

HOW TO BOOK TRAVEL IN CONCUR

Benefits of Booking Travel in Concur:

1. Book and manage travel online anytime.

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 Christopherson Business Travel (CBT), call 617-353-1700 or email travelbooking@bu.edu. Core hours are 8am-6pm ET, Mon-Fri.

2. Stay informed with real-time travel updates.

Receive real-time updates shared seamlessly between CBT agents and Concur.

3. Access BU preferred suppliers, compliant with BU Travel policy.

BU preferred suppliers are automatically highlighted.

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

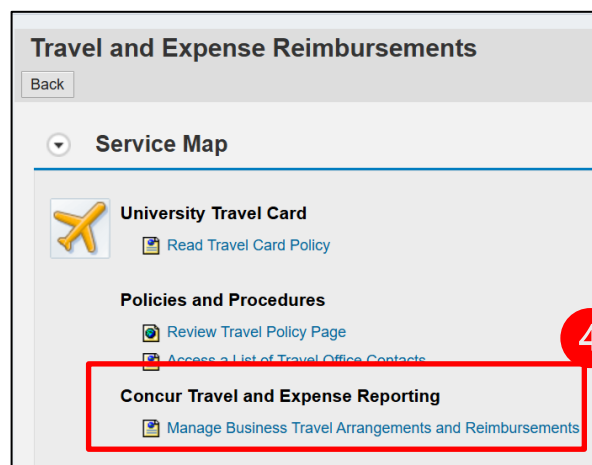
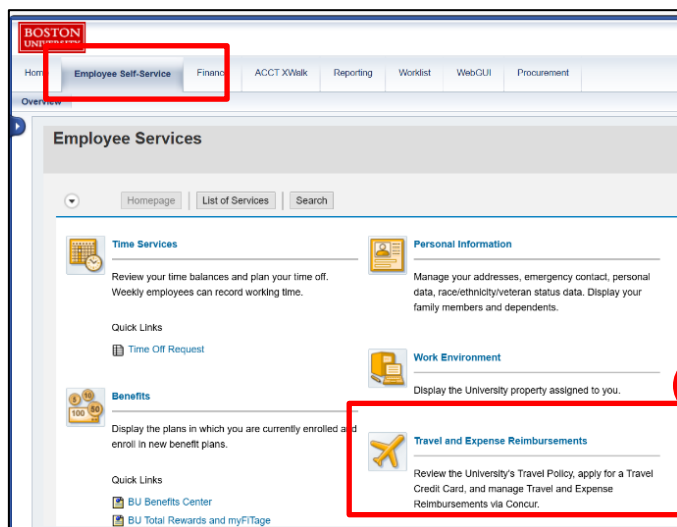


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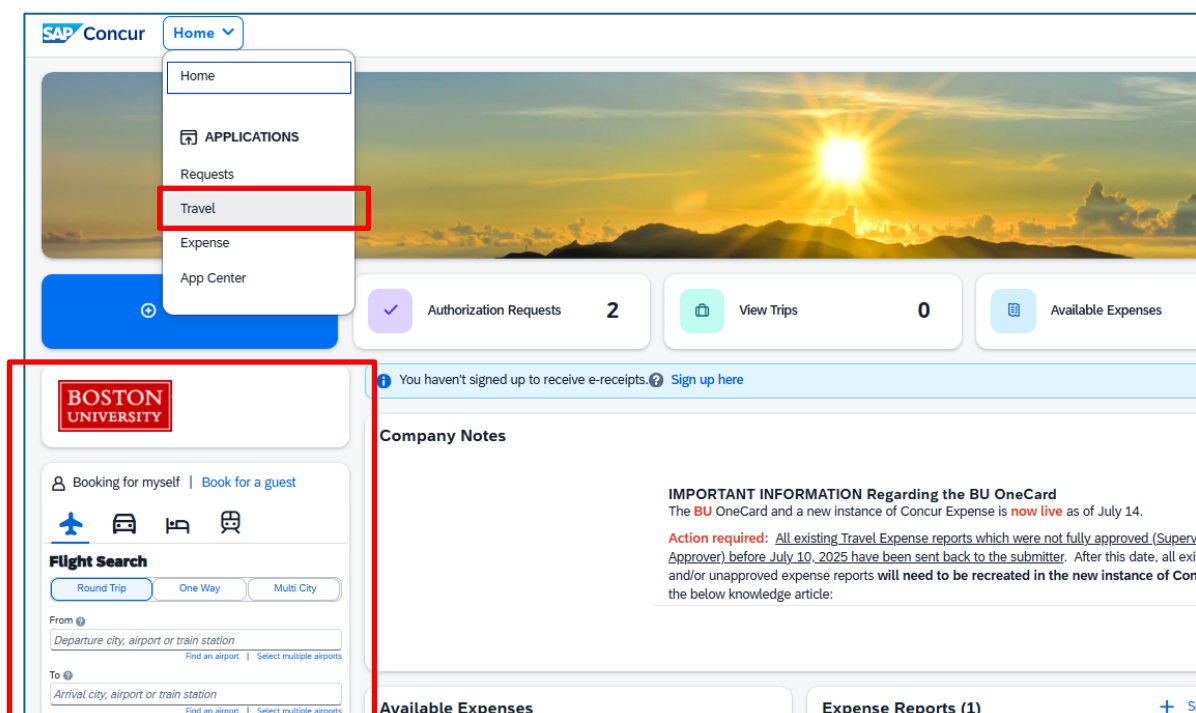
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I. LOG IN TO CONCUR

1. Log in to the [BUworks Central Portal](#) with your Kerberos username and password.
2. Click on the **Employee Self-Service** tab along the top of the page.
3. Select **Travel and Expense Reimbursements**.
4. Click **Manage Business Travel Arrangements and Reimbursements**.

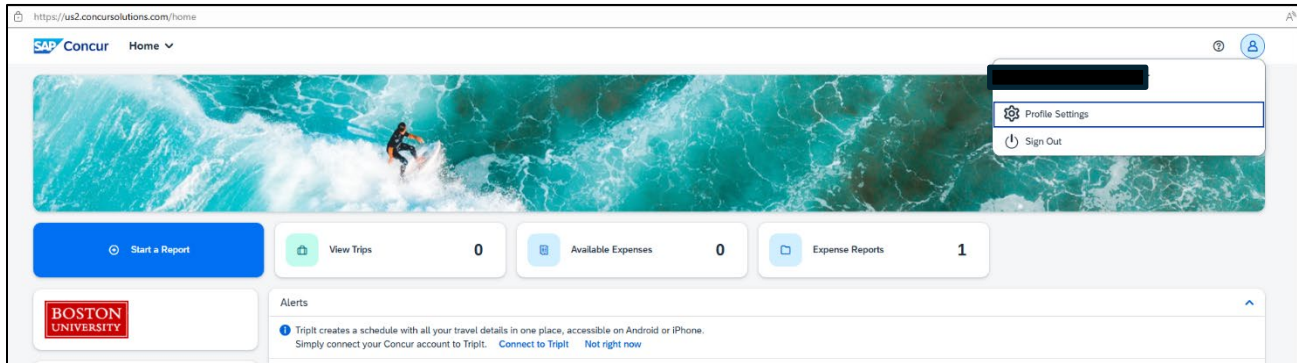


The home page displays features for booking travel. Click on the **Home** drop-down and click on **Travel** to view more.



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**.

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees
- Expense Credit Cards

Other Settings

- E-Receipt Activation
- System Settings
- Concur Connect
- Concur Mobile Registration

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.

Expense Delegates

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

Concur Mobile Registration

Set up access to Concur on your mobile device

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 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.

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.

SEARCH FOR A FLIGHT

1. Click the airplane icon and select round trip, one way, or multi-city.
2. Enter your departure location in the **From** field and your arrival location in the **To** field. Note: 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. Note: 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 icons and warning symbols*:
 - a. A *green* icon indicates the fare is within policy.
 - b. A *yellow* alert symbol indicates the fare is outside of policy; you will need 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.

1

Trip Search

Booking for myself | Book for a guest

2

Flight Search

Round TripOne WayMulti City

From
Departure city, airport or train station
Find an airport | Select multiple airports

To
Arrival city, airport or train station
Find an airport | Select multiple airports

Depart
mm/dd/yyyydepartMorning±4

Return
mm/dd/yyyydepartMorning±4

☐ Pick-up/Drop-off car at airport
☐ Find a Hotel

Search by
Schedule

☐ Specify a carrier
☐ Include additional refundable air fares

4

Search

Show More

*Colored icons and warning symbols may appear as depicted below.

Free Checked Bags	Refundable
Economy (K) Rules Benefits/Services	No
Economy fully refundable (K) Rules Benefits/Services	Yes Fees may apply

CAR SEARCH

1. To reserve a car, select the car icon.
2. Next, enter your pick-up and drop-off dates and click **More Search Options** to select additional requirements.
3. Click **Search** and review results.

HOTEL SEARCH

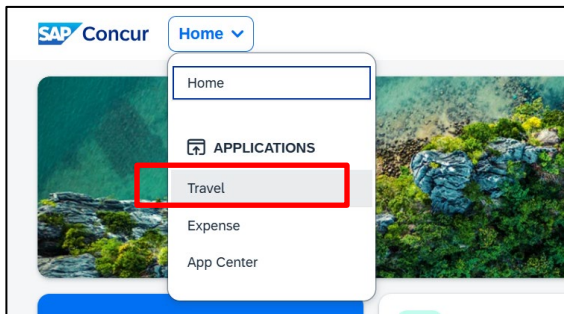
1. If you are only searching for a hotel, select the bed icon and enter the parameters for your selection.
2. Click **Search** and review results.

TRAIN SEARCH

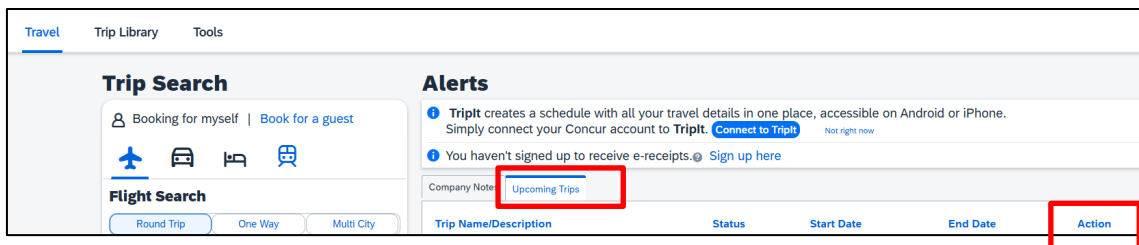
1. Select the train icon to view train schedules for Amtrak or Via Rail.
2. The Airplane icon will also compare Flights and Train schedules and fares.
3. Click **Search** and review results.

IV. CANCEL OR CHANGE A RESERVATION

1. To view scheduled flights, click on the **Home** drop-down menu and select **Travel**.



2. View the **Upcoming Trips** tab to access your flights.
3. To cancel a flight, click **Cancel Flight** under Action.



4. 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.

Cancel Trip

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.

OK Cancel

Unable to cancel or modify the reservation? Please contact Christopherson Business Travel by calling 617-353-1700 or emailing travelbooking@bu.edu.

Refunds or credits/vouchers for cancelled/changed 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.

- **Refund.** If your travel is being refunded, please follow steps in [How to Manage Refunds](#).
- **Credit/Voucher.** If you have been provided a credit/voucher for future travel, add the charges for flight credits to a Concur Travel Expense Report.
 - In the report header, set the end date to the deadline by which the travel credit must be used (as specified by the airline or travel management company).
 - After booking a new flight using the credit, update the end date to reflect the new travel end date.
 - Once the travel is completed, submit the report along with any additional charges related to the trip.

V. BOOKING TRAVEL FOR OTHERS

Instances where you might book travel for others include:

- A. You are traveling with someone and need to include them in the same reservation.
- B. You are a Travel Arranger booking travel for a BU faculty/staff member who has a travel profile.
- C. You are booking travel for a guest who does not have a travel profile.
- D. You are organizing group travel on behalf of the Student Activities Office or another student organization.

A. How to book for someone who is traveling with you & needs to be in the same reservation

If you are traveling with someone and need to be on the same reservation, book with Christopherson Business Travel agents to take advantage of the following benefits:

- All travelers are included in a single reservation
- Seats can be assigned at the same time
- If one traveler has upgrade status, it may apply to others in the group
- Companion traveler profile information is saved for future use
- Two separate credit cards can be used for payment

Call Christopherson Business Travel for assistance; fees may apply for service offered beyond core business hours of 8am-6pm ET.

B. How to book as a Travel Arranger for a BU faculty/staff member who has a travel profile

If you are set up as a Travel Arranger for a BU faculty/staff member, you can book travel for them in Concur or by contacting Christopherson Business Travel.

In Concur:

1. Once you are set up as the Travel Arranger by the BU employee for whom you are booking travel, log in to Concur and click on the **Profile** icon in the top right corner of the page.
2. Select “Act as Another User” and 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**.
3. Proceed to book travel as you normally would for yourself.

Contact Christopherson Business Travel:

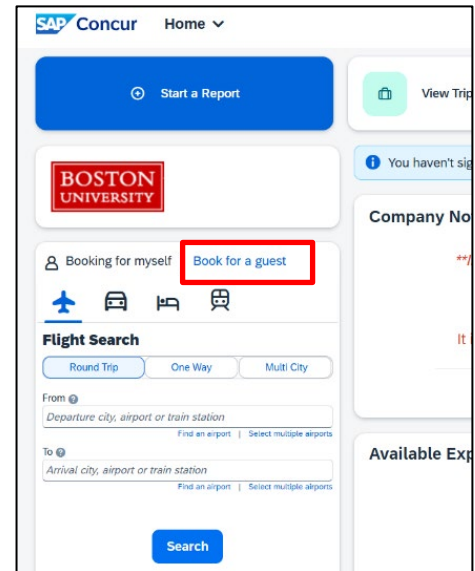
1. Contact a CBT agent directly by calling 617-353-1700 or emailing travelbooking@bu.edu
2. You will need to provide a credit card for the reservation. Someone else’s credit card can only be charged with their explicit approval

C. How to book travel for a guest who does not have a travel profile

In Concur:

In order to book travel for a guest who does not have a travel profile, your Concur profile must be 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
4. An invoice/itinerary, "Virtual Invoice," will be sent to the email address entered in the reservation.



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

Contact 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
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.

D. How to book travel on behalf of the Student Activities Office or other student organization

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

1. The person organizing travel (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 (CBT) for a quote and travel options.
3. CBT 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 CBT.

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 by phone at 617-353-1700 or by email at travelbooking@bu.edu.
 - a. Note: If the travel request is urgent, please send the Request Form to 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).

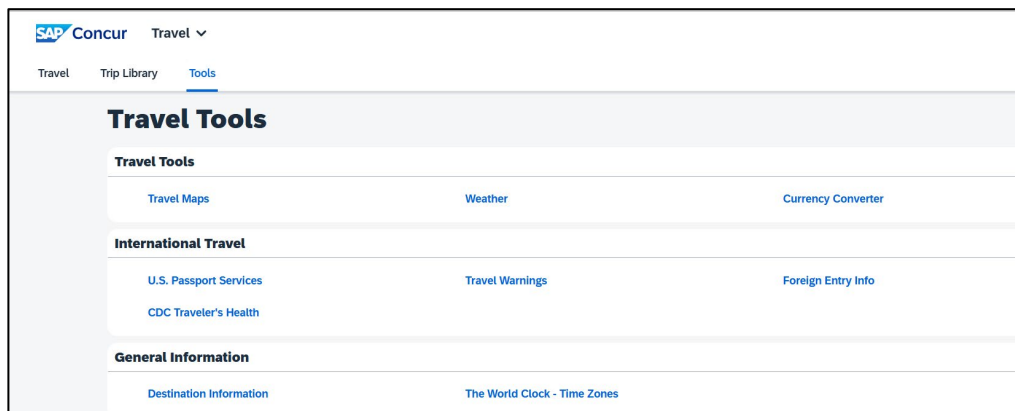
Note:

- Any groups with fewer than 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 has over 10 travelers or 10 hotel rooms, 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

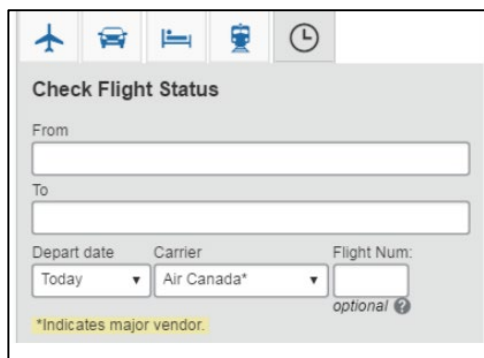
1. From the Concur Travel home screen, select the “Tools” tab for access to the following:
 - a. Travel Maps
 - b. Weather
 - c. Currency Converter
 - d. U.S. Passport Services
 - e. Travel Warnings
 - f. Foreign Entry Info
 - g. CDC Traveler’s Health
 - h. Destination Information
 - i. World Airport Guide
 - j. The World Clock – 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 the 'Trip Library' section of the Concur interface. At the top, there are tabs for 'Travel', 'Trip Library' (which is selected), and 'Tools'. Below the tabs, the heading 'Trip Library' is displayed. Underneath, there is a search bar labeled 'Search Trip Names'. To the right of the search bar, there are options for 'Dates To Use': 'Booking Dates' (selected with a radio button) and 'Travel Dates' (unselected). Further right, there is a 'Date Range' section with two date pickers showing '10/05/2024' and '04/05/2025'. To the right of the date range, there is a checkbox labeled 'Include withdrawn trips' which is currently unchecked. A blue 'Search' button is located to the right of the checkbox.

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.