



## BOOKING TRAVEL WITH CHRISTOPHERSON BUSINESS TRAVEL AND CONCUR ONLINE

This guide is designed to walk you through how to update your Concur Travel profile and start booking travel online or with the Christopherson Business Travel (CBT) team.

Concur Travel enables you to:

- Reserve, modify or share your air, rail, car or hotel booking online at any time and on any day.
  - To speak directly with a BU-trained agent at CBT, call 617-353-1700 or email [travelbooking@bu.edu](mailto:travelbooking@bu.edu)
  - Core hours are 8am-6pm ET, Monday-Friday
- Receive real-time updates shared seamlessly between CBT agents and Concur
- Easily view the BU travel policy and preferred suppliers, which are automatically highlighted.

For additional assistance, please contact the Boston University Travel and Card Services team via the [Financial Affairs Customer Service portal](#).



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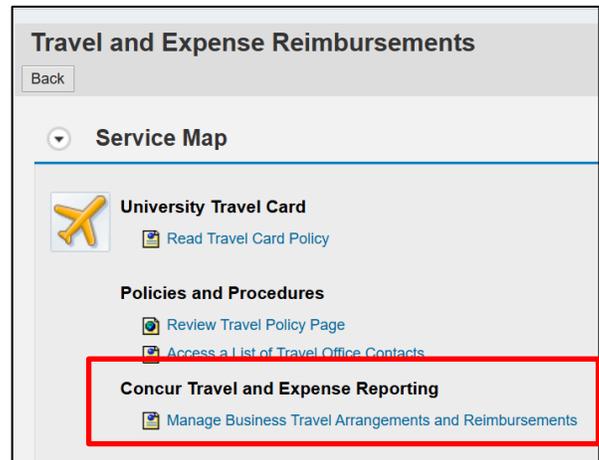
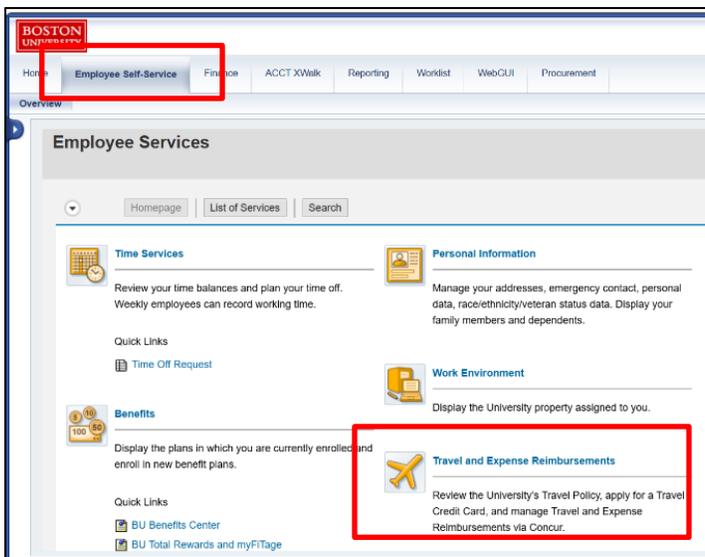
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**I. LOG ON TO CONCUR**

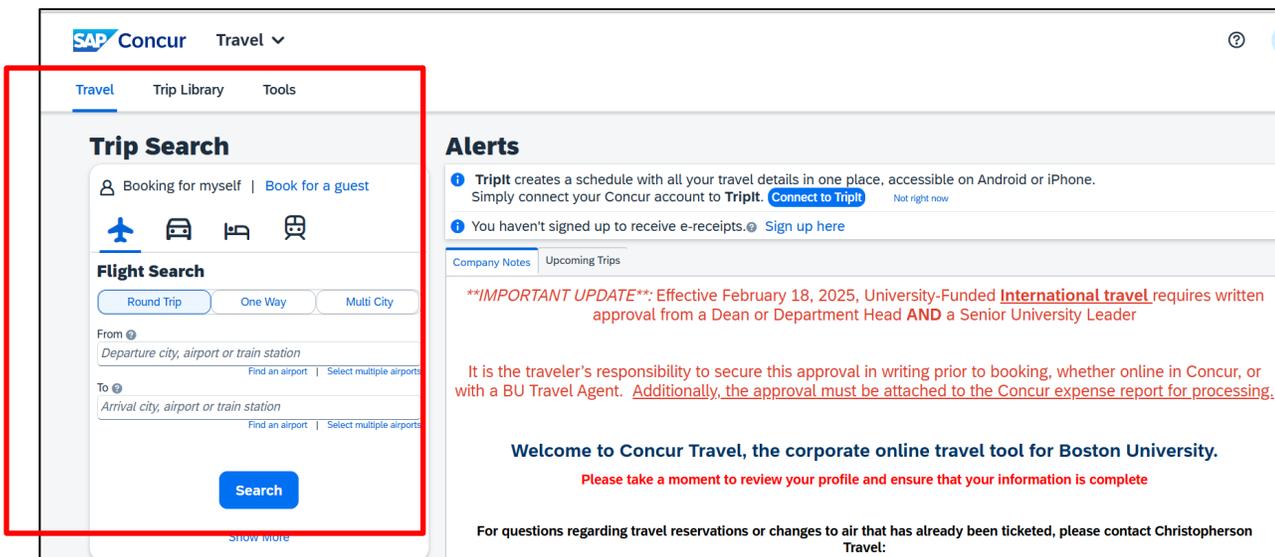
To get started using Concur, access the [BUworks Central Portal](#) via your Kerberos login. Within the BUworks portal, select the following:

1. **Employee Self-Service** (tab along top of page)
2. **Travel and Expense Reimbursements** (within the body of the Employee Self-Service tab)
3. **Manage Business Travel Arrangements and Reimbursements** (beneath the Concur Travel and Expense Reporting heading)

Once you have logged in with your Kerberos username and password, you will be able to start using Concur to book travel.

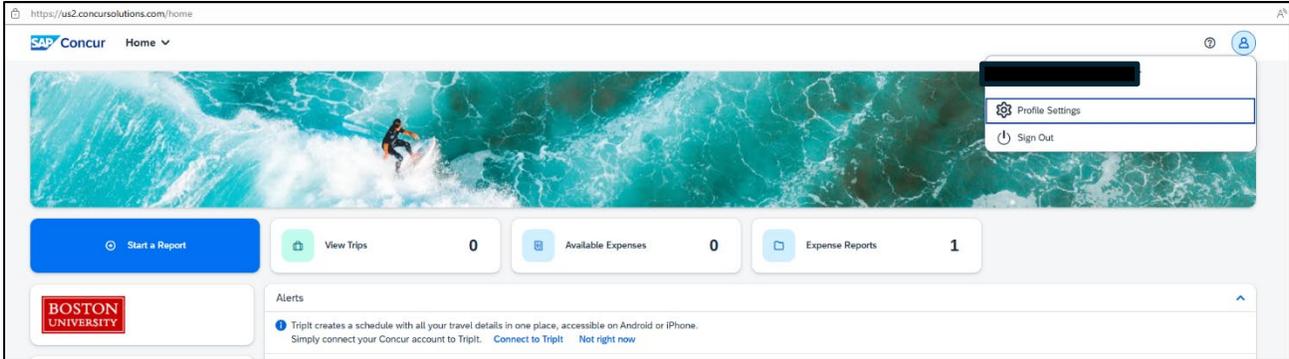


The home page will display features that have been activated for your profile.



**II. UPDATE YOUR TRAVEL PROFILE**

1. On the Concur home page, click the **profile** icon in the top right corner of the Concur home page.



2. Select “Profile Settings” to display **Profile Options**.

<p><b>Your Information</b></p> <ul style="list-style-type: none"> <li>Personal Information</li> <li>Company Information</li> <li>Contact Information</li> <li>Email Addresses</li> <li>Emergency Contact</li> <li>Credit Cards</li> </ul> <p><b>Travel Settings</b></p> <ul style="list-style-type: none"> <li>Travel Preferences</li> <li>International Travel</li> <li>Frequent-Traveler Programs</li> <li>Assistants/Arrangers</li> </ul> <p><b>Expense Settings</b></p> <ul style="list-style-type: none"> <li>Expense Information</li> <li>Expense Delegates</li> <li>Expense Preferences</li> <li>Expense Approvers</li> <li>Favorite Attendees</li> <li>Expense Credit Cards</li> </ul> <p><b>Other Settings</b></p> <ul style="list-style-type: none"> <li>E-Receipt Activation</li> <li>System Settings</li> <li>Concur Connect</li> <li>Concur Mobile Registration</li> </ul>	<p><b>Profile Options</b></p> <p>Select one of the following to customize your user profile.</p> <p><b>Personal Information</b> Your home address and emergency contact information.</p> <p><b>Company Information</b> Your company name and business address or your remote location address.</p> <p><b>Credit Card Information</b> 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.</p> <p><b>E-Receipt Activation</b> Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p><b>Expense Delegates</b> Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p><b>Concur Mobile Registration</b> Set up access to Concur on your mobile device.</p> <p><b>System Settings</b> Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?</p> <p><b>Contact Information</b> How can we contact you about your travel arrangements?</p> <p><b>Setup Travel Assistants</b> You can allow other people within your companies to book trips and enter expenses for you.</p> <p><b>Travel Profile Options</b> Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p><b>Expense Preferences</b> 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.</p>
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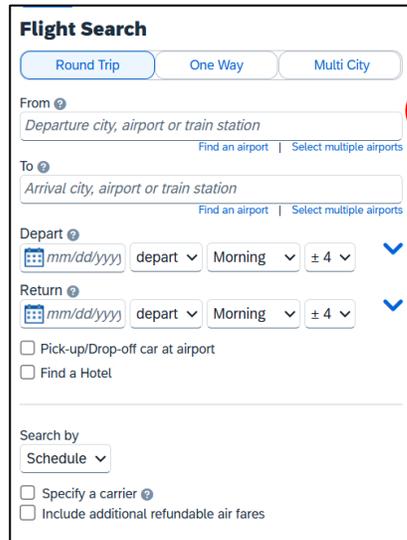
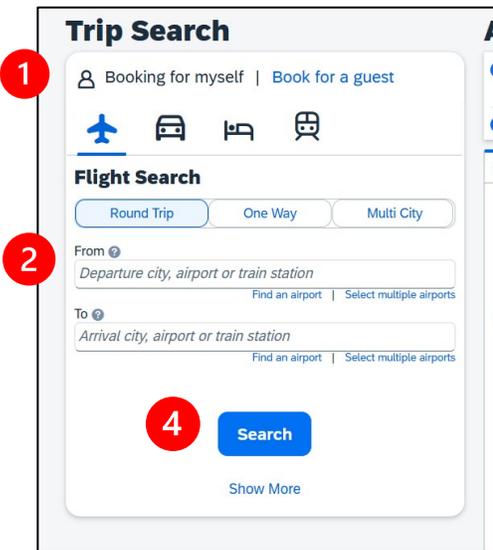
3. Update information as necessary and click “**Save.**”

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.

III. MAKE A RESERVATION

SEARCH FOR A FLIGHT

1. Click the airplane icon and select round trip, one way, or multi-city.
2. Enter your location in the “From” field and your destination in the “To” field.
  - a. Click “Find an airport” for assistance locating the appropriate airport in your desired location.
3. Select your Departure and Return dates. The dropdown menu will display hourly options.
  - a. To widen the scope of your search, change the number of hours in the number field (e.g., +/- 4)
4. Click “Search” to populate results.
5. Review and select your preferred flights. Modify your search results by changing information along the left side of the page. Note the following\*:
  - a. A *green* icon indicates the fare is within policy
  - b. A *yellow* alert symbol 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.
  - c. A *red* icon indicates this is out of policy and you will not be allowed to confirm this segment
6. Review and Reserve the flight segments before completing your reservation or adding car and hotel bookings. Remember to select your seats.



\*Note the colored icons and warning symbols.

Fare Options	Free Checked Bags	Refundable		
Economy (K) <a href="#">Rules</a> <a href="#">Benefits/Services</a>	0	No		\$266.38
Economy fully refundable (K) <a href="#">Rules</a> <a href="#">Benefits/Services</a>	0	Yes Fees may apply		\$346.36
<a href="#">View more fares</a>				
Galileo				

**CAR SEARCH**

- If you only need to reserve a car, the quickest method is to select the car icon.
- Next, enter your pick-up and drop-off dates and click “More Search Options” to select additional requirements.
- Click “Search” and review results.

**HOTEL SEARCH**

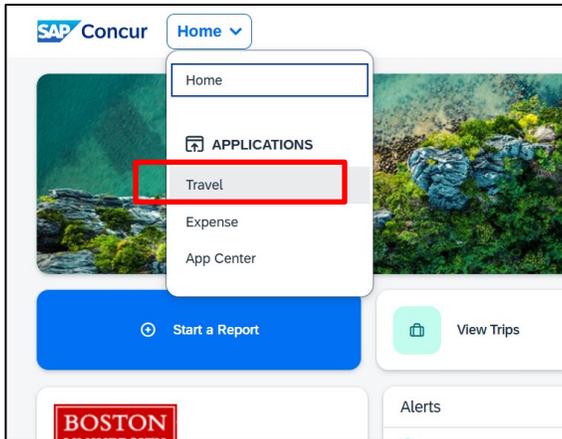
- If you are only searching for a hotel, select the bed icon and enter the parameters for your selection.

**TRAIN SEARCH**

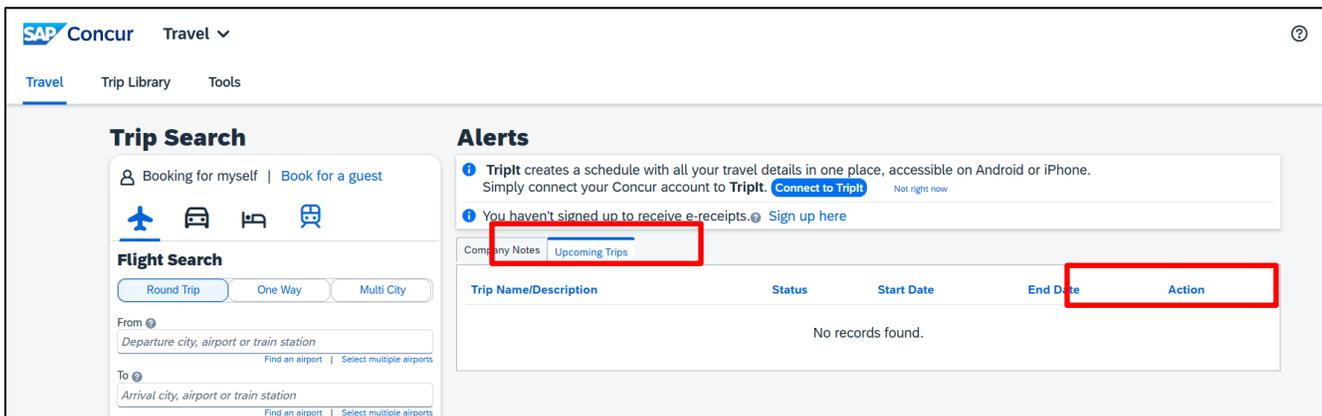
- Select the train engine icon to view train schedules for Amtrak or Via Rail.
- The Airplane icon will also compare Flights and Train schedules and fares.

**IV. CANCEL OR CHANGE A RESERVATION**

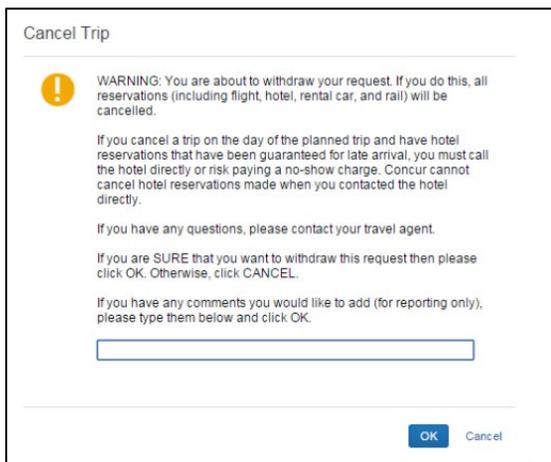
- Scheduled flights can be viewed after they've been purchased. Click on the "Home" drop-down at the top of the Concur home page and select "Travel."



- View scheduled trips in the "Upcoming Trips" tab. To cancel a flight, click "Cancel Flight" under "Actions".



- After you click "Cancel Flight," the warning below will appear. Review and click "OK." Once you click "OK," the trip will be cancelled, and cancellation numbers will be provided.





Note: If you are unable to cancel or modify the reservation, please contact Christopherson Business Travel by calling 617-353-1700 or emailing [travelbooking@bu.edu](mailto:travelbooking@bu.edu).

Note: When looking to cancel/change reservations, confirm with CBT or the travel supplier whether your reservation will be refunded or if you will be given a credit/voucher to use toward future travel.

- If your travel is being refunded, please follow steps in [How to Reconcile Fraudulent Transactions and Handle Refunds](#).
- If you have been provided with a credit/voucher for future travel, add the charges for flight credits to a Concur expense report.
  - Set the end date in the report header as a future date (the date by which the travel management company or airline has stipulated the credit must be used). Once a new flight has been booked using this credit, adjust the end date in the report header to be the new end date of travel. Once the travel has occurred, submit the report along with any other charges related to the trip.

## V. BOOKING TRAVEL FOR OTHERS

Instances where you might book travel for others include:

- A. Booking for someone who is traveling with you and needs to be in the same record
- B. You are a Travel Arranger booking for a BU faculty/staff member who is a profiled traveler
- C. Booking for a non-profiled guest traveler
- D. Booking group travel on behalf of the Student Activities Office or other student groups

### *BOOKING FOR SOMEONE WHO IS TRAVELING WITH YOU AND NEEDS TO BE IN THE SAME RECORD*

Book this travel with Christopherson Business 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

For assistance, you may call Christopherson Business Travel at any time on any day; fees may apply for service offered beyond core business hours of 8am-6pm ET.

### *BOOKING AS A TRAVEL ARRANGER FOR A BU FACULTY/STAFF MEMBER*

This method applies primarily when an administrator is reserving travel on behalf of others BU employees. The administrator reserving travel must be set up as a Travel Arranger in Concur. The employee for whom the reservation is being made may set up the administrator as their Travel Arranger or the administrator may self-assign themselves as the individual's Travel Arranger by completing the following steps:

1. From the Concur home page, click on the Profile icon in the top right corner and select "Act as Another User."
2. Click on the option to Act As "A Delegate for another person who has granted you this permission," enter the employee's name and click "Switch." The employee who will be traveling will receive an email that you have assigned yourself as their Travel Arranger.
3. Proceed to reserve travel as you normally would for yourself.

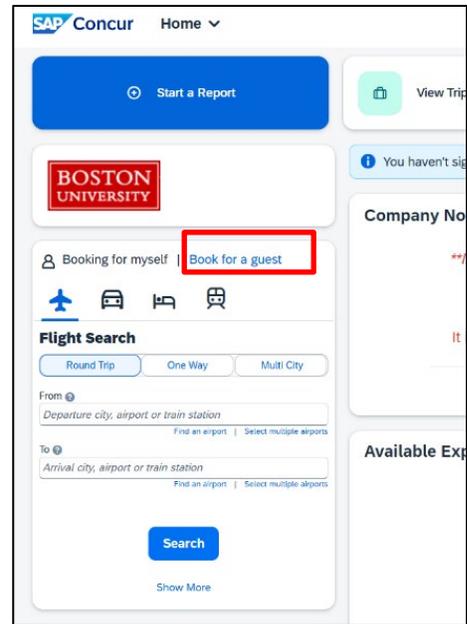
You may also work with Christopherson Business Travel (CBT) to reserve travel for another profiled traveler:

1. Contact a CBT agent directly by calling 617-353-1700 or emailing [travelbooking@bu.edu](mailto:travelbooking@bu.edu)
2. You will need to provide a credit card for the reservation. Someone else's credit card can only be charged with their explicit approval

**BOOKING FOR A NON-PROFILED GUEST TRAVELER**

Note: This feature is configured by profile and will only be accessible if your profile has been configured to make this type of guest reservation.

1. Select **“Book for a guest”** on the Concur Travel home page.
2. Select and reserve air, car, hotel, or rail as you normally would.
3. Once travel is selected, the **“Reserve and Review”** screens will allow you to enter the following information and select seats:
  - a. Traveler’s legal name (as stated on their Passport or driver’s license)
  - b. Traveler’s date of birth
  - c. Traveler’s gender
  - d. Credit card for payment
  - e. Frequent Traveler numbers



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.

**Guest Traveler**

Manual Entry    Look up a previous guest by name:

Title   Legal First Name   Middle Name (on ID)    No Middle Name   Legal Last Name

Gender   Date Of Birth

Known Traveler Number   DHS Redress No.

Phone   Email

4. An invoice/itinerary, **“Virtual Invoice,”** will be sent to the email address entered in the reservation.

You may also work with Christopherson Business Travel (CBT) to reserve travel for a guest.

1. Contact a CBT agent directly by calling 617-353-1700 or emailing [travelbooking@bu.edu](mailto:travelbooking@bu.edu)
2. The agent will use your existing profile to complete the reservation.
3. You will need to provide a credit card for the reservation. Someone else’s credit card can only be charged with their explicit approval.
4. You will need to know the traveler’s legal name, date of birth, and gender to complete the reservation.

**BOOKING GROUP TRAVEL ON BEHALF OF THE STUDENT ACTIVITIES OFFICE (SAO) OR OTHER STUDENT GROUPS**Student Activities Office (SAO)

The process for a student organization utilizing the Student Activities Office (SAO) is as follows:

1. The person organizing travel as the Group Contact must complete the [Terrier Central Event Request Form](#) (accessible via the [Student Activities Office website](#)) and include the organization name, event name, and location.
2. SAO will provide the group with a form and email address to contact Christopherson Business Travel for a quote and travel options.
3. Christopherson Business Travel will provide travel options with pricing to the group contact person for approval.
4. The student group must respond via email within 24 hours, including SAO professional staff and a completed form that includes travel information, to generate tickets and complete reservations.
5. SAO will make payment for air travel and the student group must submit a Purchase Request to ensure proper account reconciliation.
6. A Virtual Invoice/Itinerary will be sent to the Student Group Contact and SAO once completed by Christopherson Business Travel.

Other groups (not associated with SAO):

The process for all other groups traveling on university business is as follows:

1. The person organizing and making payment for this group travel must complete the [Group Travel Request Form](#) on the [Travel Services website](#).
2. The travel organizer must then contact Christopherson Business Travel via phone at 617-353-1700 or by email at [travelbooking@bu.edu](mailto:travelbooking@bu.edu).
  - a. Note: If the travel request is urgent, please send the Request Form to [travelbooking@bu.edu](mailto:travelbooking@bu.edu) and follow up with a phone call to Christopherson Business Travel.
3. The Event Name will be collected for reporting. Please follow your department's 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 Christopherson Business Travel to the contact person (the card holder).

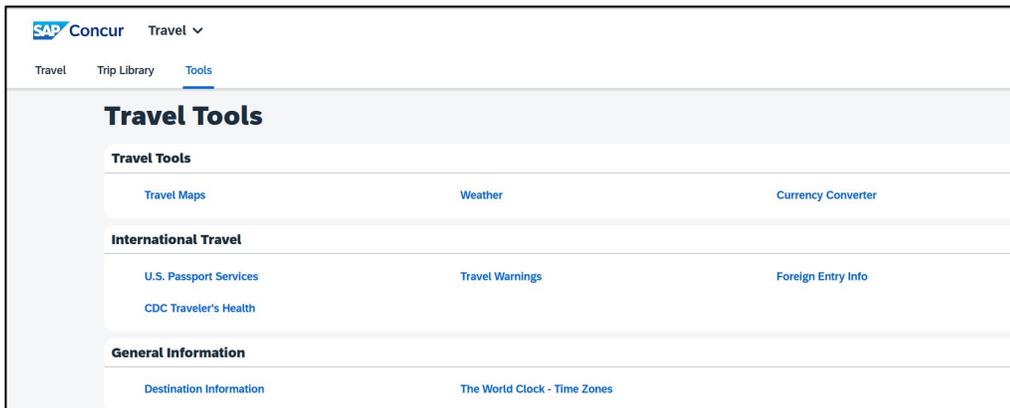
## Note:

- Any groups under 10 travelers or 10 hotel rooms will be supported by 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.

**VI. OTHER FEATURES:**

**TRAVEL TOOLS**

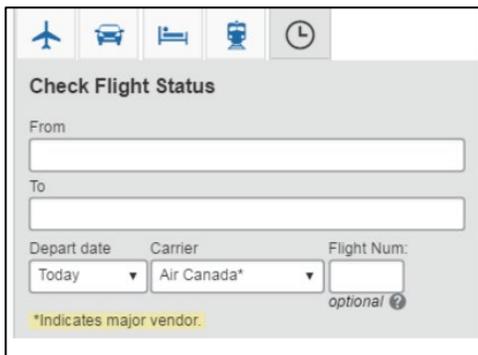
1. From the Concur Travel home screen, select the “Tools” tab for access to the following:
  - a. Travel Maps
  - b. Weather
  - c. Currency Converter
  - d. U.S. Passport Services
  - e. Travel Warnings
  - f. Foreign Entry Info
  - g. CDC Traveler’s Health
  - h. Destination Information
  - i. World Airport Guide
  - j. The World Click – Time Zones



**CHECK FLIGHT STATUS**

Concur allows you to search for arrival information on any air carrier, regardless of whether you booked the reservation or not.

1. Select “Check Flight Status” (the clock icon) and enter location information in the “From” and “To” fields, as well as the depart date, carrier, and (optional) flight number.



**ADD TO AN EXISTING RESERVATION**

If you wish to add additional segments to a travel segment you've already booked, follow these steps:

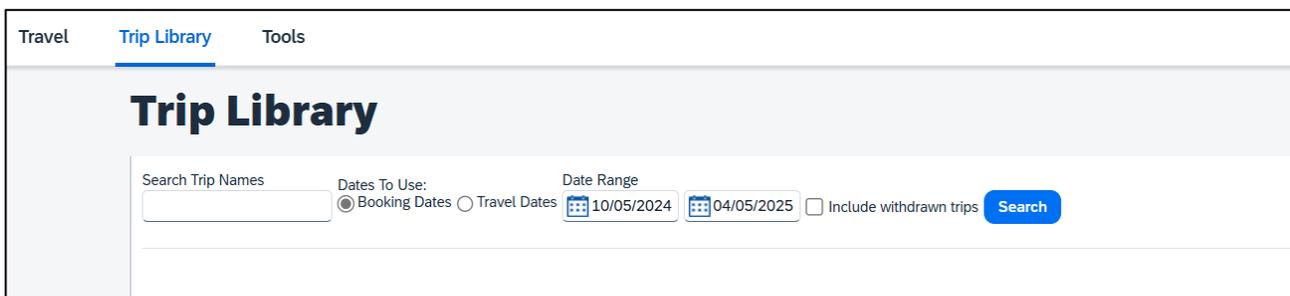
(e.g., if you have booked air travel and now wish to add a car reservation in the same booking)

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

Note: Be sure to check the dates and times to ensure they match so you may enjoy a seamless travel experience.

**TRIP LIBRARY**

You can search for previous travel itineraries via the link at the top of the page.



The screenshot shows a web interface for the Trip Library. At the top, there are navigation tabs for "Travel", "Trip Library" (which is selected), and "Tools". Below the tabs, the heading "Trip Library" is displayed in a large, bold font. Underneath the heading, there is a search form with the following elements: a text input field labeled "Search Trip Names"; a "Dates To Use:" section with two radio buttons, "Booking Dates" (which is selected) and "Travel Dates"; a "Date Range" section with two date pickers, the first showing "10/05/2024" and the second showing "04/05/2025"; a checkbox labeled "Include withdrawn trips" which is currently unchecked; and a blue "Search" button.

**TEMPLATES**

Templates are helpful if you need to replicate individual travel itineraries that have already occurred. You can save any itinerary as a template and keep in private or share with others.

1. Select the Template you wish to replicate
2. Enter new dates and times
3. Search and Reserve travel quickly
4. Complete reservation as usual

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