

Booking Airfare for Yourself

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)
 - o If you are ATHLETICS = Concur with Anthony Travel (Athletics business travel)

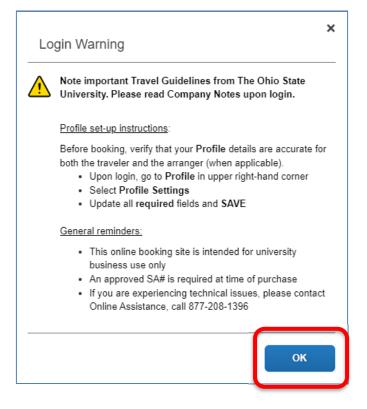
If you have any questions, or need further assistance please contact the Travel Office at 614-292-9290 or travel@osu.edu.

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IMPORTANT NOTE: Before booking airfare in Concur, you must have 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 Travel Policy.

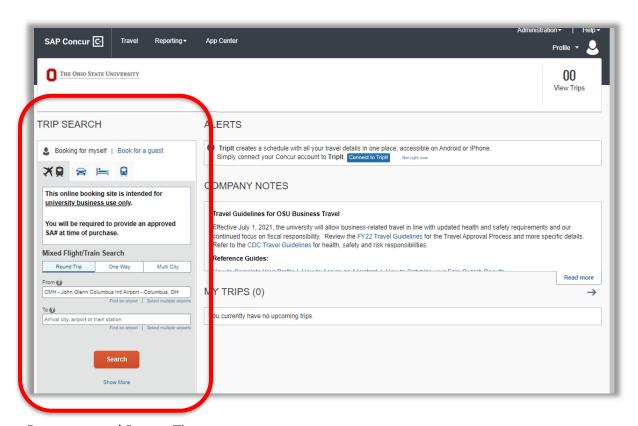
- 1. Navigate to Concur located at the Travel website.
- 2. Click "Book Travel Online" icon
- 3. Login with OSU credentials (e.g., *name.#* and password) and respond to duo pass.
 - Based on your login credentials, you will automatically be directed to the appropriate OSU instance of Concur based on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



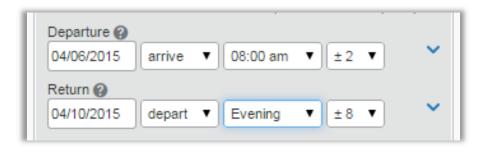
- 5. Verify that all information in your Concur Profile is accurate. Click Profile in the upper right header of the Concur home page. Your name will be displayed based on your login.
 - If all the information in your profile is complete and accurate, you are now ready to book your flight.
 - For more 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. 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-service agent</u> for assistance with international bookings.



- 7. Enter Departure and Return Time.
 - This feature allows you to specify what time you would like to depart, or what time you would like to 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.

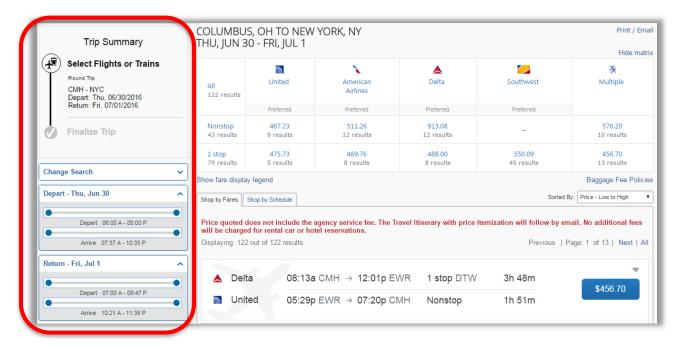


8. Once your search parameters are selected, click "Search" button.

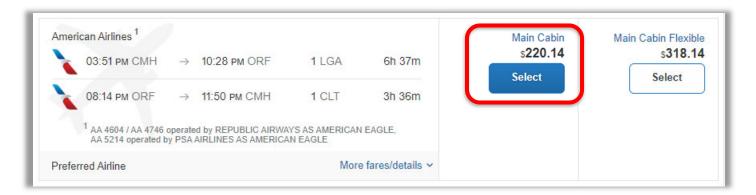
- 9. After the search is complete, you will see a results matrix at the top of the page.
 - The matrix offers the ability to filter and refine the results by number of stops or airline (e.g., if we only wanted to view only the nonstop options, we would click "Nonstop").



• 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).

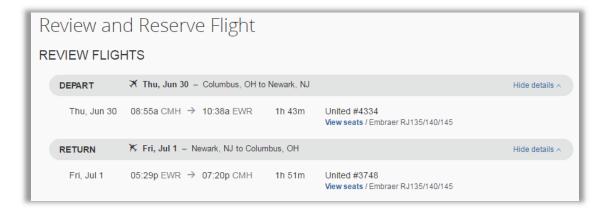


10. After you have found the selection that meets your business need (within <u>Travel Policy</u>), click on the blue **Select** button displaying the price for that flight.



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.

- 11. 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.



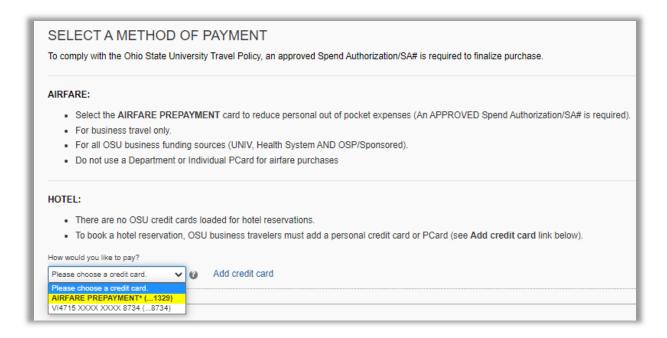
• Verify that your information as primary traveler appears correctly. If this information is not correct, you can change it in your Concur Profile.



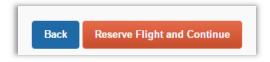
Review the Price Summary to confirm total cost of your airfare. This is subject to change at the
discretion of the airline until the purchase is complete.



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 your
own personal credit card by clicking Add Credit Card. PCards should not be used to purchase
airfare.

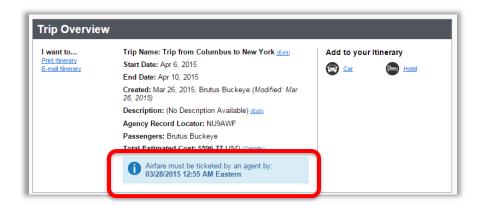


 Once all information is entered and verified, click "Reserve Flight and Continue" to reserve your tickets.

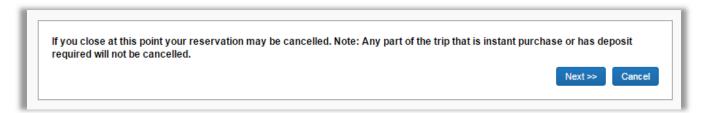


NOTE: Your flight is <u>only</u> reserved at this point. It will NOT be ticketed until you fully complete the booking process. Pricing is subject to change at discretion of the airline until the purchase is complete.

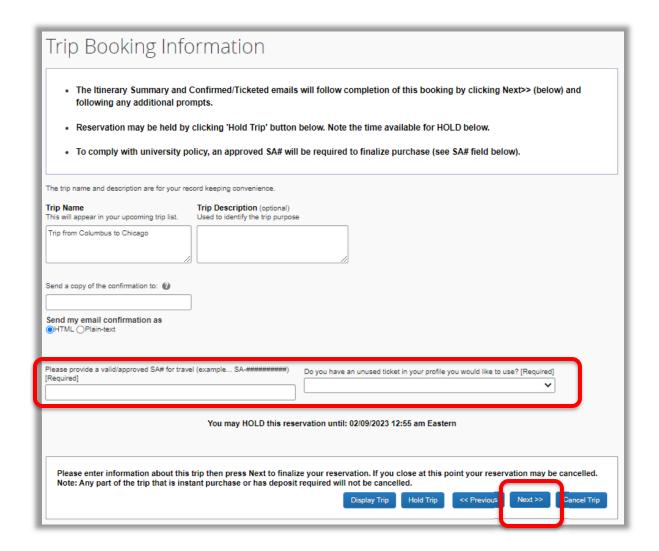
- 12. Next, on the **Travel Details** page, you are given an opportunity for final review.
 - If you would like to send or print a copy of your reserved trip, select "Print Itinerary" or "Email Itinerary".
 - Note the day and time your reservation will expire if the booking process is not completed.



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



- 13. Next, on the **Trip Booking Information** page, you will enter the final requirements to complete the booking and purchase the airfare.
 - Provide approved SA# (Spend Authorization issued from Workday) using the format SA-######## (10-digits)
 - 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.



- Once you have completed all required fields and are ready to finalize your booking. Scroll to the bottom of the page and click on the blue "Next >>" button to proceed.
- 14. 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".



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

Finished!

You have successfully booked your trip!

Trip Record Locator: 4LOCZW

- Within minutes, you 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.
- 15. A second email from the contracted agency with the subject "Confirmed/Ticketed or Electronic Invoice" should arrive within 1-2 hours stating that your airfare has been <u>ticketed</u>. This is your final itinerary and is considered your airfare receipt that will be uploaded to the Expense Report in Workday.

If you do not receive this final email within 2 hours, contact the agency to check the status.