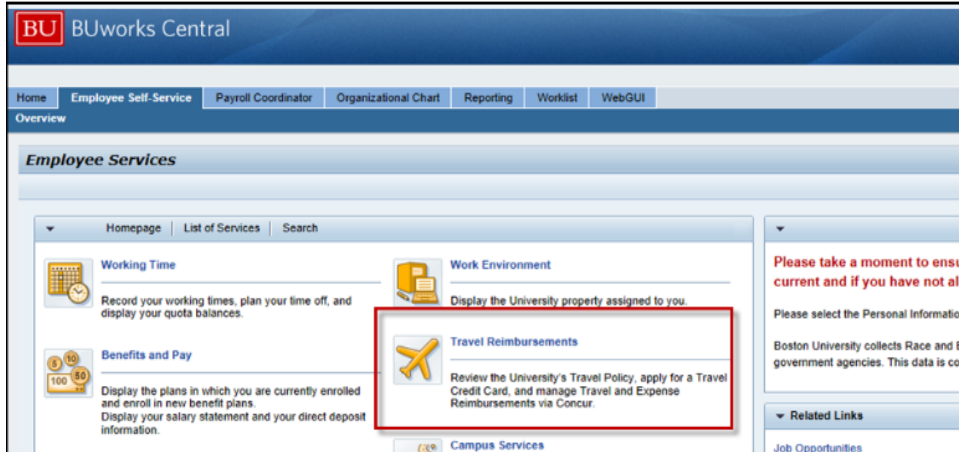
If you encounter any difficulties getting started, please don't hesitate to contact the Travel Services Team at [travelexpense@bu.edu](mailto:travelexpense@bu.edu)

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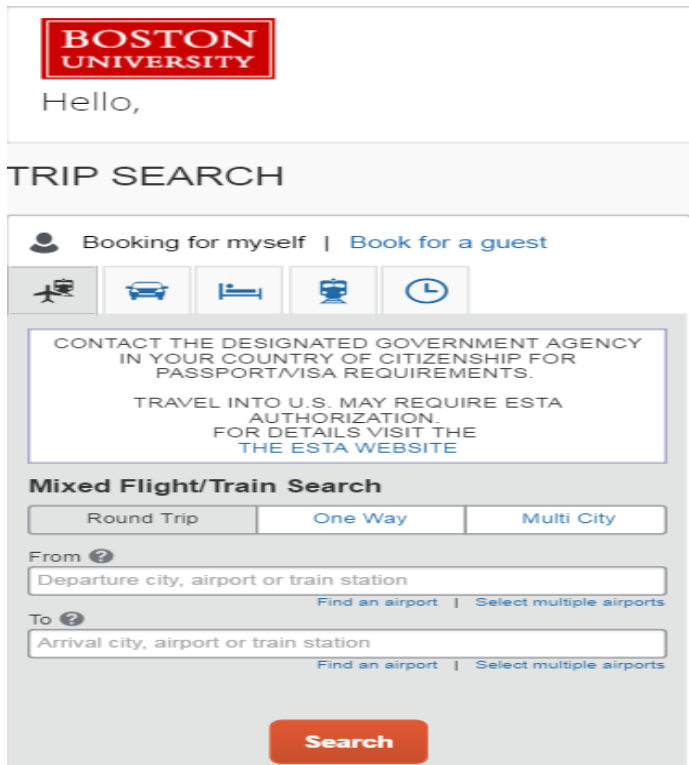
# Section 1: Log on to Concur Travel

1. To get started using Concur Travel, go to: <https://www.bu.edu/buworkscentral>
2. Employee Self Service
3. Travel Reimbursements
4. Manage Business Travel Arrangements and Reimbursements



Once you are logged in successfully, You're ready to get started!

The home page will show features that have been activated for your profile. Take a few moments to familiarize yourself with these options.



## Section 2: Updating Your Travel Profile

1. On the Home Page, select **Profile** in the upper right hand corner of the screen.
2. Select **Profile Settings** to see the menu for Profile Update Options
3. Update the appropriate information, and click **Save**.

### Profile Options

Select one of the following to customize your user profile.

#### Personal Information

Your home address and emergency contact information.

#### Company Information

Your company name and business address or your remote location address.

#### Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

#### E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

#### Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

#### Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

#### Change Password

Change your password.

#### System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

#### Contact Information

How can we contact you about your travel arrangements?

#### Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

#### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

#### Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

#### Company Car

Company Car

#### Mobile Registration

Set up access to Concur on your mobile device

### Note:

- Complete all **required** fields including your legal name on your travel document (Driver's License or Passport), date of birth and gender before saving your profile

## Section 3: Make a Reservation

### Flight Search or Flight, Car and Hotel Combined

1. Select "Booking for myself"
2. Then **Airplane icon** at the top of the page.
3. The type of **Flight Searches are:**
  - *Round Trip*
  - *One Way*
  - *Multi-Segment*
4. Enter the **From and To** with the city name airport code or train station
5. "Find an Airport" will help if you are unfamiliar with the area.
6. Next the calendar will provide dates for **Departure** and **Return** with inventory up to 331 days out
7. And a dropdown will show you the **depart/arrive** option by hour
8. The more hours allowed to search before and after your times (+3 field) the more flight options will be returned.
9. You can also select to reserve a car or see hotel options in the same search or add those later
10. Click **Search**
11. Select your preferred flights by Schedule or Price or modify the search with the toggles on the left or the matrix at the top
12. **Review and Reserve** the flight segments before completing the reservation or adding car and hotel and remember to **Select your Seats**

Note:

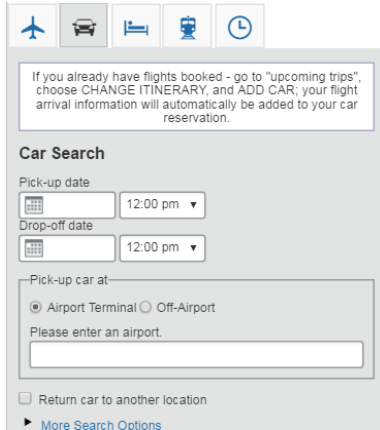
- The **Select** buttons are color coded and reflect BU's travel policy.
  - A *green* Select button indicates the fare is within policy
  - A *yellow* Select button indicates the fare is outside of policy. If you select this fare, you will be asked to provide a reason for booking outside of BU's travel policy
  - A *red* Select button indicates this is out of policy and you will not be allowed to confirm this segment

The screenshot shows a flight search interface. At the top, there are two buttons: "Booking for myself" (selected) and "Book for a guest". Below these are five icons representing different travel options: Airplane, Car, Hotel, Train, and Clock. A message box states: "If you are booking Southwest, remember - there is a brand new process! Be sure to check the new 'Southwest booking Tips' document on the Company Notes page." The "Flight Search" section has three tabs: "Round Trip" (selected), "One Way", and "Multi City". Below the tabs are two input fields: "From" (Departure city, airport or train station) and "To" (Arrival city, airport or train station), each with a "Find an airport" link and a "Select multiple airports" link. The "Outbound" section has a calendar icon, a "depart" dropdown, a time field set to "09:00 am", a "± 3" field, and a dropdown arrow. The "Return" section has a calendar icon, a "depart" dropdown, a time field set to "05:00 pm", a "± 3" field, and a dropdown arrow. At the bottom, there are three checkboxes: "Pick-up/Drop-off car at airport", "Automatically reserve this car", and "Find a Hotel".

## Car Search

If you need to reserve a Car only, the quickest method is to select the Car icon. Then, simply enter your car requirements and select Search.

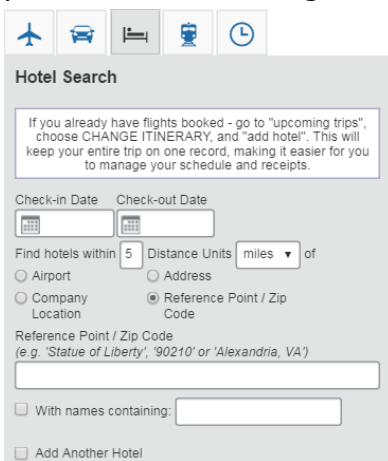
Additional Search Options can be expanded to search for specific requirements



The Car Search form includes a navigation bar with icons for Airplane, Car, Hotel, Train, and Clock. Below the icons is a text box: "If you already have flights booked - go to 'upcoming trips', choose CHANGE ITINERARY, and ADD CAR; your flight arrival information will automatically be added to your car reservation." The form is titled "Car Search" and contains the following fields: "Pick-up date" and "Drop-off date", each with a calendar icon and a time dropdown set to "12:00 pm"; "Pick-up car at:" with radio buttons for "Airport Terminal" (selected) and "Off-Airport", and a text input field "Please enter an airport."; and a checkbox "Return car to another location" with a link "More Search Options" below it.

## Hotel Search

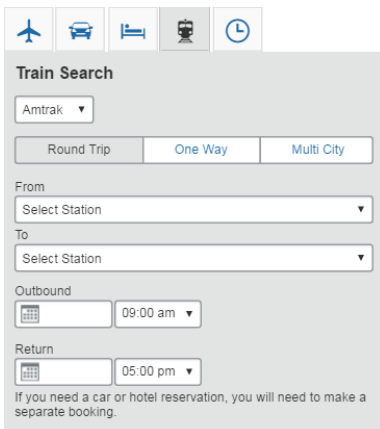
Searching for Hotels only can be accomplished quickly by selecting the hotel bed icon and entering the perimeters for searching.



The Hotel Search form includes a navigation bar with icons for Airplane, Car, Hotel, Train, and Clock. Below the icons is a text box: "If you already have flights booked - go to 'upcoming trips', choose CHANGE ITINERARY, and 'add hotel'. This will keep your entire trip on one record, making it easier for you to manage your schedule and receipts." The form is titled "Hotel Search" and contains the following fields: "Check-in Date" and "Check-out Date" with calendar icons; "Find hotels within" with a dropdown set to "5" and "Distance Units" set to "miles"; radio buttons for "Airport", "Company Location", and "Reference Point / Zip Code" (selected); a text input field "Reference Point / Zip Code (e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA)"; a checkbox "With names containing:" with an empty text input; and a checkbox "Add Another Hotel".

## Train Search

Train only schedules are available for Amtrak or Via Rail by selecting the Train Engine icon. The Airplane icon will compare Flights and Train schedules and fares also.



The Train Search form includes a navigation bar with icons for Airplane, Car, Hotel, Train, and Clock. Below the icons is a dropdown menu set to "Amtrak". The form is titled "Train Search" and contains the following fields: "Round Trip", "One Way", and "Multi City" buttons; "From" and "To" dropdown menus, both set to "Select Station"; "Outbound" and "Return" date and time fields, with "Outbound" set to "09:00 am" and "Return" set to "05:00 pm"; and a text box at the bottom: "If you need a car or hotel reservation, you will need to make a separate booking."

## Section 4: Cancel or Change a Reservation

After purchase, scheduled flights will appear on the traveler's Concur Home page in the "Upcoming Trips" tab.

The screenshot shows the Concur Travel interface. The top navigation bar includes 'CONCUR', 'Travel', and 'App Center'. Below this, there are tabs for 'Travel', 'Trip Library', 'Templates', and 'Tools'. The main content area is split into two sections. On the left is the 'Flight Search' section, which includes a search form with fields for 'Departure City' and 'Arrival City', and a 'Search' button. On the right is the 'Travel Alerts' section, which features a 'Travel Alerts' header and a table of upcoming trips. The table has columns for 'Trip Name/Description', 'Status', 'Start Date', 'End Date', and 'Action'. One trip is listed: 'Trip from Minneapolis/St. Paul to Indianapolis (ZODXSI)' with a status of 'Confirmed', start date of '06/23/2015', end date of '06/28/2015', and an action of 'Cancel Trip'.

If it is necessary to CANCEL the flight, click on "Cancel Flight" under Action. A warning will appear:

The screenshot shows a 'Cancel Trip' warning dialog box. The dialog box has a title 'Cancel Trip' and a warning icon. The text inside the dialog box reads: 'WARNING: You are about to withdraw your request. If you do this, all reservations (including flight, hotel, rental car, and rail) will be cancelled. If you cancel a trip on the day of the planned trip and have hotel reservations that have been guaranteed for late arrival, you must call the hotel directly or risk paying a no-show charge. Concur cannot cancel hotel reservations made when you contacted the hotel directly. If you have any questions, please contact your travel agent. If you are SURE that you want to withdraw this request then please click OK. Otherwise, click CANCEL. If you have any comments you would like to add (for reporting only), please type them below and click OK.' There is a text input field for comments and two buttons at the bottom: 'OK' and 'Cancel'.

After clicking the "OK" button, the trip will be cancelled and cancellation numbers will be provided, if the vendor is able to send them to Concur.

**Note:** If you are unable to cancel or modify the reservation, as needed, please contact Direct Travel Agents at Phone: 617-353-1700 or Email Address: [travelbooking@bu.edu](mailto:travelbooking@bu.edu) for assistance.

## Section 5: Booking Travel for Others

You have several choices for booking travel for others

- Booking **for someone that is traveling with you and needs to be in the same record**
- Travel Arrangers booking a BU Community Employee that is a profiled traveler
- Booking a non-profiled **Guest** traveler
- Booking Group Travel on behalf of Student Activities or other Student Groups

### ***For someone that is traveling with you and needs to be in the same record***

The purpose for booking this type of travel varies but it is primarily for family inclusion on a trip that you want the following advantages:

Book this travel with *Direct Travel* Agents

#### Advantages

- all travelers are on one reservation
- seats are assigned at the same time
- if one traveler has upgrade status, more than one can be upgraded
- traveler profile information for companions is retained
- two credit cards can be used

#### Disadvantages

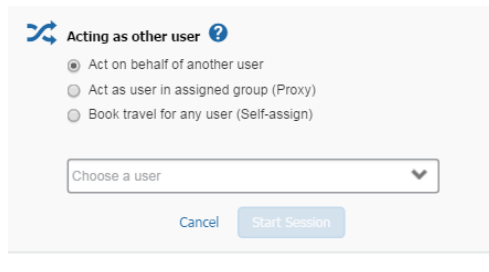
- Direct Travel can service the caller 24x7, but after hours fees may apply if outside of 8a-6p ET

### ***Travel Arranger reserving for a Boston University Faculty or Staff Member***

This would be primarily used by an Administrator reserving travel on behalf of others that are employed by Boston University

Using *Concur Travel*, you will need to be setup as a Travel Arranger and either have self-assigned yourself as the Staff Member's Arranger or they have set you as their Travel Arranger

- Easy to select the Traveler's name from the "Profile" dropdown in the Upper Right corner of the home page



- Select to Book travel for any user (Self-assign) and then enter the name to "Start Session". The traveler will receive an email that you have assigned yourself as an Arranger for them.
- Then reserve travel as you would normally for yourself

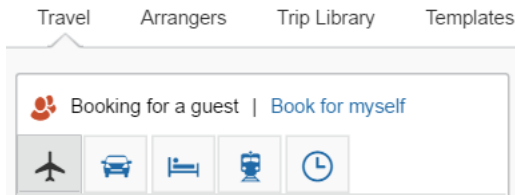
Using a *Direct Travel* Agent to reserve travel for another profiled traveler

- You may call to speak with an agent on behalf of another traveler at Phone: 617-353-1700 or Email Address: [travelbooking@bu.edu](mailto:travelbooking@bu.edu)
- A credit card will need to be provided for the reservation as we can only charge another's credit card with their explicit approval

## Non-profiled Boston Guest

This feature is configured by profile so you will only see it, if your profile has been allowed to make this type of Guest reservation.

Using *Concur Travel*, the feature "Booking for a guest" will display on the home screen.



1. Select and reserve the air, car, hotel or rail segments required as you would normally book travel
2. Once the travel is selected, the "Reserve and Review" screens will allow you to populate
  - a. the Legal Name of the Traveler per their Passport or Driver's License
  - b. their date of birth
  - c. Gender
  - d. Credit Card for Payment
  - e. Frequent Traveler numbers, and
  - f. select Seats

Enter the name of the guest traveler you're booking the trip for. The guest's trip will be subjected to the "Guest Class" policy, or in its absence, the policy which applies to you. Once the trip is booked, it will show up on your Travel home page and be assigned to your account. When you view the itinerary, you will see the traveler's name on the itinerary.

**Please make certain that the first and last names shown below are identical to those on the photo identification that the guest traveler will be presenting at the airport.** Due to increased airport security, the guest may be turned away at the gate if the name on their identification does not match the name on their ticket.

A screenshot of the 'Guest Traveler' form. At the top, there are two radio buttons: 'Manual Entry' (selected) and 'Look up a previous guest by name:'. Below this, the form is divided into several sections. The first section contains fields for 'Title', 'Legal First Name', 'Middle Name (on ID)', and 'Legal Last Name'. There is a checkbox for 'No Middle Name'. The second section contains 'Gender' (a dropdown menu) and 'Date Of Birth' (a date picker). The third section contains 'Known Traveler Number' and 'DHS Redress No.' (both text input fields). The fourth section contains 'Phone' (a text input field) and 'Email' (a dropdown menu).

3. An Invoice/Itinerary known as a Virtual Invoice will be sent to the Email address updated in the reservation.

Using a *Direct Travel Agent* to reserve travel for a Guest

To speak directly with an agent on behalf of another traveler, please call or email at

- Phone: 617-353-1700
- Email Address: [travelbooking@bu.edu](mailto:travelbooking@bu.edu)

1. The agent will use your existing profile to complete the reservation
2. Form of payment must be provided for each reservation
3. You will need to know the Traveler's Legal Name, Date of Birth and Gender to complete



## ***Booking Group Travel on behalf of Student Activities or other Groups***

### **Student Activities Office**

The process for a Student Organization utilizing the Student Activities Office are as follows:

1. The person organizing travel as the Group Contact must entirely complete the OrgSync form found on the Student Activities website including the Organization Name, Event Name and Location
2. Once completed the form is transmitted to Direct Travel for a quote and travel options
3. Direct Travel will provide travel options with pricing to the Group Contact for approval
4. The Student must complete a second form to request funds which is found on the SAO website
5. SAO will review and grant an approval with a number that must be forwarded to Direct Travel within 24 hours of quote to generate tickets and complete the reservation
6. The SAO will make payment for the air travel and group hotels over 10 rooms. The Student must secure non-group room reservation to secure payment from SAO
7. A Virtual Invoice/Itinerary will be sent to the Student Contact and SAO, once completed by Direct Travel

### **For All Other Groups (Not SAO)**

The process for all other Groups traveling on university business:

1. The person organizing travel and making payment for this Group Travel must visit the Travel Services website and complete the Group Travel Request Form, then contact Direct Travel at Phone: 617-353-1700 or Email Address: [travelbooking@bu.edu](mailto:travelbooking@bu.edu)
2. Send Request Form to [travelbooking@bu.edu](mailto:travelbooking@bu.edu) and follow up with a phone call to Direct Travel if request is time sensitive in nature.
3. The Event Name will be collected for reporting; please follow your departments preferred method of pre-trip authorization.
4. Once travel options and pricing have been provided and approved, the reservation will be completed and a Virtual Invoice will be sent by Direct Travel to the Contact (card holder).

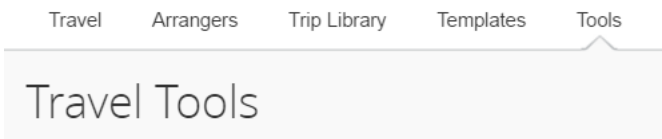
Note:

- Any Groups under 10 travelers or 10 hotel rooms will be supported by the dedicated agents with standard discounts and standard reservations for hotel and car. This type of group is defined as a meeting and is not recognized as a group by air, car or hotel vendors. If a convention hotel is needed, the organizing person may need to complete that hotel reservation.
- If the group is over 10, the Group Agent and Strategic Hotel Resource will engage to obtain better discounts and services as required by the Group. Convention reservations may need to be booked by the organizing person and this will be clarified at time of booking.

## Section 6: Other Features:

### Travel Tools

Select Tools from the Home Screen



For Access to

- Travel Maps
- Weather
- Currency Converter
- U.S. Passport Services
- Travel Warnings
- Foreign Entry Info
- CDC Traveler's Health Alerts
- Tourist Information
- Destination Information
- World Airport Guide
- The World Clock – Time Zones

### Check Flight Status

Concur provides the ability to search for arrival information on any Air Carrier, regardless of whether you booked the reservation or not.

Select “Check Flight Status” (clock icon) and enter city pair, date and carrier with the flight number being optional.

### Adding to an Existing Reservation

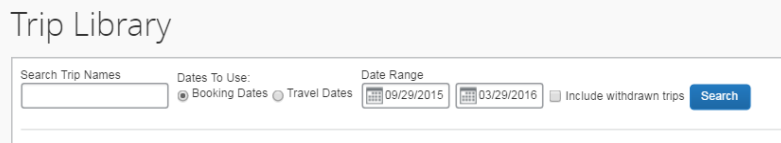
When a segment is previously booked and you wish to add additional travel segments there are steps you will want to take to combine this in one reservation. For example Air travel was previously booked and you now wish to add a car.

1. Go to “Upcoming Trips”
2. Choose the itinerary you wish to modify or add additional segments
3. Search for and select all necessary segments to add
4. Complete the travel with Reserve and Review, as you normally would with a new reservation

**Note:** Be sure you check the dates and times closely so they match to provide a seamless happy travel arrangement

## ***Trip Library***

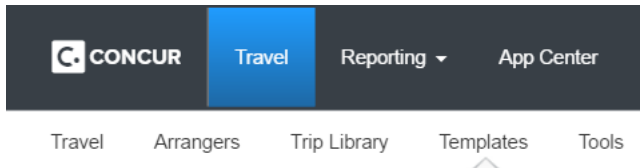
You can search for past date travel itineraries via the link at the top of the page



The screenshot shows the 'Trip Library' search interface. It features a search bar for 'Search Trip Names' and a 'Dates To Use' section with radio buttons for 'Booking Dates' (selected) and 'Travel Dates'. A 'Date Range' section includes two date pickers: the first is set to '09/29/2015' and the second to '03/29/2016'. There is a checkbox for 'Include withdrawn trips' and a blue 'Search' button.

## ***Templates***

The purpose for templates is to replicate individual travel itineraries that have already occurred. You can save any itinerary as a template to keep private or share with others



1. Simply select the Template you wish to replicate
2. Enter new dates and times
3. Search and Reserve travel quickly
4. Complete as normal

Note: They can be reused as many times as needed to book multiple people by an arranger or repetitive travel to a specific destination.