SAP Concur Travel:
Book Airfare and Lodging

Use this guide to help you make airfare and lodging reservations via Concur Travel.

Accounts Payable & Travel

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Overview
The SAP Concur Travel online booking tool delivers the broadest selection of travel content through an intuitive and easy-to-use online travel booking experience. Both the SAP Concur Travel and SAP Concur Expense modules allow for travel to be all inclusive for employees, students, and non-employees of Texas State University. This also allows for an all-encompassing system for travel preapproval, booking travel reservations and the reimbursement process once the trip is complete.
The following instructions will guide the user through the reservation process of airfare, lodging and in some cases car rental (if booking car rental only, refer to Tx State Car Rentals).

Corporate Travel Planners (CTP) is the University’s preferred vendor for airfare and lodging purchases. When booking your reservations, the SAP Concur Travel system will submit all reservation information to CTP for final ticketing, reservation, and invoicing. CTP will then transfer booking information to the SAP Concur Expense system; this allows for ease of the reimbursement process once your trip is complete.

If you need on-line navigational assistance at any time during the booking process, you may call Corporate Travel Planners (CTP) toll free at 877-727-5188. Operational times for this free service is 8:00 AM – 5:00 PM M-F Central Time. **NOTE:** If you need help after hours, you may still call 800-823-6582 but you will incur an afterhours booking fee.

Pre-Booking Requirements
- Travel Requests must be fully approved before airfare/hotel/rental vehicles can be booked.
- Only valid and correct trip numbers should be used when making reservations (e.g., 334P).
- Travel Requests should have sufficient funds encumbered to cover the costs.
- Reservation dates must match the approved Travel Request.
- Destinations must match the approved Travel Request.
- Travel Assistants should not book any airfare other than coach. Please refer to RSS 072618A.

➢ The following Login Warning will pop up. Read through for University guidelines and SAP Concur directions and select OK. **NOTE:** This message will change with any updated information.
1. Once in SAP Concur Travel, the homepage will appear.

2. Any unused tickets will be listed under the **Alerts** tab.

3. It is the Traveler’s responsibility to monitor any travel warnings when traveling to a foreign country. Click the **Travel Warnings** box to view notifications.
4. The **Company Notes** section includes Travel Office resources and information about ConfermaPay, On Call International the University’s duty of care provider, Concur contact information, CTP contacts and Travel Office quick links.

### COMPANY NOTES

**Concur Training Resources**
This link will provide information to utilize the Concur Travel System.

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**Welcome to Concur Travel!**

**An Approved Travel Request is required before booking.**

Before your trip begins
- **Know your travel allowances:** Business Travel UPPS 05.06.05
- **Access any Texas State Travel Forms needed.**
- **Review the Pre-Trip Reference guide.**

**Corporate Travel Planners (CTP)**
The University’s preferred vendor for airfare and lodging reservations.

- **CTP Hours of Operation:** 8:00am - 5:00pm CST
- **CTP After Hours:** 5:01pm - 7:59am CST

**Hotel Payment**
- If booking hotels in Texas, provide the [Hotel Occupancy Tax Exemption Certificate](#) to the establishment.
- Access your virtual hotel payment with the ConfermaPay App.
  - Register with your university email
  - For ConfermaPay App troubleshooting, please email: [https://help.conferma.com](https://help.conferma.com)

**Car Rentals**
- If booking a rental vehicle ONLY, please follow the instructions at [TX State Car Rentals](#).

**Concur Reservation Assistance**

- For Concur Travel Assistance please call **877-208-1396**.
- For Full Service Reservation Assistance please call **800-623-9036** or **210-366-9565**.
- For Assistance with Group Reservations please call **800-810-2695** or **210-530-0857**, or you can email groups@ctptravelservices.com.
- **After Hours Toll Free Number** **800-823-6582**.
  - Please note there is a charge for after hour calls.
5. Select **Travel** from the top left of the homepage.

Booking Reservations

1. Determine what combination of travel is required (e.g., airfare, rental car, lodging or rail)

2. Under TRIP SEARCH, select one of the following options: **Round Trip, One Way, or Multi City**.
3. If only booking one travel type, select the proper icon (e.g., plane, car, bed, or train) to begin the booking process for the type of travel needed. 
   **NOTE:** If booking car rental only, refer to [Tx State Car Rentals](#). **Rentals booked through Concur will be personally paid by the traveler.**

4. If booking airfare plus rental vehicle and/or lodging, click the plane icon and you will be prompted to book a rental vehicle and or lodging as you flow through the booking process. No need to return to the initial screen to begin each individual reservation.

**Booking Airfare and Lodging**

**Airfare**

1. Enter Departure City. Beginning with the city name or airport’s three-digit code and a listing will begin to populate to narrow the search. Scroll down the list and click on the correct airport.

2. Enter Arrival City. Beginning with the city name or the airport’s three-digit code and a listing will begin to populate to narrow the search. Scroll down the list and click on the correct airport.
3. Enter the dates of travel to search for reservation availability.
   a. Enter the date or select from calendar drop down.

4. Enter the Departure and Return times.
   a. The time preference can be changed to either departure or arrival (e.g., want to arrive at 12:00PM).
   b. Select to view options up to +/- 9 hours from the time selected.

5. Check the appropriate box to Find a Hotel to reserve lodging.
6. For lodging, you may enter your distance from one of the locations listed: Airport, Address, Company Location or Reference Point.
   a. The location selection defaults to Airport if booking airfare and hotel together. The arrival city/airport will prepopulate from the airfare section. You may also begin typing the city name or the airport’s three-digit code for a listing to populate to narrow the search. Scroll down the list and click on the correct airport.

   ![Image of a hotel search interface](image1.png)

   b. If attending a conference or visiting a company and you want to stay at the conference or a particular hotel, click Address and enter the exact address of the location in the Reference Point/Zip Code field.

   ![Image of an address search interface](image2.png)
c. For a broader search, enter **Reference Point /Zip Code**.

![Input field for Reference Point/Zip Code](image)

- **Find a Hotel**
- **Search within** 5 miles from
- **Airport**
- **Reference Point / Zip Code**
- **Company Location**

**Reference Point / Zip Code**
(e.g., Statue of Liberty, 90210 or Alexandria, VA)

- **Only show results showing**
- **Dallas, TX**

- **Only show results containing**: Hilton.

![Pop-up for address confirmation](image)

f. A pop up will appear to confirm the address entered if using search with Address. Select **Choose** if correct.

![Pop-up for location confirmation](image)
7. If requesting to book lodging, a warning regarding Tax exemption will pop up when reserving hotels within Texas. This box will not pop up if you are booking lodging outside of Texas.

**REMEmber for Texas hotels:**

- The traveler (employee) is required to present a completed Texas Hotel Occupancy Tax Exemption Certificate to the hotel upon check in.
- The traveler must verify the state occupancy tax was not charged on the final hotel statement at check out.
- If the state occupancy tax is charged, the traveler must ask the hotel to remove it immediately and obtain a revised hotel statement before they leave the hotel.
- If the traveler is a non-employee, the Travel Assistant must email or fax the completed exemption certificate to the hotel.
- The traveler must obtain a hotel receipt with hotel charges, tax itemization, and method of payment.

Click on the following link for the certificate: Texas Hotel Occupancy Tax Exemption Certificate. You only need to complete the Guest Name, Hotel Name, sign and date for the hotel to comply with the exemption. Travel Assistants may sign the certificate for non-employees.

**REMEmber for Out of State:**

- The traveler must obtain a hotel receipt with hotel charges, tax itemization, and method of payment.
- If the traveler is a non-employee, the Travel Assistant is responsible for obtaining the hotel receipt.

a. Click for the Texas Hotel Occupancy Tax Exemption Certificate form if needed. Click Continue to proceed with booking lodging.

**NOTE:** If lodging in the State of Texas, it is the traveler’s responsibility to present the exemption form at check in and verify at check out that state tax was not charged on the hotel bill.
8. Once selection on this screen is completed, click the orange **Search** at the bottom of the screen.

NOTE: The **Search by** feature allows the booking to be searched by a specific carrier or refundable airfare only.

9. The system will take a moment to load the flight selections.

   a. An informational notation will pop up for travel requirements. Click **OK** once read.
10. The Air Matrix, located at the top of the Search Results page, is a way to sort flights by the airline (columns) or by number of stops. The Matrix can be hidden by selecting Hide matrix and re-displayed by selecting Show matrix.

11. A grid of flight options and prices will be displayed based on your preferences. Review the grid and select the Departure flight.
12. After selecting the **Departure** flight, a grid of return flight options and prices will display. Review the grid and select the **Return** flight.

13. Once roundtrip flight selection is complete, the Selected Fare will appear and any choices outside of University policy will appear as warnings.
   a. Click on the warning icon ⚠️ to view what policy is referenced.
   b. Click **Remove** to change flight selection.
c. After roundtrip flights are selected, the flights and the total airfare for the trip will be displayed. Click on **View Fares** to continue.

d. A list of flight and fare options will be displayed for comparison in the **Shop by Fares** window.
NOTE: Select airlines such as Frontier offer “instant purchase airfares.” If this option is used, the ticket purchase is instantly processed after acknowledging the instant purchase related to the chosen flight. Any cancellations, changes or refunds will need to be processed through the carrier.

NOTE: You will be prompted to “Choose a Reason” when booking airfare $100.00 or more over the lowest available option. Once you have chosen a reason, select “Save” to continue.
14. Review and Reserve Flights

NOTE:
- If you have a frequent flyer program set-up in Concur, it will either auto-populate, or you will have the option of adding one at this stage of the reservation.
- A personal credit card cannot be used to pay for airfare, rail, lodging, or rental vehicle (when available). Only the company credit card is allowed for payment. The payment screen shown below will default with the data for airfare.
a. After reviewing these, click on the **Reserve Flight and Continue** button. By continuing, you agree to the fare rules and restrictions, and hazardous goods policy.

![Image of Reserve Flight and Continue button]

b. If you click the blue **Back** button, it will take you back to the outbound flight grid options. You will then need to repeat the process to change flights.

**Lodging**

1. The location of the arrival flight will populate in the Location entry, if not, you may have to use the drop down for the location.

   e. Choose the applicable county to calculate the current GSA rate for that location.

![Image of Location drop down]

2. Once a location is entered, click **Next**.

![Image of Hotel Per Diem Locations]

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**This is a Non-Refundable Ticket**

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier’s system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.
3. A grid of available hotel rooms based on your preference will be displayed.

   ![Hotel Rooms Grid]

   **NOTE:** This process is for **business lodging only**. If extending travel for personal days, book the personal lodging reservation separately and use a personal credit card to reserve the room.

4. Locate the hotel to book. Click on **View Rooms** and then select the room type to move forward with booking. A grid of available room types will be displayed.

   **NOTE:** If the hotel requires a deposit to hold the room, verify you need to stay at that hotel or if you can book another hotel. Some hotels do not refund deposits if the reservation is cancelled. Click on **Rules and cancellation policy** to verify.

   ![Rules and Cancellation Policy]

5. Click on the **blue dollar amount** button for the lodging to reserve.

6. Review the hotel reservation.
7. Enter any special hotel accommodations.

8. Name and phone number will populate from your profile.

9. Price summary will be available.

10. Method of Payment will default to Direct Billed.
11. Review the details and cancellation policy. Check the box next to **I agree to the above rate rules, restrictions, and cancellation policy** and select **Reserve Hotel and Continue**.

12. Review the Travel Details
13. If satisfied with the trip details, click the blue **Next** button.
   a. If not satisfied, click the blue **Cancel** button to cancel the entire trip (all reservations).
   
   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.

   **OK**  **Cancel Trip**

   www.concursolutions.com says
   Cancellation at this time will remove this entire reservation.
   
   Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.
   
   Are you sure you wish to do this?
   
   **OK**  **Cancel**
c. Cancellation confirmation will appear.

14. Trip booking information.

   a. Enter the **Trip Name** (Optional).
   b. Enter the **Trip Description** (Optional).
   c. Enter any **Comments for the Travel Agent** (Optional). Use this field to enter preferences such as booking a conference rate hotel (to ensure you get the conference room rate). If no preferences are in your profile (or they are not available during the booking process from the vendors) add them in this field such as seating in the airplane; if the hotel only offered two double beds and you want a king bed; room away from elevator/ice machine, etc. **This might incur a fee.**
d. In **Send a copy of the information to:** (Optional) enter the email address of where you want this information sent (e.g., Travel Assistant, home email, etc.). **You can add multiple email address by entering a Semi-colon (;) between the email addresses.**
   
   **NOTE:** Travel Assistant email information may already be included in your profile and if so, you would not have to enter that address here.

e. You will click on the preferred method button of how to send your email confirmation under the above field. **NOTE:** Defaults to HTML.

f. Enter the **Travel Request Number** (e.g., 334P). This is a required field, and you will not be able to continue without entering the number. Ensure enough funds have been encumbered to cover these reservations costs. You may also want to include costs for the meal per diems and any incidentals if applicable.

g. Select Yes or No from the drop-down menu in the **Do you have an unused ticket in your profile field** (Required). If you selected Yes, CTP applies any applicable unused ticket residual value to the cost of the current airfare ticket.

h. Click on the appropriate blue button at the bottom of the **Trip Booking Information** screen:

   - Click on Display Trip to view detailed trip information.
   - Click Hold Trip to hold the trip reservation without purchasing the airfare. Certain restrictions will apply based on the rules and regulations specific to airfare.
     
     i. Using CTP provides an additional airline benefit to keep in mind when using Southwest Airlines. The length of the hold will be displayed in the airline’s Rules and Restrictions information, which you must agree to when confirming the ticket.
   
   **NOTE:** Fares are not guaranteed until tickets are issued and are subject to change without notice.

h. Click on the **Previous** button to go to the previous screen.

   **NOTE:** Never use the Back button on your browser or you will lose everything.

i. Click on the **Next** button to view detailed trip information and complete the final airfare purchase and rental vehicle and/or lodging reservation if applicable.

j. Click on the **Cancel Trip** button to cancel the entire trip except for any instant purchase airfare.
Trip Confirmation

a. Click on the blue **Purchase Ticket** button to complete the purchase of your airfare and reserve rental vehicle and/or lodging if applicable.
   
   NOTE: Rental vehicles booked through Concur will be personally paid by the traveler.

b. If not satisfied, then click the blue **Cancel Trip** button to cancel the entire trip (all reservations).

c. Confirm cancellation by clicking **OK**.

d. Cancellation confirmation will appear.

   Your trip has been successfully cancelled.
Trip Overview

- The trip itinerary will be displayed with the Confirmation Number and will be sent to the email addresses you have indicated. The Travel Office also receives a copy of the itinerary.
- The trip is now confirmed, and these charges will be paid directly by Texas State University.

NOTE: Lodging is company billed in a different manner. Lodging will be company paid using a single use virtual credit card specific to the lodging establishment, traveler and the lodging reservation dates (business lodging only). Please refer to the Hotel Virtual Card FAQs for more info.

Multi Segment Travel

Multi Segment Travel encompasses trip reservations with multiple stops along one route. This is mainly seen for a foreign destination. Not all price listings are the same in the booking tool compared to what an agent can book. **NOTE:** Consider using an agent to book these types of trips to ensure you are getting the best price possible, and itineraries are correct.
Booking on behalf of another Traveler

**NOTE:** You must be listed as a Travel Assistant/Arranger in order to book travel for another. Refer to the [SAP Concur Travel: Updating your Profile](#) instructions for more information.

1. Once in SAP Concur Travel, the homepage will appear.

2. From the Profile drop down click on Act on behalf of another user.
3. Type in the user’s name or NetID in search field and select the user confirming the name or NetID.
4. Verify the name and NetID are correct.

5. Select Start Session.

6. Once the profile has been selected, the screen will convert to Acting as (NAME).

7. Refer to SAP CONCUR TRAVEL Homepage to continue with booking procedures.
Reminders:

1. If you have lodging expenses you will need to verify the lodging expenses on the folio before you leave the hotel.

2. Once you return from the trip, you will complete the Expense Report with the company paid charges. An itemized receipt for the transaction will need to be attached.

3. If lodging was in the State of Texas, remember that it is the traveler’s responsibility to ensure that the State Occupancy Tax was not reflected on folio. If so, you will need to contact the hotel and request a credit to the credit card billed for this tax (you may need to provide the exemption form again per the hotel’s request).

4. Lodging reservations booked in SAP Concur will be included on your Expense Report, claim these charges as **University Paid**.