Booking Travel in Concur Quick Reference Guide

Last Updated: 10/08/2020

This QRG provides the steps for travelers and/or delegates to book travel and complete the Travel Request in Concur Travel and Expense.

Prior to travel, please reference the current travel guidelines in order to ensure you are compliant during COVID-19. You must have a travel waiver if you are traveling outside of Indiana. Please state in the comment section of the Report Header that a waiver has been approved.

The Current Travel Guidelines that are posted on the Protect Purdue website, should be reviewed both prior to travel and during travel due to COVID-19. Return to campus guidance is available when your out-of-state travel is complete.

Contact Anthony Travel 24/7 for any unexpected circumstances or last minute changes to travel arrangements by calling 765-496-TRIP (8747).

Jump Links: Log in to Concur, Search for Accommodations, Flight Results, Car Rental Results, Hotel Results, Segment Itinerary, Request Header, Cash Advance, Segments, Allocations, Attach Additional Documentation, Submit, Report Review, Notifications

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**Log in to Concur**

Go to the OneCampus portal.

Choose Travel System (Concur).

Log in using Purdue Career Account ID and BoilerKey passphrase.

Click Login.

If creating on on behalf of another traveler, click Profile.

www.purdue.edu/employeeportal
Under **Administer for another user**… select user name from drop-down menu, or search by entering name.

Click **Apply**.

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**Search for Accommodations**

Before booking travel, know the following:

- University rules regarding travel
- All funding source accounts paying for the trip
- Trip or conference details
From Concur Home page, book trip using **Trip Search**.

1. Click the **Round Trip, One Way** or **Multi City** tab.
2. Enter **Departure City**.
3. Enter **Arrival City**.
4. Enter **Departure date and time window**. 
   **NOTE**: When searching, the time window defaults to ±4, this can be changed up to a window of ±9 hours.
5. Enter **Return date and time window**.
6. Select **Pick-up/Drop-off car at airport** checkbox. To reserve car without returning all possible car rental options, mark **Automatically reserve this car** checkbox.
7. Select the **Find a Hotel** checkbox, for hotel accommodations. For discounted group or conference rates, do not mark this checkbox, instead book using Travel Card directly with hotel or conference.
8. Using the **Class** drop-down, choose economy class unless flying business class for medical or other approved exception that is on file in the Business Office.

Click **Search**.

### Flight Results

A summary of flight results are displayed in a table above details results.
Flight results, by default, display by Schedule.

To view outbound and return flights by cost, click Shop Fares.

When booking by Schedule, the Departure and Return flights are selected separately.

If booking by Fares, click Show Details to view equipment, layover, and other detailed flight information.

For information regarding Fly America Act restrictions, visit the Purdue Travel site at: http://www.purdue.edu/business/travel/Transportation/Air_Travel/airfaretravel.html#usflag.

Flights results are color-coded.
- **Green** indicates that the rate meets University policy.
- **Yellow** indicates that the rate is not the best available within University policy.
- **Grey** indicates that the rate does not meet University policy.
If search results do not yield adequate flights, edit search options using the tool bar located on the left side of page.

Click **Select** to choose flight.

If booking a yellow coded rate, select appropriate code from the drop-down menu and provide sufficient explanation.

**NOTE:** The following air carriers are immediate purchase:
- JetBlue
- Southwest
- AirTran
- Frontier
Review flight details and select any frequent traveler programs for selected carrier.

Read fare rules and restrictions.

To accept, click Reserve Flight and Continue.

To select new flight, click Back.

**Car Rental Results**

A summary of car rental results are displayed in a table above details results.

For details on negotiated discounts see the National and Enterprise Rental Cars page of the Travel website.

Details are displayed below table.

Car rental results are color-coded.

- **Green** indicates that the rate meets University policy.
- **Yellow** indicates that the rate is not the best available within University policy.
Click **Select** to choose rental car.

If booking a yellow coded rate, select appropriate code from the drop-down menu and provide sufficient explanation.

Review car rental details and select any frequent traveler programs for selected carrier. **NOTE:** For National, enroll in the **Emerald Club** program.

To accept, click **Reserve Car and Continue**.

To select new car, click **Back**.
**Hotel Results**

Review the Hotel Per Diem Location and Lodging Rate. Best practice when selecting lodging is to stay within double the listed amount for any location’s nightly rate.

Click Next>>

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Review the hotel results.

By default, the results are sorted by Distance.

Locate hotel in relationship to place of business on map provided.

Click choose room.
Click **View Rooms** to see available rates.

Click the blue price button that corresponds to preferred room type.

If booking a rate with a warning, select appropriate code from the drop-down menu and provide sufficient explanation.

Review lodging details and select any frequent traveler programs for selected provider.

Read **Rate Details** and **Cancellation Policy**.

To accept, mark **I agree to the above rate rules, restrictions, and cancellation policy** checkbox and click **Reserve Hotel and Continue**.

To select new hotel, click **Back**.
Segment Itinerary

The ability to change, edit or cancel reservations can still be made at this time using the links to the right of the segment details.

Other segments can still be added by clicking the segment icon options.

The itinerary appears in sections or segments.

Outbound airfare to the destination appears first.

Review outbound flight details, including seat location.
Review rental car reservation details.

Review lodging arrangements and potential fees.

Review return flight details, including seat selection.
Review total estimated cost of trip for pending reservations.

<table>
<thead>
<tr>
<th>Total Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Air</strong></td>
</tr>
<tr>
<td>Airfare quoted amount:</td>
</tr>
<tr>
<td>$424.19 USD</td>
</tr>
<tr>
<td>Taxes and fees:</td>
</tr>
<tr>
<td><strong>Air Total Price:</strong></td>
</tr>
<tr>
<td><strong>Hotel:</strong></td>
</tr>
<tr>
<td><strong>Car:</strong></td>
</tr>
<tr>
<td><strong>Total Estimated Cost:</strong></td>
</tr>
</tbody>
</table>

Restrictions

Quote: NONREF/SV/CHG/PLS/AREDFIX/0 FLT TIME OR NO VALUE
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

Read reminder text and click Next>>.

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.

Enter Trip Name.

NOTE: This is the name as it will appear on the trip itinerary received by email from Concur as well as how the trip will be displayed on the Trip List.

Click Next>>.

Trip Booking Information

Please select next at the bottom to complete your trip

The trip name and description are for your record keeping convenience. If you have any special requests for the travel agent, please enter them into the agent comments section.

Trip Name
This will appear in your upcoming trip list.

Hotel Reservation at HOUSTON, TX, USA

Comments for the Travel Agent (optional)
Special Requests may incur a higher service fee.

Send a copy of the confirmation to

Send my email confirmation as

Travel itinerary details appear one last time. Verify all reservations are correct.

Click Confirm Booking>>.

Almost done... Please confirm this itinerary.

Request Header

Complete Required Fields
*Highlighted with red line or heavy left bar.

Request JD9R

Request Name: Hotel Reservation at HOUSTON, TX, USA

Request Email: [email]@purdue.edu

Traveler: [Name] [Email]

Department: [Department]

Purpose of Travel: [Purpose]

In this trip being paid for by the traveler: [Yes] [No]

Method of Payment: [Method]

Accounting: [Account]

[Additional fields and options]

[Form fields and options]
<table>
<thead>
<tr>
<th><strong>Request Name</strong></th>
<th>Department/FirstInitial.LastName/Destination/Conference/FirstDateOfTravel</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traveler Type</strong></td>
<td>Select: Employee (EMP)</td>
</tr>
<tr>
<td><strong>Travel Type</strong></td>
<td>Select One: In State, International, International - Under Warning, Out of State. <strong>NOTE:</strong> If travel type is International or International – Under Warning, list all cities and countries that will be visited in the Comment box. For a list of countries with travel warnings, visit the Department of State website at: <a href="http://travel.state.gov/travel/cis_pa_tw/tw_1764.html">http://travel.state.gov/travel/cis_pa_tw/tw_1764.html</a>. Risk Management provides insurance for all International travel.</td>
</tr>
<tr>
<td><strong>Purpose of Travel</strong></td>
<td>Select best option from drop-down menu. <strong>NOTE:</strong> When option related to research is selected, the purpose of research is required in the Comment box.</td>
</tr>
<tr>
<td><strong>Is this trip being paid for by Purdue?</strong></td>
<td>Select yes or no.</td>
</tr>
<tr>
<td><strong>Preapproval Required</strong></td>
<td>Default selection is None. <strong>NOTE:</strong> When selecting None and the trip does not include a flight upgrade or cash advance, the request is auto-approved. Most trips do NOT require pre-trip approval. However, if the funding source for the trip is from any of the areas listed, or is mandated by department head, select the appropriate item. If travelling internationally on ARO, AID, EPA, USDA, State Sponsored or Foreign Gov’t funds, select appropriate drop-down. If travelling on DOE Lab or funds that have been defined by the sponsor as requiring pre-trip approval, select appropriate drop-down. <strong>NOTE:</strong> When selecting all other options: 1. The fiscal approver is required to approve the travel event. 2. Sponsored Programs accesses a report outlining travel details. Sponsored Programs will notify fiscal approver within 48 hours, if alterations are required for travel arrangements or travel should be cancelled. For a list of Sponsor Defined pre-trip approval requirements, see <a href="#">Sponsored Programs with Travel Restrictions/Requires Sponsor Approval</a>.</td>
</tr>
<tr>
<td><strong>Departure Date</strong></td>
<td>Populated by booking.</td>
</tr>
<tr>
<td><strong>Return Date</strong></td>
<td>Populated by booking.</td>
</tr>
<tr>
<td><strong>Personal Travel</strong></td>
<td>List any dates to be used as personal time. <strong>NOTE:</strong> If the personal time exceeds 3 days, the following applies: Domestic Travel – Airfare reimbursement is capped at $400. International Travel – Must submit a Cost Comparison.</td>
</tr>
<tr>
<td><strong>Travel Companion</strong></td>
<td>List names of other employees, spouse, or other individuals who will be traveling with you.</td>
</tr>
<tr>
<td><strong>Flight Upgrade</strong></td>
<td>Defaults to No; if Yes, select reason from drop-down. Selecting a flight upgrade requires the employee’s direct supervisor’s approval.</td>
</tr>
</tbody>
</table>
For more pre-trip approval details see Approval Workflow.

**NOTE:** If selecting Medical Disability or Medical Need, ensure approved exception is on file in the Business Office.

### Vehicle Use
Select qualification from the drop-down list.

### Account Assignment
- **Account Assignment** is a required field.
  - Click in the Account Assignment text box.
  - The CODE radio button is selected by default.
  - Type an asterisk (*), followed by the Order or WBS Element number, excluding any leading characters such as ‘F.’ or ‘C.’
  - or-
  - Search by TEXT
  - Change the radio button to TEXT and type an asterisk (*) followed by the account name (Football).

**NOTE:** When travel is paid by more than one source of funds, use the primary (most restrictive) account assignment. If all accounts are equally restrictive, list the account that is paying for majority of cost. Multiple funding sources can be identified using allocations on segment details.

If correct account assignment is unknown, click **Save** and refer to departmental business office or the job aid they provided.

### Extension of
Select other Travel Request name if this request is in addition to another.

### Comment
Enter any comments relevant to this request.

**NOTE:** If traveling out of state, a travel waiver is required to be approved prior to booking travel. Please make a comment in the Comment box if a travel waiver has been completed and approved prior to booking.

![Travel Waiver Request Form.docx](Travel Waiver Request Form.docx)

### Cash Advance
- Cash Advance requires fiscal approval of the cost center indicated in the Account Assignment.
- Cash Advance Amount: If requesting a cash advance greater than the $500 available through Visa Travel Card, enter the desired amount. Make sure USD is in the currency drop-down.
- Cash Advance Comment: Provide an explanation regarding the use of funds.
- Purpose: List a detailed description of the cash advance and how it will be used.
### Travel Start Date
First day of travel.

### Travel End Date
Last day of travel.

## Segments
Segments contain all pieces of the reservation made within Concur such as airfare, rental car, and lodging. Segments can also be made manually for any arrangements that have been booked outside Concur.

Select the **Segments** tab.

<table>
<thead>
<tr>
<th>Request Name: Trip from Indianapolis to Houston</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Header</td>
</tr>
</tbody>
</table>

Review existing segment information.

To add a segment, click:
A. Air Travel
B. Car Rental
C. Lodging
D. Taxi Fare
E. Care Service Reservation
F. Railway Ticket

Complete all required information, noted with a red bar.

Click **Save**.

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Page 15 of 18
In order for all funding source Fiscal Approvers to receive appropriate notifications, all additional funding sources must be identified by allocating segments. Not providing allocations will result in lack of notification to other funding sources.

Within the segment, click **Allocate** to apply allocations necessary.

Allocate by **Percentage** or **Dollar Amount** and enter appropriate account assignments for each allocation.

Click **Save**.

**Attach Additional Documentation**

If a need exists to attach additional documentation to the Travel Request, click **Attachments** and select **Attach Documents**.

Click **Browse...**
Select document from the Choose File to Upload window.

Click Open.

Click Upload.

Click Close.

Submit

If arranging travel for yourself, click Submit Request.

If arranging travel on behalf of someone else, click Notify Employee.

NOTE: The traveler must submit his/her own Travel Request.

Review the Request Submit Agreement.

Click Accept & Submit.
Trips are automatically booked and tickets purchased unless they require approval and are actively rejected by the Fiscal Approver in the Concur System.

**Report Review**

Sponsored Programs will review funding source report within two business days of receipt.

To deny travel on specified funds, notification is given to the fiscal approver of the funding source listed in the header **Account Assignment**.

SPS approval is required for foreign travel on all SPS funds except NSF and NIH. SPS also reviews and approves funding if one of the following applies to travel request:

- ARO (International Only)
- DOE Lab
- AID (International Only)
- EPA (International Only)
- USDA (International Only)
- State Sponsored (International Only)
- Foreign Gov't (International Only)
- Sponsor Defined

SPS approval of foreign travel on NIH and NSF funds has been delegated to the fiscal approver.

Risk Management will view reports for all international travel and process appropriate insurance forms.

Traveler will receive Insurance Identification Card, if travelling outside the 50 region United States.

The Insurance Identification Card is delivered by email prior to travel.

If the card is not received within one day prior to departure, contact the **Risk Management Department**.

**Notifications**

A Concur generated email request for approval is immediately sent when pre-trip approval is required. Once approved, a notification report is generated outlining trip details and forwarded to:

- Traveler’s supervisor
- Fiscal Approver of all funding sources
- Traveler
- Traveler’s Delegate – *Only if the delegate created the travel request.*