The Ohio State University

Booking Airfare for Another

Employee

Travel Office: Concur Job Aid

! IMPORTANT REMINDERS:

- Concur is for university business use ONLY no personal travel is permitted to be booked through Concur.
- An approved Spend Authorization (SA#) is required at purchase.
- Access to Concur is limited to employees only (no contingent or part time employee access).
- Your Concur access is based on the agency that supports your travel demographic in Workday:
 - If you are UNIV, OSUP, Health System = Concur with Corporate Travel Planners (Individual business travel)
 - If you are ATHLETICS = Concur with Anthony Travel (Athletics business travel)

If you have any questions, or need further assistance please contact the Travel Office at 614-292-9290 or travel@osu.edu.

Booking Airfare for Another Employee

IMPORTANT NOTE: Before booking airfare in Concur, there must be an APPROVED Spend Authorization issued from Workday to the traveler named for the dates booked. Do no recycle an old Spend Authorization or enter a fraudulent number to bypass <u>Travel Policy</u>.

<u>**!!Before login in to Concur!!</u>** Verify with the Employee (traveler) that you are set up as their Travel Assistant (Arranger) in Concur. For more information, see <u>Assigning Travel Assistant</u> job aid located at the <u>Travel</u> <u>website</u> under Training and Job Aids – Concur Booking Tool.</u>

- 1. Navigate to Concur located at the <u>Travel website</u>.
- 2. Click "Book Travel Online" icon
- 3. Login with OSU credentials (e.g., *name.#* and password) and respond to duo pass.
 - Based on your login credentials, you will automatically be directed to the appropriate OSU instance of Concur based on your primary assignment (University or Athletics).
- 4. Click **OK** at the Login Warning.



- Verify that all information in <u>your</u> Concur Profile is accurate and all required fields are complete. Click Profile in the upper right header of the Concur home page. Your name will be displayed based on your login. If all the information in your profile is complete and accurate, move to the next step.
 - For more information, see <u>Completing Concur Profile</u> job aid located at the <u>Travel website</u> under Training and Job Aids Concur Booking Tool.

- 6. You will now need to switch to the profile of the Employee (traveler) whose airfare you will be booking.
 - Go to "**Profile**" in the upper right-hand corner of the page.
 - Under "Acting as other user", enter the name of the Employee (traveler) in the search field for whom you will be arranging flights. You can search by firstname and lastname or employee ID.
 - When you identify the Employee (traveler), click on Start Session.

C. CONCUR Travel App Center			Help Profile + 💄
THE ORIO STATE UNIVERSITY Hello, Jacob		0)	Jacob W Weber Profile Settings Sign Out
RIP SEARCH	ALERTS	×	Acting as other user
Booking for myself Book for a guest	TripIt creates a schedule with all your travel details in one place. Simply connect your Concur account to TripIt. Connect to TripIt	CC 40	Tobias, Joseph R tobias.59@osu.edu (Email)
1 ² 🗃 🖿 😟 🕓	You haven't signed up to receive e-receipts. Sign up here	L	614-292-4186
This online booking site is intended for university business use only.	COMPANY NOTES		
You will be required to provide a T# at time of purchase.	Online Booking is available 24/7 Site navigational assistance – see HELP in upper right corner		

Note: If the traveler's name does not appear in search results, they have not yet assigned you as their Travel Assistant. For instructions on assigning a travel assistant, see <u>Assigning Travel Assistant</u> job aid located at the <u>Travel website</u> under Training and Job Aids – Concur Booking Tool.

7. Upon switching to Employee's (traveler) profile, the top right will change to green, displaying "Acting as..." and the name of the Employee (not your name).



- 8. Verify that all information in the **Employee's (traveler)** Concur Profile is accurate and all required fields are complete. Click Profile in the upper right header of the Concur home page. Your name will be displayed based on your login. If all the information in their profile is complete and accurate, move to the next step.
 - For more information, see <u>Completing Concur Profile</u> job aid located at the <u>Travel website</u> under Training and Job Aids Concur Booking Tool.

- 9. Under the **Trip Search** section, click the tab for Mixed Flight/Train Search.
 - Begin search by the default Round Trip (or change to One Way, or Multi City)
 - Enter Departure City and Arrival City.

***NOTE:** For Athletic Business Travel, the use of Concur is restricted for international travel. Contact a <u>full-</u> <u>service agent</u> for assistance with international bookings.

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SAP Concur C Travel Reporting	App Center	Profile 🔻
THE OHIO STATE UNIVERSITY		00 View Trips
RIP SEARCH	A_ERTS	
 Booking for myself Book for a guest Book for a guest 	Tripit creates a schedule with all your travel details in one place, accessible on Android or iPhone. Simply connect your Concur account to Tripit. Connect to Tripit Net right now	
This online booking site is intended for university business use only. You will be required to provide an approved SA# at time of purchase.	COMPANY NOTES Travel Guidelines for OSU Business Travel Effective July 1, 2021, the university will allow business-related travel in line with updated health and safety requirement continued focus on fiscal responsibility. Review the FY22 Travel Guidelines for the Travel Approval Process and more	ts and our specific details.
Mixed Flight/Train Search Round Trip One Way Multi City	Refer to the CDC Travel Guidelines for health, safety and risk responsibilities. Reference Guides:	
From () CMH - John Glenn Columbus Intl Airport - Columbus, OH Find an airport Select multiple airports	NY TRIPS (0)	Read mor
To 🕼 Arrival city, airport or train station Find an airport Select multiple airports	bu currently have no upcoming trips.	
Search		
Show More		

10. Enter Departure and Return Time.

 This feature allows you to specify what time the Employee (traveler) would like to depart or arrive for that airfare leg. You can search by a broad time frame (morning, afternoon) or by specific times. The dropdown box to the far right allows you to search on either side of the time you selected, based on the number of hours you choose.

04/06/2015	arrive	▼ 08:00 am	▼ ±2 ▼	~
	11.			
Datura O				

11. Once your search parameters are selected, click "Search" button.

- 12. After the search is complete, you will see a results matrix at the top of the page.
 - The matrix offers the ability to filter and refine the results by number of stops or airline (e.g., if we only wanted to view only the nonstop options, we would click "Nonstop").

COLUMBUS	, OH TO NEW - FRI, JUL 1	YORK, NY			Print / Email
.,,	,,,				Hide matrix
All 122 results	N United	American Airlines	A Delta	Southwest	≹ Multiple
	Preferred	Preferred	Preferred	Preferred	
Nonstop 43 results	467.23 9 results	511.26 12 results	913.08 12 results	_	576.20 10 results
1 stop 79 results	475.73 5 results	469.76 8 results	488.00 8 results	550.09 45 results	456.70 13 results
Show fare display	legend				Baggage Fee Policies

• The left panel offers additional options to filter and further limit your results (e.g., sliding the Depart and Return sliders allows you to find more specific options).

Trip Summary	THU, JUN 30) - FRI, JUL 1				Hide r
Round Trip CMH - NYC Depart: Thu, 06/30/2016	All 122 results	N United	American Airlines	A Delta	Southwest	💸 Multiple
Return: Fri, 07/01/2016		Preferred	Preferred	Preferred	Preferred	
Finalize Trip	Nonstop 43 results	467.23 9 results	511.26 12 results	913.08 12 results	-	576.20 10 results
	1 stop 79 results	475.73 5 results	469.76 8 results	488.00 8 results	550.09 45 results	456.70 13 results
Change Search	Show fare display	legend				Baggage Fee Po
Depart - Thu, Jun 30	Shop by Fares St	top by Schedule			Sorte	ed By: Price - Low to High
Depart 08:00 A - 05:00 P Arrive 07:37 A - 10:35 P	 Price quoted do will be charged Displaying: 122 do 	es not include the a for rental car or ho out of 122 results.	agency service fee. The T tel reservations.	ravel Itinerary with price it	temization will follow by	email. No additional fee
Return - Fri, Jul 1	Delta	08:13a	CMH → 12:01p E	WR 1 stop DTW	3h 48m	¢456.70
Depart 07:00 A - 09:47 P	🗧 🔲 🔊 Unite	d 05:29p	EWR → 07:20p C	MH Nonstop	1h 51m	\$456.70
•	- III III			1.		

After you have found the selection that meets the Employee's (traveler) business need (within <u>Travel</u> <u>Policy</u>), click on the blue **Select** button displaying the price for that flight.

American Airlines '		10:20 pt ODE	11.04	Ch 27m	Main Cabin s 220.14	Main Cabin Flexible \$318.14
COS.51 PM CIVIH	\rightarrow	10.26 PM ORF	TLGA	611 37111	Select	Select
08:14 рм ORF	\rightarrow	11:50 рм СМН	1 CLT	3h 36m		
¹ AA 4604 / AA 474 AA 5214 operated	6 operate by PSA	ed by REPUBLIC AIRWA AIRLINES AS AMERICA	YS AS AMERICAN N EAGLE	I EAGLE,		
Proformed Airling			More	e fares/details 🗸		

NOTE: If you encounter fares with yellow warning symbols, these selections may have rules that prevent purchase in Concur (e.g., Frontier) and must be booked through a full-service agent; or are basic economy fares that come with limitations that may not be ideal for business travel.

- 14. Next, you will be routed to the **Review and Reserve Flight** page to review your selection, verify traveler information, select seats (when permitted by the airline) and select the desired payment method.
 - Verify that your flight selection meets your needs.

R	Review and Reserve Flight				
RE	EVIEW FLIGI	HTS			
	DEPART	🛪 Thu, Jun 30 - Columbus, OH to	Newark, NJ		Hide details ^
	Thu, Jun 30	08:55a CMH → 10:38a EWR	1h 43m	United #4334 View seats / Embraer RJ135/140/145	
	RETURN	🛠 Fri, Jul 1 – Newark, NJ to Colum	ibus, OH		Hide details \wedge
	Fri, Jul 1	05:29p EWR \rightarrow 07:20p CMH	1h 51m	United #3748 View seats / Embraer RJ135/140/145	

• Verify that your information as primary traveler appears correctly. If this information is not correct, you can change it in your Concur Profile. **This should not be your name.**

ENTER TRAVELER INFORMATION Ensure all traveler information below is correct.	
PRIMARY TRAVELER	Edit Review all
Name: Brutus O Buckeye Phone: 614-292-9290 buckeye.1@osu.edu ▼	

• Review the Price Summary to confirm total cost of your airfare. This is subject to change at the discretion of the airline until the purchase is complete.



 Select Method of Payment from the drop-down. In most cases, you should be selecting the AIRFARE PREPAYMENT card to bill the transaction to OSU directly. Alternatively, you can use the Employee's (traveler)personal credit card by clicking Add Credit Card. PCards should not be used to purchase airfare.

SELECT A METHOD OF PAYN To comply with the Ohio State University Travel	IENT Policy, an approved Spend Authorization/SA# is required to finalize purchase.
AIRFARE:	
Select the AIRFARE PREPAYMENT car	d to reduce personal out of pocket expenses (An APPROVED Spend Authorization/SA# is required
 For business travel only. 	
 For all OSU business funding sources (U 	JNIV, Health System AND OSP/Sponsored).
Do not use a Department or Individual P	Card for airfare purchases
HOTEL: • There are no OSU credit cards loaded for	or hotel reservations.
 To book a hotel reservation, OSU busine 	ess travelers must add a personal credit card or PCard (see Add credit card link below).
How would you like to pay?	
Please choose a credit card. V 👔 Add c	credit card
Please choose a credit card.	
AIRFARE PREPAYMENT* (1329)	
VI4/15 XXXX XXXX 8734 (8734)	

• Once all information is entered and verified, click "Reserve Flight and Continue" to reserve your tickets.



NOTE: The flight is <u>only</u> reserved at this point. It will NOT be ticketed until you fully complete the booking process. Pricing is subject to change at discretion of the airline until the purchase is complete.

15. Next, on the **Travel Details** page, you are given an opportunity for final review.

- If you would like to send or print a copy of your reserved trip, select "Print Itinerary" or "Email Itinerary".
- Note the day and time the reservation will expire if the booking process is not completed.



• Once you have completed your final review, you are ready to complete the booking. Scroll to the bottom of the page and click on the blue "Next >>" button.

If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.	
Next >> Cancel	

- 16. Next, on the **Trip Booking Information** page, you will enter the final requirements to complete the booking and purchase the airfare.

 - Indicate if any unused tickets in your profile should be used by selecting either "No unused tickets" or "Yes unused ticket applies"
 - All other fields are optional (exceptions may apply for Athletics)
 - It is helpful to note how long the system will let you hold your reservations without booking the ticket. If you have not completed the booking process by that time, your trip will be cancelled.

Trip Booking Information
 The Itinerary Summary and Confirmed/Ticketed emails will follow completion of this booking by clicking Next>> (below) and following any additional prompts.
Reservation may be held by clicking 'Hold Trip' button below. Note the time available for HOLD below.
 To comply with university policy, an approved SA# will be required to finalize purchase (see SA# field below).
The trip name and description are for your record keeping convenience.
Trip Name Trip Description (optional) This will appear in your upcoming trip list. Used to identify the trip purpose
Trip from Columbus to Chicago
Send a copy of the confirmation to:
Send my email confirmation as OHTML OPlain-text
Please provide a valid/approved SA# for travel (example SA-####################################
You may HOLD this reservation until: 02/09/2023 12:55 am Eastern
Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled. Display Trip Hold Trip <<< Previous Next >> Cancel Trip

- Once you have completed all required fields and are ready to finalize the booking. Scroll to the bottom of the page and click on the blue "Next >>" button to proceed.
- 17. After selecting "**Next** >>", you will have one last time to review all your selections and entries. Verify that all the details are accurate, and when you have confirmed your itinerary, scroll to the bottom of the page and select "**Purchase Tickets**".

Almost done Please confirm this itinerary. Display Trip << Previous Purchase Ticket>> Cancel Trip

• You will then be directed to a confirmation page, where you can make note of the agency assigned Trip Record Locator.



- Within minutes, you and the Employee (traveler) should receive an email with the subject "Summary Itinerary or Travel Reservation", confirming the booking was received by the travel agency. At that point, the trip will go through a quality control process at the contracted agency, and then be ticketed.
- 18. A second email from the contracted agency with the subject "Confirmed/Ticketed or Electronic Invoice" should arrive within 1-2 hours stating that the Employee's (traveler) airfare has been <u>ticketed</u>. This is the final itinerary and is considered the airfare receipt that will be uploaded to the Expense Report in Workday.

If you and the Employee (traveler) do not receive this final email within 2 hours, <u>contact</u> the agency to check the status.