Concur Online Booking Tool: Tips and Tricks

This document will highlight some tips and tricks users may take advantage of within the Concur Online Booking Tool. This document will be most helpful to users who are already familiar with the tool. If you wish to make yourself more familiar with the tool's basics, please see the other training documents located at https://osutravel.osu.edu/book-online/concur-reference/.

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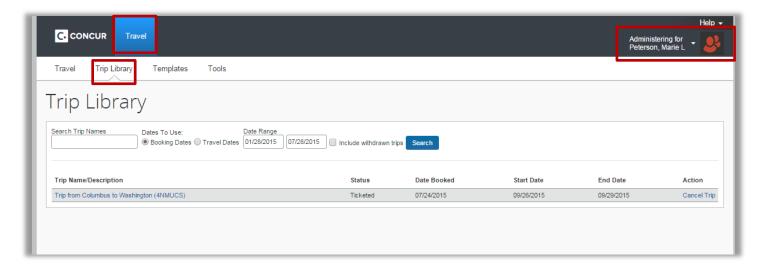
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Viewing Past and Upcoming Trips:

Past and upcoming trips can be viewed in your "Trip Library." To access your Trip Library, select "Travel" from the top banner, then select "Trip Library."

If you are assigned the role of Travel Assistant, you may also access the trip library for the person you administer for. In order to do this, you will need to be administering on that person's behalf, then select "Trip Library."



From the Trip Library, you may search by the name of your trip (if you assigned it at the time of booking), by booking dates, or travel dates. You also have the option to view any trips that were withdrawn (i.e. the trip was canceled or the booking process was not completed).

Did you know?

Even trips that are booked via Agent Assist with Corporate Travel Planners will show up in your Concur Trip Library.

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Cloning Trips and Creating Trip Templates:

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One of the more unique tools within Concur is the ability to clone a trip, or create a trip template. For instance, if you travel frequently between Columbus and Washington DC you could create a template for that trip allowing you to save time when booking subsequent trips. If you and a coworker will be traveling together, you could use the Clone Trip feature to book the same flights for your coworker, provided they assign you as their Travel Assistant in Concur.

Below you will find guides for each type of Template, as well as instructions on cloning trips.

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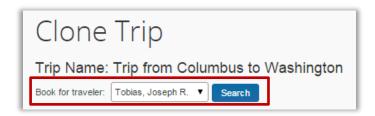
Cloning a Trip:

To clone a trip, first access your "Trip Library" and select the trip you wish to clone.

Under the "Trip Overview" section, select "Clone Trip."



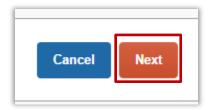
Select the Traveler for whom you would like the Cloned Trip to be booked. You will have the ability to Book the trip for any traveler who currently has you assigned as their Travel Arranger. For more information on travel arrangers see the training document titled: "Assigning a Travel Assistant in Concur" located at https://osutravel.osu.edu/book-online/concur-reference/.



Adjust the "Depart Dates" as needed.



When you are satisfied, select "Next."



Complete the booking process as usual from this point forward. For more information see the training documents titled: "Booking Airfare for Another Employee," "Booking Airfare for a Guest," and "Booking Airfare for Yourself." The documents can be found at https://osutravel.osu.edu/book-online/concurreference/.

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Creating Templates:

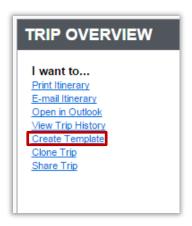
A Template can be created to quickly book the same trip multiple times, to repeat similar trips over different dates, or book a coworkers itinerary for yourself or another traveler.

Below outlines various methods for creating a template.

Creating a Template from one of your Trips:

First access your "Trip Library" and select the trip you wish to use to create the template.

Under the "Trip Overview" section, select "Create Template."

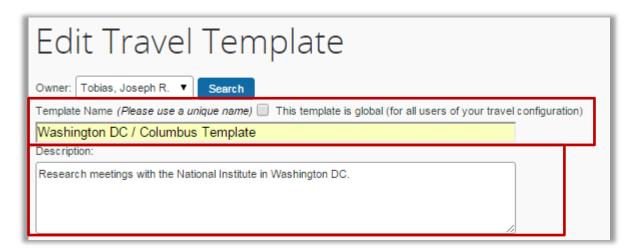


Select who you would like to be the "Owner" of the Template. For private templates, the owner is the only person who will have access to the template. Selecting the "This template is global" box will make this template available to all OSU users.

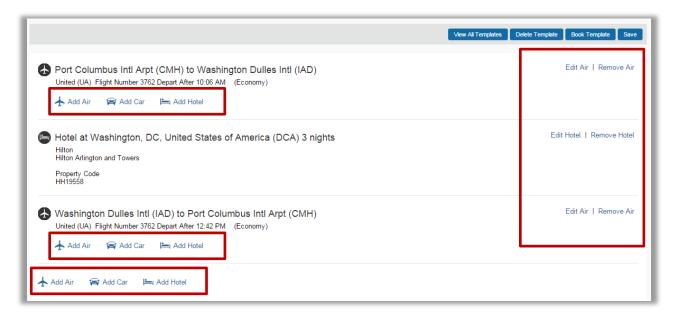
Important: If this template will be used for another traveler the "This template is global" box must be checked. If this box is not checked, the template owner will be the only person who will be able to be booked using this template.



Give your template a name, and brief description.



Make any necessary adjustments to the template, such as adjusting the Air, adding Hotels, and/or Rental Cars (For instructions on adding each segment, see the instructions for <u>creating a template from scratch</u>).



When you are satisfied with your template, select "Save."

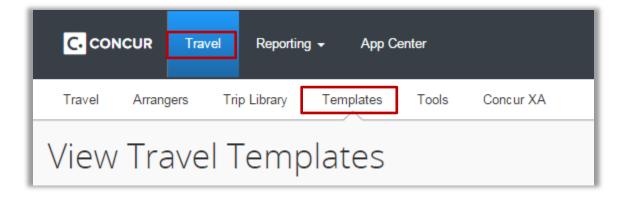


Your template can now be viewed and used to book via the <u>Templates Library</u>.

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<u>Creating a Template from another Traveler's Trip:</u>

Navigate to the "View Travel Templates" screen by selecting "Travel" then selecting "Templates."

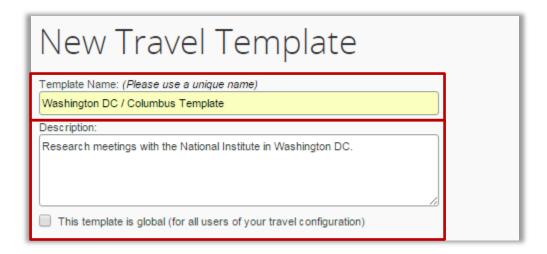


Select "[+] Add a New Template".



Give your Template a name, and brief description. Selecting the "This template is global" box will make this template available to all OSU users.

Important: If this template will be used for another traveler the "This template is global" box must be checked. If this box is not checked, the template owner will be the only person able to be booked using this template.



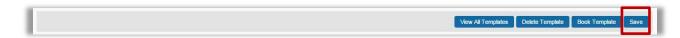
Under the "Start this trip template from:" section, select the "Record Locator" radio button, and input the record locator into the field. Then select "Next" and the system will begin compiling the info for your template.



Make any necessary adjustments to the template, such as adjusting the Air, adding Hotels, and/or Rental cars. See the instructions for <u>creating a template from scratch</u> for details on building your template.



When you are satisfied with your template, select "Save."

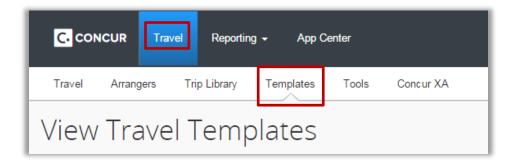


Your template can now be viewed and used to book via the **Templates Library**.

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Creating a Template from Scratch:

Navigate to the "View Travel Templates" screen by selecting "Travel" then selecting "Templates."

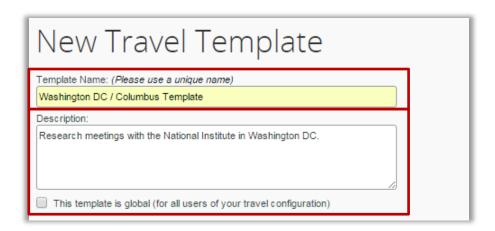


Select "[+] Add a New Template"



Give your Template a name, and brief description. Selecting the "This template is global" box will make this template available to all OSU users.

Important: If this template will be used for another traveler the "This template is global" box must be checked. If this box is not checked, the template owner will be the only person able to be booked using this template.



Under the "Start this trip template from:" section, select the "Start from an empty template" radio button, and then select "Next" to continue.

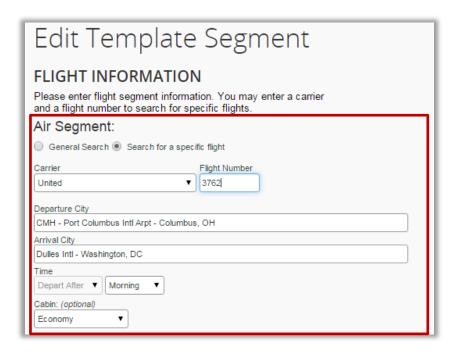


Begin building your template by selecting "Add Air."



You will add each air segment of your trip separately.

Put in the flight information for your first air segment, using either the "General Search" or "Search for a specific flight" radio buttons. If you select the "Search for a specific flight" you will have to provide an airline and flight number. The template will then only search for that specific flight when used.



When you are satisfied with your segment, select "Save."

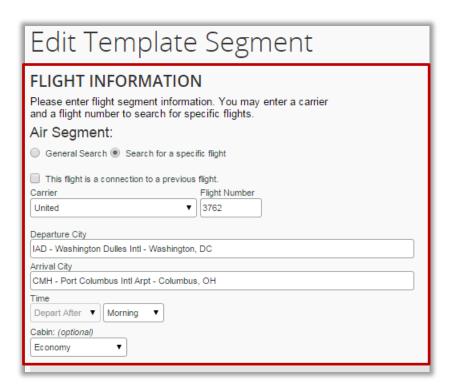


You will now see that segment added to your template.

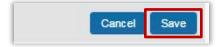


Select "Add Air" and repeat the step for your return flight, be sure you input the correct departure and arrival cities for the return leg.





Select "Save" when satisfied.



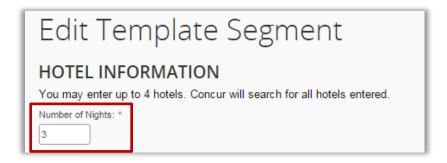
Review both air segments for accuracy.



If you would like to add a hotel, select "Add Hotel." Be sure you select the "Add Hotel" link under the appropriate segment.



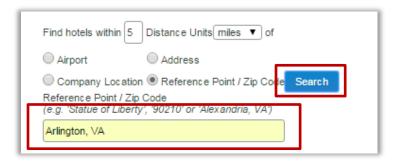
Input the number of nights you will be staying in the hotel.



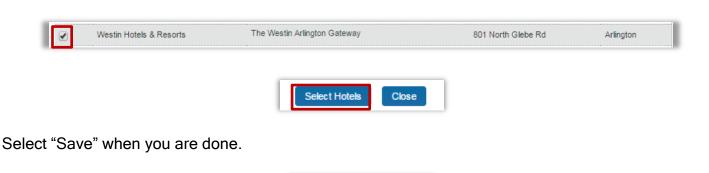
Select "Search for this hotel" to find a hotel. You may enter multiples if desired.



Enter your Search Parameters to locate the hotel, and then select "Search."



When you locate the hotel you want, select the check box, and then scroll to the bottom and select "Select Hotels."



Cancel Save

The hotel/hotels will now appear in your template.



To add a rental car to your trip template, select "Add Car." Be sure you select the "Add Car" link under the appropriate segment.



Select the Car Company, Car Type, and Number of Days for this rental.

CAR INFORMATION			
Please enter details about this car.			
Car Company	Car Type	Number of Days	
Enterprise ▼	Economy Car ▼	1	

Reminder: Enterprise and National are the preferred rental car suppliers for The Ohio State University. Utilizing Enterprise and National in conjunction with the OSU contract ensures that travelers receive OSU contract pricing, and meet OSU policy requirements for insurances when renting domestically.

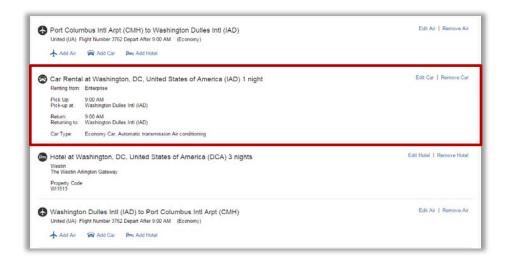
Complete the Pick-up, Drop-off locations and time sections.

Pick-up car at	Drop-off car at	
Airport Terminal Off-Airport Please enter an airport. IAD - Washington Dulles Intl - Washington, DC	Airport Terminal	
Please estimate when you want your car. If you have a flight on the same day as your pick-up or drop-off, we will automatically adjust the times to fit the flight.		
Pick-up Time Drop-Off Time Morning ▼ Morning ▼		

When you have finished making your selections, select "Save."



You should now see your Car Rental segment in your template.



Review your template, and make any edits or other additions. When you are finished and satisfied, select "Save" to save the template for later, or "Book Template" to book with the template.

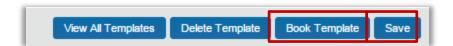
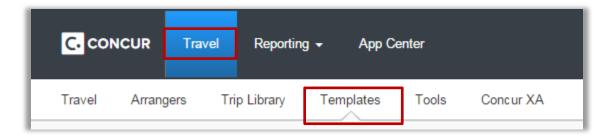


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Viewing and Booking Your Travel Templates:

To view your saved travel templates, select "Travel" then select "Templates." You will now be able to see any Personal Templates you or an assistant have created for you, as well as templates what are open to all OSU travelers.



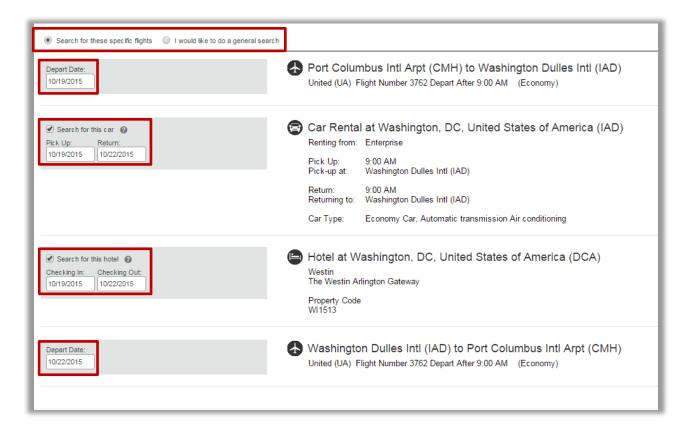
To Book a trip based off of a template, find the template you wish to use, and then select "Book."



Select the traveler for this trip. You will be able to book for yourself, a guest and any traveler who has assigned you as their Travel Arranger.



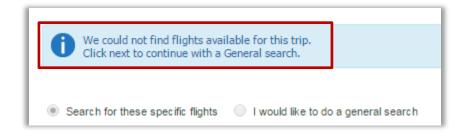
Input the dates of your trip, and select whether or not you want to search by specific flight numbers or not.



When you are done select "Next" to begin the search.



If you are searching by specific flight, and those flights cannot be found you will receive an error message. If this happens select click next again, to do a general search.

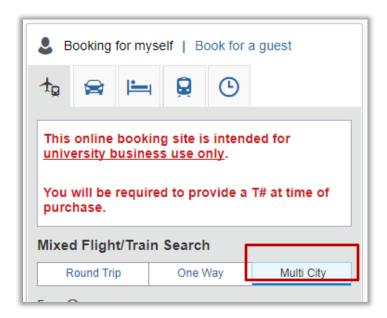


From this point, you will complete the booking process as normal. For more information see the training documents titled: Booking Airfare for Another Employee, Booking Airfare for a Guest, and Booking Airfare for Yourself. The documents can be found at https://osutravel.osu.edu/book-online/concur-reference/.

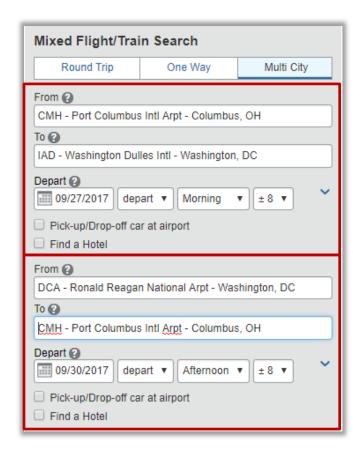
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In general, Agent Assist is the recommended method for booking complicated and multi-segmented (Multi City) trips. However, if desired, multi-segmented (Multi City) trips can be booked using Concur.

To begin booking a multi-segmented (Multi City) trip, select "Multi City" under the Mixed Flight/Train Search Section.



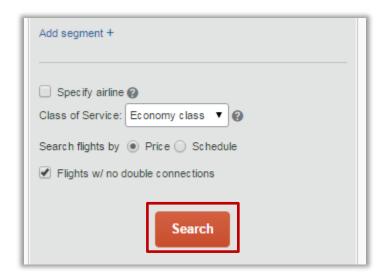
Enter the departure cities, arrival cities, and dates for each segment.



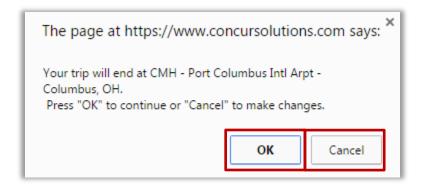
To add additional segments to your search select "Add segment +"



When you are satisfied with your selections, select "Search."

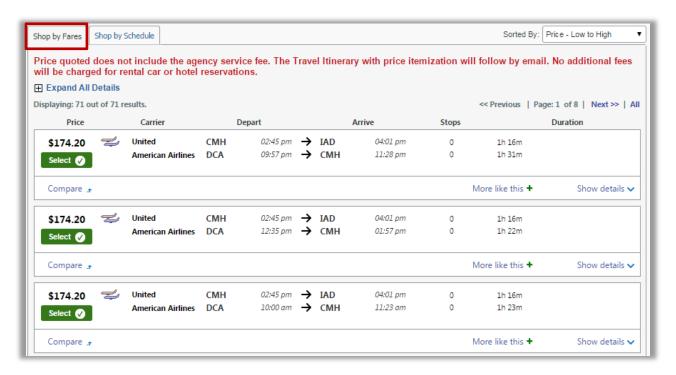


You will receive a popup warning asking you to verify the trip end city. Select "Cancel" to make edits as needed, or select "OK" to continue.

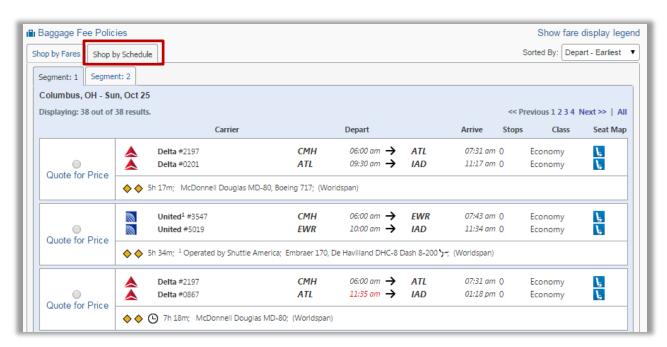


Searching under the "Shop by Fares" tab will automatically bundle flights for you, based on lowest fare. You are able to use the same sorting functions as you would while booking a traditional round trip flight. For more information see training documents titled: Booking Airfare for Yourself, Booking

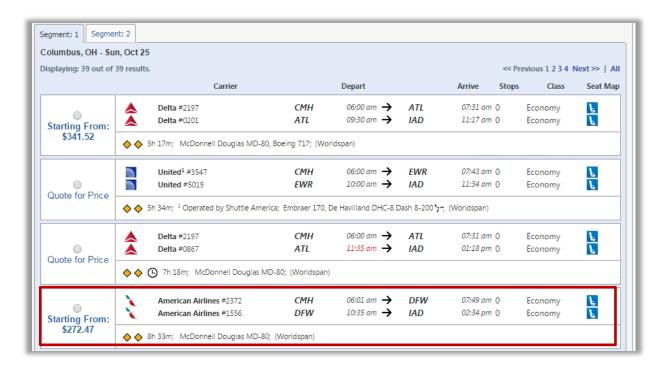
Airfare for Another Employee or Booking Airfare for a Guest located at https://osutravel.osu.edu/book-online/concur-reference/.



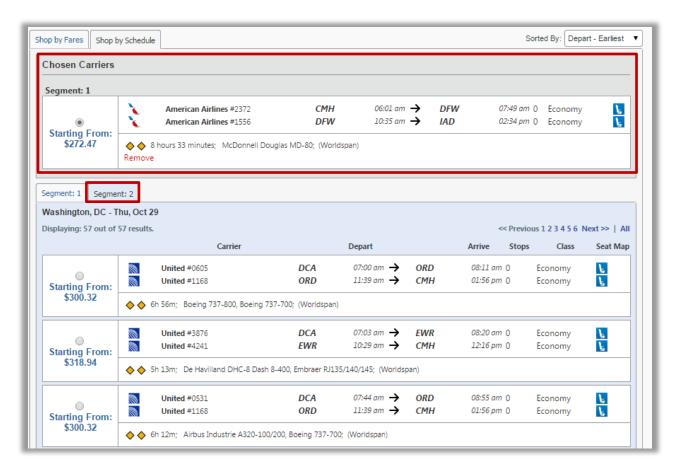
If you would like to select each flight segment individually, select "Shop by Schedule."



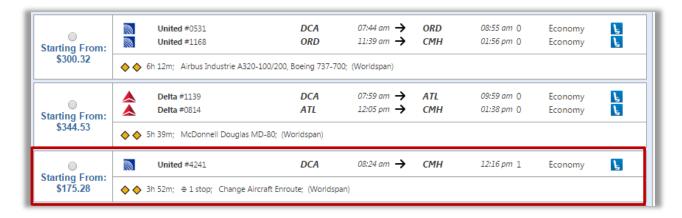
Locate the first segment flight you are interested in, and select the "Quote for Price" or "Starting From:..." radio button.



The selected segment will now appear under "Chosen Carriers" and the search tool will automatically display your "Segment: 2" options.

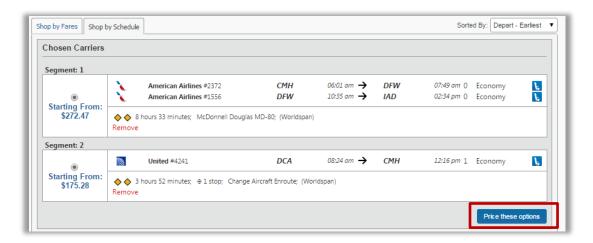


Locate the second segment flight you are interested in, and select the "Quote for Price" or "Starting From:..." radio button.

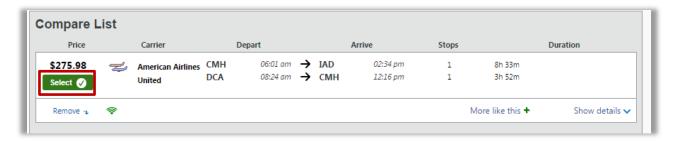


Repeat for any additional segments needed.

Each segment you have selected will show up under "Chosen Carriers." When you are satisfied with your segments, select "Price these options."



The selected flight quote will now appear under "Compare List." If you are satisfied with your flights, select the green "Select" button.



You will now complete the booking process per the normal process. For more information see the training documents titled: Booking Airfare for Yourself, Booking Airfare for Another Employee or Booking Airfare for a Guest located at https://osutravel.osu.edu/book-online/concur-reference/.

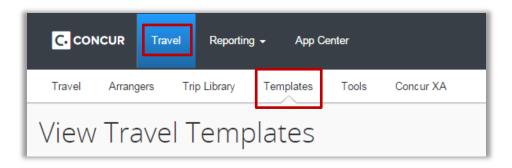
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Though Concur does not have the ability to search by specific flight number within the standard search function, this can be achieved by utilizing the template function.

To see a more general discussion of utilizing the template function, look here.

This portion of the guide will walk you through using a template to search for a specific flight number, on a specific airline.

Navigate to the "View Travel Templates" screen by selecting "Travel" then selecting "Templates."

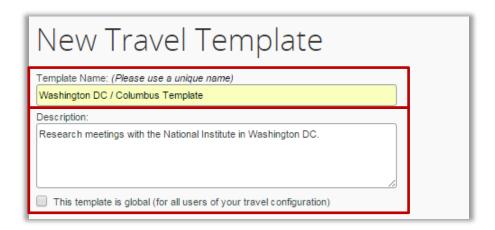


Select "[+] Add a New Template"



Give your Template a name, and brief description. Selecting the "This template is global" box will make this template available to all OSU users.

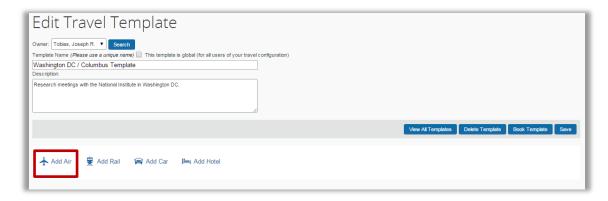
Important: If this template will be used for another traveler the "This template is global" box must be checked. If this box is not checked, the template owner will be the only person able to be booked using this template.



Under the "Start this trip template from:" section, select the "Start from an empty template" radio button, then select "Next" to continue.

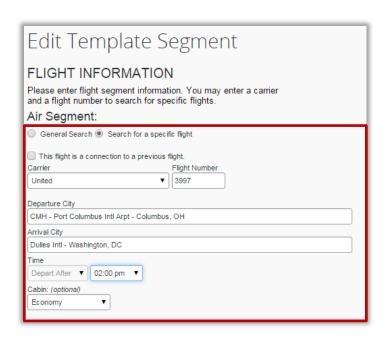


Begin building your template by selecting "Add Air."

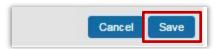


You will add each air segment of your trip separately.

Select the "Search for a specific flight" radio button, and then input the flight info you would like to search. Take care to ensure you select the appropriate hour for the flight you wish to book. In our example the requested flight departed at 2:45 PM so the 2 O'clock PM hour was selected. If you do not select the correct hour, the flight search will not return results.



When you are satisfied with your segment, select "Save."

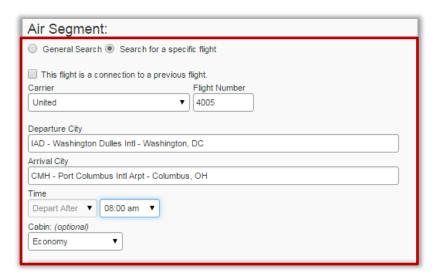


You will now see that segment added to your template.

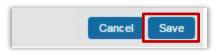


Select "Add Air" and repeat the step for your return flight, be sure you input the correct departure and arrival cities for the return leg. Again, take care to ensure you select the appropriate hour for the flight you wish to book. In our example the requested flight departed at 8:20 AM so the 8 O'clock AM hour was selected.

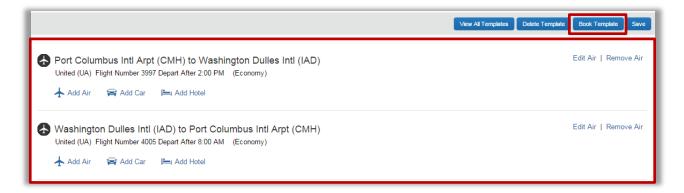




Select "Save" when satisfied.



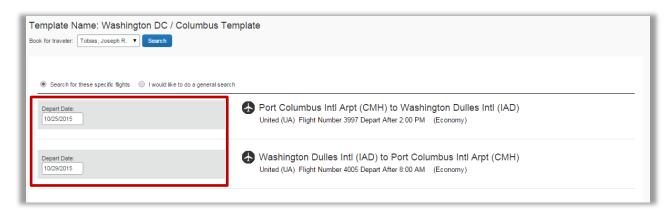
Review both air segments for accuracy, then select "Book Template" to begin the search with the template.



Select the traveler you are booking for, you will only be able to book this flight for another traveler if you previously selected "This Template is Global."



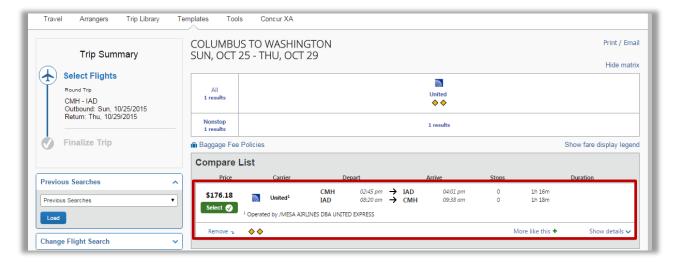
Input the dates of your trip, and select the "Search for these specific flights" radio button.



When you are done select "Next" to begin the search.



The template will then search for that particular flight(s), within the parameters that you specified. If the flight(s) is found, it will be listed on the search flights screen. From this point, you will complete the booking process as normal. For more information see the training documents titled: Booking Airfare for Another Employee, Booking Airfare for a Guest, and Booking Airfare for Yourself. The documents can be found at https://osutravel.osu.edu/book-online/concur-reference/.



If the flight is not available, you will receive the below message. If you believe the flight is available, but you are not able to find it contact a CTP agent for assistance.

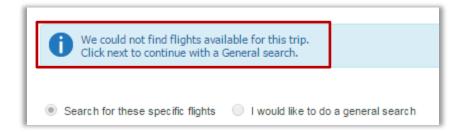


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