



Booking Travel Via Concur Quick Guide To Access Concur: [Click Here](#)

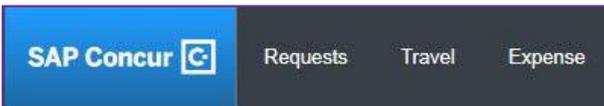
What is Concur?

Concur is a comprehensive web-based tool that integrates travel request and expense reporting with a complete travel booking solution for higher education business travel. Concur allows for the electronic processing of the following:

- Travel Reimbursements via EFT or Mail
- US Bank Travel Ghost Card Transactions (airfare)
- Domestic & International Travel Approvals

Concur Modules

Concur includes three modules which should be used to perform different types of activities in the system.



Travel Request is required to obtain preapproval of your travel prior to making any travel reservations and complete an Expense Report.

Concur Travel should be used to book airfare, car rental reservations, and hotel reservations through the University's travel management company (TMC), Christopherson Business Travel (CBT) by using the online booking tool or booking directly with a CBT agent.

Expense Report is required to request reimbursement for out-of-pocket expenses, and to reconcile any university paid transactions including US Bank Travel Ghost Card transactions.

Booking Travel via Concur

You can use the Online Booking Tool in Concur or call a CBT Agent to book airfare, hotel reservations, and car rental reservations. Booking Travel via Concur is not mandatory.

➤ Benefits booking travel via Concur:

- ✓ By booking via Concur, CSU contracts and rates apply, as well as CSU policies integrated within the system.
- ✓ The online booking tool is integrated within the Concur module creating a one go-to place for travel request, travel booking, and expense reporting.
- ✓ SF State has designated CBT agents who are trained specifically to assist SF State travelers.
- ✓ Incentives: The more we all use CBT, the better our negotiated rates will be.
- ✓ View every itinerary ever booked, securely store travel profile information, membership numbers and preferences to streamline booking your travel.
- ✓ CBT will manage, and ensure reuse of your unused tickets/credits.

Completing User Profile

- If Booking travel via Concur, you will need to complete all required fields in your User Profile under **Profile > Profile Settings**. Required fields include **middle name, phone number, Gender** and **Birthdate**.
 - Please complete any optional information as well to make the most out of the online booking tool.
- **Travel Preferences** – add travel preferences so after you book your travel, a CBT Agent can complete your travel reservation based on any travel preferences indicated.

Travel Assistant/Arrangers

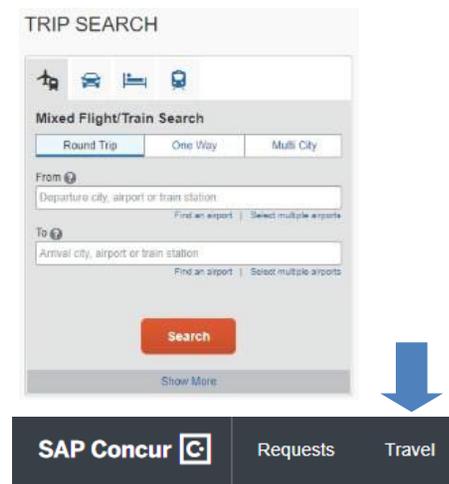
You can delegate another employee Travel Arranger permissions to allow them to book travel via Concur on your behalf.

1. To add a Travel Assistant/Arranger, go to **Profile > Profile Settings > Assistants/Arrangers** of your User Profile.
2. Click **Add an Assistant**.
3. Add the Employee's name you want to delegate.
4. Click either "**Can book travel for me**" – can only booktravel. Or, "**Is my primary assistant for travel**" – can book travel, update User Profile, and receive emails in regards to your travel. Then **Save**.
5. In order to make someone a Travel Assistant/Arranger, you must also add them as a **Delegate** for Travel Request/Expense.

Booking Travel

- An approved Travel Request is required in order to book travel via Concur.

Once your Travel Request is approved, simply book your travel using the **Trip Search** on the Concur Homepage or **Travel** tab.



Booking Airfare

- Your name in Concur (Primary Name) is the name used to book your flight. If your name is not identical to what's on your Driver's license/Passport, please book airfare outside of Concur or change your primary name with HR.
- For any flights with a price 20% greater than the lowest cost airfare, the system will display a warning icon next to the blue reserve button. This means the flight is out of compliance.
 - Reason and justification are required at the time of booking any travel that is out of compliance. An approved Authorization for One-Time Exception form may be required in order to get full reimbursement.
 - The US Bank Travel Ghost Card will be charged for airfare when booking via Concur. Once posted, the transaction including E-Receipt will appear under **Available Expenses** to later add to your Expense Report.

Booking Hotel

- To guarantee a hotel reservation, a credit card must be added to your User Profile. Card will not be charged and credit card will need to be provided at the time payment.
- Hotels that offer government rates will show if available. Please confirm with hotel that they accept State government and not just Federal.
- If the hotel nightly base rate is greater than **\$275**, attach an approved Authorization for One-Time Exception form to your Expense Report prior to submission for full reimbursement.
- If a conference is offering room block rates, please book directly with conference and not in Concur as that special rate may not be available.

Booking Car Rental

All Car Rental reservations should be booked through SF State's preferred vendors, Enterprise or National.

- Rental up to an intermediate size vehicle is allowable under the CSU Travel Procedures. Larger vehicles may be allowable if there is a no-cost upgrade provided or if the recommended sizes are not adequate to meet the business purpose of the trip.
- A **matrix** of all car options including car type, amount, and vendor will appear. Preferred vendors – Enterprise and National will be listed. Availability based on your search criteria.
- You do not need to add a credit card to your User Profile in order to book a car rental reservation. However, you will need to provide a credit card at the time of car pick up.

For any car reservations made with a car type above intermediate or with a non-preferred vendor, a warning icon will appear next to the blue reserve button. This means the car rental reservation is out of compliance.

- Reason and justification is required at the time of booking any travel that is out of compliance. An approved Authorization for One-Time Exception form may be required in order to get full reimbursement.

Booking Travel by calling a CBT Agent

If you prefer to book your travel by phone, you can call one of our CSU dedicated CBT agents. Additional service fees may apply.

- In order to make a reservation over the phone, you need to have an approved Travel Request in Concur.
- Please provide the **Request ID** of your approved Request to the Agent. The **Request ID** can be found at the top of your Travel Request. It can also be found under **Requests > Manage Requests** and next to the **Request Name** you will see **Request ID**.

Cancelling Travel

If you need to cancel a reservation you made through Concur:

1. Click the **Travel tab** at the top of the Concur Homepage. Then, click **Upcoming Trips tab**.
2. Under **Action**, click **Cancel Trip**.

You can also contact a Christopherson Business Travel Agent. They can cancel all or any part of your reservation.

- Cancellation rates may apply depending on the vendor's cancellation policy.
- Any credits received for airfare will be stored and maintained within Concur.

CBT Contact Information

For questions regarding travel reservations or changes to air that has already been ticketed, or to make a travel reservation, please contact a Christopher Travel agent:

- **Hours:** 5:00 AM – 6:00 PM – Monday – Friday
- **Dedicated Agent Group:** 800-285-3603
- **Email:** csu@cbtravel.com
- **Emergency After Hours Service:** 800-960-7862

For Concur Travel technical questions, contact Christopherson's Online Support:

- **Hours:** 7:00 AM – 5:00 PM – Monday – Friday
- **Online Support:** 888-535-0179
- **Email:** onlinesupport@cbtravel.com

❖ For Questions:

Please contact **Financial Services– Accounts Payable**

<https://www.csum.edu/fiscal-services/concur.html>

Email: CMA-AP@csum.edu