



**Implementation of Travel Management Services
and
Cliqbook Demonstration Video Transcript**

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Note: Since there is continual improvement on the Cliqbook System, you may find that the location of features may slightly change. Also, see the "Cliqbook Travel How To Guide" (PDF) at <http://www.caltravelstore.com>.

(Kelly May begins speaking) Hello! Welcome to the CALtravelstore Implementation and Cliqbook Demonstration. I'm Kelly May, and I'm Tasha Wilson ***(Tasha introduces herself)***, and we're here with the Department of General Services Statewide Travel Program. Thank you for joining us today! Today's webinar will include a brief overview of the new single travel agency concept and a demonstration of the online booking tool, Cliqbook.

As you are aware, the state is in a fiscal crisis and the Department of General Services (DGS) is charged with ensuring that when state employees travel on state business, they do so in the most cost-effective manner. The DGS believes that by utilizing a single travel agency, we can achieve this goal by reducing travel costs, while also providing consistency and transparency. The DGS will be able to provide government travelers with a one-stop shop for routine travel arrangements which include hotel accommodations, rail reservations, shuttle arrangements, rental cars, and airline reservations, as well as international and group travel.

(New Slide: Travel Program Directive FY 10/11)

First, we are going to provide you with a little background of the history of the Statewide Travel Program. In 2002, the state had 157 travel agencies; we dwindled that number down to 22 travel agencies and now we have one travel agency for the State of California that is authorized to provide travel services. We went out to bid in January 2010 for our RFP (Request for Proposal) for a travel management service provider which resulted in a contract with one travel agency, TravelStore.

TravelStore is formerly known as Patterson Travel. TravelStore has been doing business with the state for over 22 years. TravelStore takes pride in its excellent customer service and has provided travel services to many state agencies for the last 22 years. We also have an on-site branch located at the Ziggurat. We have 6 travel agents (*currently 7 travel agents*) and one on-site travel manager that is available to assist with full service reservation needs. We also have a 2-year contract agreement effective April 2010 through April 2012. We do have the option to renew this contract for 3 additional one-year terms.

(New Slide: Why)

For those of you that are wondering about why we decided to do this, we received feedback from our 2009 Travel Green Conference Tradeshow, as well as numerous meetings and travel forums that the state has put on. We received comments about best practices, time savings, money savings, a one-stop shop: a place where you could book all your travel and make the travel arrangement process more centralized and easier.

We also received recommendations from the Little Hoover Commission and the California Performance Review, as they were looking to centrally manage their travel expenditures for air, car, hotel, and to avoid incurring costs that were higher than necessary.

We were also looking to provide consistency, accountability, transparency, and to reduce travel costs by establishing one Travel Management Service provider.

As you see today with the technology out there with our BlackBerrys and iPhones, we are looking to provide an end-to-end system that includes expense, online travel booking, and other automated processes for government travelers. We are actually working with the State Controller's Office and CalAters to provide an end-to-end solution, from the minute that you book your trip all the way through to the end, through the travel reimbursement process.

This new initiative or process has two different phases. The first phase is that state departments will continue to use SWABIZ. SWABIZ is the online booking tool and portal for Southwest Airlines. All other airlines with contracted rates, such as United, Jet Blue, Virgin America, and Alaska Airlines, will be booked through Cliqbook. The Cliqbook website will also be used to book car and lodging reservations.

In Phase Two, which we are anticipating for early 2011, SWABIZ will be incorporated into Cliqbook, and you will be able to view all of your airlines in one location.

(New Slide: Benefits)

One benefit of the Cliqbook online booking tool and CALtravelstore is the one-stop shop. We have numerous travelers who can spend anywhere from 20 minutes to an hour trying to find a hotel in a particular area, find a state-contracted fare or going through the entire booking process. As a result, we wanted to have one central location where travelers could go for all of their travel needs.

Another benefit provides cost savings for the State of California.

The program allows for an enforceable travel policy environment so throughout the Cliqbook website, you will see per diems for lodging, all of our contracted rates and fares for airlines, and contacted rates for Enterprise and other car rental vendors.

There are also the emergency travel accommodations. TravelStore will provide a 24-hour after-hours service for travelers so if you don't have access to the internet and you are stranded or you need to make a change to your ticket, you can call in after 5 o'clock and speak with a live agent who will assist you with your travel reservation.

TravelStore is also providing iBank reporting. iBank is an online reporting tool with over 120 standard reports so you can access travel data and monitor your travel spends and a big portion of it will come with the reconciliation process for accounting to be able to reconcile the American Express BTA (Business Travel Account) statements.

iBank also offers a traveler 24/7 ID Report which is great if you ever happen to be on a plane that had to land in the Hudson River or there was an earthquake in Southern California, you could go online and print a report and find out where exactly your travelers are at any time giving immediate access to the location of all of our travelers, if there did happen to be an emergency or natural disaster.

Cliqbook is also able to report the carbon emissions for airlines so as we get into the demonstration you will be able to see the carbon emissions/greenhouse gas emissions omitted into the environment once you take that flight from Sacramento to L.A. or L.A. to Sacramento. We do have some departments that actually have to report their carbon emissions before they are even approved to travel. So we find that is a great nuance to the state to have that data.

There's also various maps to hotels from the airport and driving directions so you don't have to go to separate websites to get that information.

(New Slide: Cliqbook Demonstration)

This is the new official travel portal for the State of California so when you are a Travel Program Coordinator or a traveler, this is the website that you will use to book all travel for government business. *(clicks on the www.caltravelstore.com link.)*

(New Screen: CALtravelstore Home Page)

As we go into this link, we will walk you through the website a little bit. Here is our home page here which provides some information about the Statewide Travel Program and those entities that are invited to participate with our website listed below.

(New Screen: CALtravelstore Information)

I'm going to click on the **CALtravelstore** tab. As mentioned, CALtravelstore does have on-site agents that are available 8 a.m. to 5 p.m. Monday through Friday and here we have listed the six travel agents *(currently seven)* and the manager. All the way at the bottom, you will find the main telephone number which is the number you would call in if you did need to speak with an agent. *(clicks on the **DGS** tab)*

(New Screen: DGS Information)

Here is some information on the Department of General Services, some of the benefits of doing this, and our contact information which is listed below. Now I'm going to click on the **Helpful Travel Links** tab.

(New Screen: Helpful Travel Links)

We are trying to create a website where you have all of your links to resources available to you. Prior to booking your trip, you may need to fill out an **Excess Lodging Form** or if you know you are going to rent an oversized vehicle, we have our **Car Justification Form**. We also have the **Hotel Transient Occupancy Tax Form** and there are other links for our **Statewide Travel Program**, **DPA**, and **CalAters**. Then we have some other neat travel links further to the bottom; we have **Airport Maps**, **Airport Parking**, **Online Check-In**, **Passport Information**, **Transportation Security Administration** requirements, and other travel policies.

As you will see all the way to the right, you have a few different logins. First is the **Cliqbook login**, and again, Cliqbook is where you are going to book non-Southwest and non-SWABIZ reservations, car rentals, and lodging. If you are booking SWABIZ, there is the **SWABIZ login** that will take you to **SWABIZ.com**.

Then there is the **iBank login** for reporting and this will be the access for the Travel Program Administrators and Accounting staff.

We also have a **Cliqbook Travel How to Guide** which is a PDF version. This will actually walk you through on how to set up your profile and book a reservation if you do get stuck in the process or need some assistance.

Now I'm going to click on the **Cliqbook login**.

(New Screen: Cliqbook Login)

So for this demonstration, we are going to log into Cliqbook. Your **User Name** is going to be your **State of California email address** (*enters her User Name*), and you will assign yourself a **Password** (*enters her Password and clicks on Login*) once your department receives your links to go online and set up your Profile.

(New Screen: Cliqbook Travel Center)

We are working with your department Travel Coordinators or your Accounting Manager for your department to get each department, office or board set up. If you have any questions feel free to call us or you can also work with that individual (*Travel Coordinators or your Accounting Manager*) and see where you are at in the process. I am going to turn it over to Tasha and she is going to begin to walk you through on how to set up your Profile.

(Tasha Wilson begins speaking) Hello Everyone. Thank you very much for joining us! The first thing we are going to do is pop into your **Profile** (*clicks on Profile tab on Concur Homepage*) and we'll make sure all your preferences are set up.

You will notice that there are quite a few fields in the Profile but don't be overwhelmed by the amount of fields to fill out. What you'll actually be looking for is anything that says they are required; so you can pretty much enter just a few basic fields to get your Profile going.

The first fields you will need to have filled in is your **First, Middle, and Last name** (*box: Your Name and Airport Security*). Make sure this information matches what you have on your driver's license or whatever ID you use at the airport.

Next you can input **Company Information**. You can put information on your work address as well as your home address; but you will notice none of those fields are a requirement.

Once you reached the **Contact Information** field, you will notice you will have some required fields. First, we need two phone numbers; we have a **work number** required and a **home phone number** required. If you don't have a home number or you won't want to use your home number, you can put your cell phone number in this field, but we will need two numbers.

Next is a contact **email address**. This is where your email address goes; however, if you'd like your information sent normally to a supervisor or assistant or if you want your itineraries automatically sent home, you can enter up to 3 email addresses.

You will notice at the bottom of each section, there is a **Save** button so make sure if you make any changes that you are saving that information.

The next field for you to complete is your **Emergency Contact Information**. This is not a required field, however, we do feel it's very important. As Kelly mentioned earlier, if you happened to be on the plane that landed in the Hudson, and we received information that you were out there, we would want to notify your emergency contact and this is where we would go to find that information.

Now we are on **Travel Preferences**. I do want to mention that Cliqbook will automatically go out and search for our government fares. However, if you are a member of AAA or AARP, and you want it to search for some additional discounts where there might be a hotel that doesn't have a state rate but maybe they have an AAA rate that's below the per diem, it will search for those fares as well.

Next, if you are not flying Southwest, you do get to choose your seat (*field: **Air Travel Preferences***). You can put in preferences; if you would like to always be by the aisle or the window or if you always want to be in the front or the bulkhead or the rear of the plane. Also, if you don't care, you can just mark that. Not many planes are supplying meals for us any more, but there is a place where you can put dietary restrictions (*field: **Special Meals: drop-down menu***) if you happen to be on a plane that provides a meal. There is no where to mark that you just want peanuts, so don't worry about that, those will be supplied!

This is kind of a neat field for people that fly out of the same airport most of the time; it's your **Preferred Departure Airport**. I fly out of Sacramento 99.9% of the time. I can populate that and say that I wanted that to be my preferred departure airport and it would pre-populate that in my search. It just saves you an extra step. You can type over that, if necessary.

Now we are on our **Hotel Preferences** and you can indicate if you want a king bed or queen or if you always want non-smoking. Also, we all say we are going

to workout every time we're traveling so we might want to make sure we have gym. If you are traveling alone and not comfortable going out in the evenings, but want to make sure there is a place for you to get dinner, you can mark that you'd like the hotel to have a restaurant or room service. Also for **Accessibility Needs**, if you need wheelchair access or blind accessibility, just mark the boxes here (box: **wheelchair access**; box: **blind accessible**).

Our **Car Rental Preferences**, we are going to still stay with the state rules, but if you know you always want the intermediate car or the compact you can mark that there or if you always want non-smoking and so forth. You can also mark automatic or manual.

This is the **Frequent-Traveler Program** section. So if you want to preload all of your Frequent-Traveler Program cards you can do so by marking the **Add a Program** button.

If you have a plane or rail frequent traveler number you would click this button (clicks on **plane/rail symbol**).

If it's a car program, you would mark this one (clicks on **car symbol**), and it's a hotel program you would mark the one that looks like a bed (clicks on **bed symbol**). Click on the arrow and it'll give you all the names of the hotel programs. You would just choose the one that you wanted to put the number in and then just type your number in. You can add as many as those as you need and then you're just going to click **Save** and it will add it to your Profile. I didn't have a number so it wasn't letting me do that. This will ensure that anytime you are flying or staying at hotels that you have programs, you'll receive your points for those.

If you stay at a hotel that was one of your favorites, and you want to make sure you remember where that was if it's in a large area like Los Angeles, and you stayed in an Embassy Suites but there might be several of those in the Los Angeles area, you can add that as a **Favorite Hotel** and that will bring that up when you're searching.

For **TSA Secure Flight** information, this is information that is required by the airlines, so you are required to input your gender and your date of birth.

There is also a section for **International Travel**. I know there isn't a lot of international travel going on right now, but, if you are a department that does travel internationally, you can put your passport information in this section.

If you have someone that books all of your travel, you are going to want to pay close attention to this section (field: **Assistants and Travel Arrangers**). If you want to set someone up to book travel for you, you click on **Add an Assistant**.

Now it's going to bring up a search field. This kind of works like Outlook in that anyone that's been loaded into the system for your department will be in this section. You can search by their last name or their email address. We are going to search by their name and it will just go out and search for this person and bring them up (*enters Kelly's last name "May" in **Search Criteria**; clicks on **Search***).

I want to assign Kelly to be able to book travel for me so I'm going to mark this button (*clicks button: **Can book travel for me***). But, I also want her to have access to my Profile in case I need her to change some of my preferences. So I'm actually going to assign her as my primary assistant for travel (*clicks button: **Is my primary assistant for travel***).

If you just want someone to be able to book travel for you, you can just mark the first button (*button: **Can book travel for me***). They will not be able to be assigned as your primary assistant unless they have a work phone number in their Profile, so make sure all of your travel arrangers go in and set up their Profile.

Now Kelly is listed as my primary travel assistant and she can book travel for me. If you need to change that at any time, you just go back into your Profile. You can have as many people in this section as you need. So if there are people who handle it but also you have back-ups, you can add anyone that will be booking travel for you.

The last section is the **Credit Card** information. Your hotel will be billed to your personal credit card but air and car are billed to your BTA or your Business Travel Account. The credit card number you put in here is just used here to hold your reservation and when you go to the hotel, they'll ask to see the card and at that time, if you want to change the card or pay by cash, that is when you do it.

To add a credit card, you click on **add a credit card** button and enter your information. As you can see all the numbers are blocked except for the last four digits, so this is secure information and no one will be able to see those other than you even someone who has access to your Profile.

And again, you only want to have to do this once so make sure you hit the **Save** button (*clicks on **Save***).

*(New Screen: **Processing, please wait...**)*

*(New Screen: **Cliqbook is not...**clicks on **Return to Home**)*

*(New Screen: **Concur Homepage**)*

That's it for arranging/setting up your Profile. And again, anytime you need to make changes to that, you'll just log into the Profile section and make any necessary changes.

Now we are going to walk through actually booking a trip. If you just want to book a car or hotel, you can click on tabs here (*tabs for **Car; Hotel***), but we are going to walk through an entire trip, so we're going to start with **Flight**. The system can be used to book **Round Trip, One Way** or **Multi-Segment**. If you were flying into LAX but you wanted to fly out of Burbank, you can do that by doing **Multi-Segment** and putting both cities in (*clicks on **Multi-Segment** and shows fields to enter each **Departure City***).

We are going to go **Round Trip** (*clicks on **Round Trip***). This is the **Departure City** so this is the field that would be pre-populated had I entered that into my Profile. You can type the airport code or the city that you are flying out of and it will bring up the airport code for you. I'm flying out of Sacramento and I'm going to fly into Los Angeles. As you can see I started to type Los Angeles but it brought up all of the airports in the Los Angeles area so you'd actually have your selection of airports. We are going to choose LAX.

For your **Departure** date, you click on the **Departure** field and it will bring up a calendar. Indicate which day you want to fly out. You can choose your time based on your departure time or the time your want to arrive. Most people use departure.

You can select your time: morning, afternoon or evening. I'm going to choose 7 a.m. but I do have a little bit of play with that schedule so I am going to ask it to search for any flights that are at 7 o'clock. or two hours before 7 or two hours after 7. It will give me a window of different flight availability.

My **Return** automatically pre-populates for the next day. But if I was staying more than one day, I would just click on the box and it would bring up another calendar for me. We're going to stick with the next day.

For the **Return** flight, we are going to still do the departure time. I'd like to fly back around 4 p.m. But again I have a little bit of flexibility. You can choose any where up to nine hours before or after the time you selected but I want to limit my search a little bit, so I'm going to just choose two hours.

I'm going to mark this box, **Pick-up/Drop-off car at airport**, because I'd like to pick up and drop off my car rental at the airport.

I'd also like to **Find a hotel** (*clicks on **Find a hotel***). It's going to give me a couple of options for finding a hotel. I'm going to choose to find a hotel within five

miles of the airport. However, you could enter an address if you had a meeting and have it search within five miles of the address you enter or if you have some company locations, you can get those preloaded into the system so you were able to choose a satellite office. Or if you just have a zip code or a reference point, like Statue of Liberty, you can put that in this section and search within five miles of that. We are going to stick with the airport. It's going to pre-populate our airport field to the airport we're arriving in which is LAX.

If I wanted to search for a specific hotel, say a Marriott or Hilton or any other hotel, I could search by checking the box and then typing what name I was looking for in here (*field: **With names containing***). But I want a good selection so we are going to leave that blank.

I only want a refundable airfare (*clicks on **Refundable only airfare***) and I'd like to Search for my flights based on price (*field: **Search flights by - clicks on Price***).

So that's it! (*clicks on **Search***) You've put in all the information you need for your entire trip.

What the system is going to do now is go out and look for the first thing I was reserving which was my airfare.

(Screens: Checking Your Profile...Please stand by...; Searching for flights...Please stand by...)

It's going to give me a couple of different options. It's going to display it in a grid for me and if you'll notice there is a standby message (*message in box*) so if you accidentally close this, you will be able to go back to the trip without starting over.

(New Screen: Flight Results)

It's pulled up my airfare. All of my choices are all listed in this grid for me. As you can see, we have 3 results for nonstops, 34 for one stops, 14 results for two stops. Since we are only flying to LAX, we definitely do not want any one stops or two stops. So we are going to click on the **Nonstop** results, and that's going to sort those for me.

(New Screen: Nonstop Flights)

Now you can scroll down and take a look at what your options are. Based on the information you put in, there is a \$218.40 United Flight, July 20 at 6 a.m. I'm going to arrive at 7:25 a.m. There are zero stops and it's a 1 hour and 25 minute flight. Here are the carbon emissions Kelly had talked about earlier; and the class that I'm flying on is economy.

I do want to point out here that we do have baggage fee policies (*click on **Baggage Fee Policy –window insert***). So if you want to double-check and see with United how much your bags are going to cost if you have to check them in: it's \$25 for the first bag, and \$35 for the second, and this gives you all the different airlines.

There's a little button over here that kind of looks like a car seat (*clicks on **seat symbol – window insert***), and this again is because you do get to choose where you want to sit on other flights besides Southwest. If you go into this, the available seats are green. I like to sit in this seat (*clicks on **seat symbol in plane seat map***) and here I am in my plane all nice and happy ready for my trip! Click on **Select Seat** and it saves that seat for me. **Close** out the seat map (*clicks on **Close***), and as you can see the seat has turned green which means I have selected this. If you do forget to choose your seat, don't worry, we won't make you fly on the wing, we'll assign you a seat automatically.

On my way back, (*clicks on **seat symbol – window insert***) I'm going to sit in this seat (*clicks on **seat symbol in plane seat map***); there I am again, happier, because I am on my way home! Select the seat (*clicks on **Select Seat***), and **Close** (*clicks on **Close***). Now you can see both going and coming, my seats are green which means I have seats reserved.

These are **yellow diamonds** next to the flight amount which means it's a state preferred vendor and we contract with them. Next to it shows it is a State of California fare and the ticket is refundable. This is a good flight for us to take, so we are going to go ahead and click on **Reserve**.

(New Screen: Trip Payment Information screen)

This field (*Trip Payment Information*) will not come up because this will be automatically billed to your Business Travel Account.

Now it's going to go out and make our reservations for our flight and it's going to work on putting my car rental options together.

(New Screen: Reserving your flights...Please stand by...)

Since we are the State of California, we are going to follow the contracts, which means that Enterprise is our primary vendor and we do have secondary contracts for National and Alamo.

(New Screen: Searching for cars...Please stand by...)

However, we need to use Enterprise first.

(New Screen: Car Availability)

So when you see your options come up, you're actually only going to see Enterprise or if your department has chosen to, you may see Enterprise, Alamo, and National. Enterprise isn't loaded into this demo site, but this is how the results will come up. It will give you a grid of what is available. It does mention at the top that the car reservations exceeding the \$39.49 full size car rate require submission of the Justification for the Rental Car Exceptions form. That form can be located on the first screen where Kelly was demonstrating the different form locations.

We are going to take this National car rental. Because it's \$35.02, it has a **yellow diamond** so we know it's a preferred vendor. I do want to mention, on the right side (*box: **Change Car Search***), if you need to make adjustments at this time, you don't have to go to all the way back out to that beginning screen. You can make changes to the date, drop-off, where you want to pick your car up, airport, and this is a nice button (*button: **Return car to another location***) because you can actually mark if you want to return your car to another location. Usually you have to remember to tell the people when you go to pick up your car, but this will make it automatic and you can enter where you are going to drop it off.

Now we are going to reserve this car. I want to point out the **E-receipt Enabled box**. If you sign up to receive E-receipts, then anyone who offers a receipt to be automatically emailed to you once you return the car or check out of the hotel will send you a receipt, and you'll get those automatically emailed to you (*clicks on **Reserve** button*).

(New Screen: Reserving your car....Please stand by)

Now it's reserving my car and it's going to go out and pick up all my hotel options and those will be based on my preferences that I put in according to how far I wanted it to be from the airport.

(New Screen: Retrieving your hotel search results...Please stand by)

(New Screen: Compare List)

Now we are going to scroll through our hotel choices. One of the hotels I had loaded in as a favorite was the Embassy Suites in Los Angeles. Here it shows you the little "F" (*the "F" is located after the name of the hotel*) which means it's a favorite. Currently it's at \$209.99 per night because it's for a suite, so we are going to scroll right over that because it's not within state per diem.

It's going to bring up hotels now that are within 5 miles of the airport. You can start scrolling down. Some of the hotels have pictures; some have visual tours. There is also this rating system over here (*to the right*): 1 through 4 stars.

I'm going to keep scrolling down. Here is a 3 star; it's only .87 miles from the airport. It's a Radisson; it looks pretty nice in the pictures; it has a sleep number bed, special rate for government employees, ID required. I like the looks of this one but I'm not quite sure because I haven't seen everything yet so I'm going to hit this button that says **Compare**. It's going to shoot that to the top of my page so I can keep scrolling down without losing track of where I'm at and I go back and look at my comparable hotels when I'm finished.

In this section here, (*box: !State of California Hotel..*) you'll note that we have some information on the hotel per diem for California. It mentions that the hotel per diem is \$84 and it does give you the exception counties of San Francisco, San Mateo, Santa Clara, and Alameda are all \$140; Los Angeles and San Diego are \$110. It tells you the form you will need, the Standard 255C, that will be required if you do exceed the per diem. Again, that form can be located in the Forms section on the first screen.

Here is the Crowne Plaza. This one looks pretty nice. It has a nice pool; I can get an E-Receipt there, again, three stars, and it's only 1.18 miles from the airport. That one looks pretty good too, so I'm going to click on **Compare**.

Finally, I will click on **Compare** this Marriott. So now it's shot a couple of my selections to the top so I'm going to scroll back up. The Radisson was the first that I wanted to compare so I want to click on **Info** (*a box pops up*) and this is going to give you all the information on the hotel: 3 stars (*rating*), a description of the hotel, general room information, directions, attractions, and anything the hotel has provided will be listed in this area (*clicks out of box*). You can click on **Info** for any hotel to find out more information.

This one is the closest and it's only \$99.00 so I'm going to go ahead and click on **Reserve** (*a box pops up*). The first things you see are the cancellation policies and rate details. You want to make sure that you read all of this information especially the cancellation policy. This one looks pretty generous because you only have to let them know by 4 p.m. on the day of arrival if you are not going to be staying at the hotel; but if you don't call by that time to let them know, you could get a charge of \$112.96. This way all your travelers are notified that they will need to cancel their hotel if they are not taking the trip; the traveler marks that they agree to the rules and restrictions (*clicks on the Agree box*). Then, click on **Continue** box.

We chose a hotel that was \$99.00 so that is above the State of California per diem of \$84.00. However, we know that this is Los Angeles so we get \$110.00.

We are going to click on the **Please Choose a Reason** drop down menu and we are going to go straight down to the Los Angeles County per diem which is \$110.00.

If you had another reason, as to why you were choosing above per diem, you could type that out in the field below. You could run reports to see if there are any policy violations and find out why people are choosing to stay in above hotel-rate hotels. A little bit of visual guilt, it also shows you hotels here that you could have chosen that were below the per diem rate. Now I'm going to click **Save** and keep on moving.

(New Screen: Trip Payment Information)

You put your credit card information in (*via Profile: Credit Card Information or in this section: Add a New Credit Card*) because you want to hold this hotel with it. You can put any number of hotels in this section, (**Choose a Credit Card**) and if you had more than one, you would click on the arrow (*clicks on the arrow; shows drop down menu*) if you wanted to choose from the credit cards that you wanted to use to hold this hotel room. Your credit card will not be billed until after you check out of the hotel but this is just to hold your reservation. Alright so I'm going to reserve the hotel by clicking **Reserve Hotel**.

(New Screen: Making hotel reservation...Please stand by...)

And now that's pretty much it because we have done all of the selections for our air, car, and hotel and now its going to make my hotel reservation and print up my itinerary so I can take a look at it.

I was telling you earlier about the **Stand by** page, saying if you accidentally close it, you can find a link to your trip on the **Travel Page** by clicking **Unfinished Reservations** so you don't have to start over again.

This field that pops up, (*window: Taxi Travel to Airport Made Easy*) is regarding taxi travel at the airport, so if you haven't chosen a car and you wanted to schedule a taxi from the airport you could do so here by viewing **View Ground Transportation Options**. However, we are not going to use ground transportation options because we have rented a car, so I am just going to click **Not Using Ground Transportation** to exit out of here.

(New Screen: Travel Details - Itinerary)

Here's my **Itinerary** that has the name of the person traveling, when it was created, this trip record locator number, and a total estimate for the trip. It's also letting me know that no frequent flyer programs were used on this trip, so if you

wanted to change that information and add a frequent flyer program you could do so by clicking **Change frequent flyer program**.

It has information on my flight including that it is confirmed, that there is no meal served, the CO2 emissions, the duration, and again it has the record locator number. It gives you your seat number, so if at this point you wanted to change your seat you could do so by clicking **Change Seat**.

For car rentals, it gives you a confirmation number and information on the car type. At this point if you wanted to cancel this car or change the date you could do so by clicking **Cancel this car** or **Change Date**.

Then it gives you information on your hotel including the address, the reservation time, the rate, that it's been confirmed, your cancellation policy, your confirmation number, and when you are supposed to check out.

It has information on your flight home; again, including the duration, the seat you can change again (**Change Seat**) or change this part of the flight (**Change This Leg**). Everything that you will need will be on this one page.

At this point, it is letting you know that your ticket isn't issued yet for airfare and the airfare quoted in the itinerary is not guaranteed until the tickets have been issued. Now I'm going to click on Next to get to the next screen.

(New Screen: Trip Booking Information)

You can actually name your trip, so I'm going to enter that this is my trip from Sacramento to Los Angeles in the **Trip Name** box. You can also have a trip description so I'm going to enter that this trip is for Cliqbook Training in the **Trip Description** box. Now I will be able to remember what this trip is so when I store it in my trip library, if I needed to find it again, this will help me remember.

At this point, if I wanted to send the confirmation to my supervisor, assistant or co-worker who was traveling with me, I could do so by putting their email address in the **Send a copy of the confirmation to** field. If I wanted to include directions to the hotel or both directions and maps, I would pick either option in the **With my email confirmation** field so that when it emails me my itinerary they will be included.

The **Index** and **PCA** fields are for payment where you would enter Index and PCA codes. Your department might call these something different and if they do then these fields would be labeled accordingly.

My airline tickets are on hold and will be until July 2nd at 5:30 p.m. So, I'm going to click on **Hold Trip** because I'm not actually traveling to Los Angeles next week and it's saving my trip.

(New Screen: Finished Page)

This is telling me I'm finished and that this trip will be cancelled automatically if I don't book this trip by July 2nd. Here's the itinerary again. From this page you can print or email the itinerary by clicking **Print Itinerary** or **Email Itinerary**. You can also click **Return to Travel Center** (*clicks on **Return to Travel Center***).

(New Screen: Travel Center)

Now you can see in the **Travel Center** (*center box tab: **Upcoming Trips***) that I have a trip that's on hold and again it's warning me that it will automatically be cancelled on July 2nd.

If you click on the trip in the blue field, a box will appear where you can click on **Finish/Complete Trip**, **Cancel Trip**, **Clone Trip**, and **Share Trip**. If I'm a travel arranger and I wanted to schedule the same trip for twenty different people, I can click on **Clone Trip** and make these reservations for more people.

If I wanted to share the trip because I wanted Kelly to travel with me, I could click on **Share Trip** (*pop-up window*) and click on Kelly's name, or anyone's name that is in the system, from the drop down box and click on **Search**, **OK**, and **Share the Trip**, and it will share the trip with her (*pop-up window: **Checking Itinerary...Please stand by...***). She will get a notification in her email that I've shared a trip with her and she will be able to go in and book the same trip. Now I'm going to click on **Trip Library**.

(New Screen: Trip Center)

Here is the **Trip Library** I talked about (*click on **Trip Library** under **Travel** tab at **top of page***). All of your trips are going to be automatically put into your **Trip Library** so you can go in and research the trip if you need to find some information on receipts. Again, this trip is on hold so it's allowing me to click on **Actions** to **Finish** or **Cancel Trip**, etc. Now I'm going to click on the **Home** under Travel tab.

(New Screen: Home)

Earlier, I showed you in your Profile that you can add your travel arranger by clicking on the **You are administering travel for** (*top right-hand side: drop down menu*). You can see that I have been set up to arrange travel for myself or for

Kelly May. If had made my reservations and I wanted to make them for Kelly, I would click on Kelly's name and I could go in and make these reservations.

Earlier, I sent Kelly an invitation to share the trip template with me. She can click on **View Trip**, **Book a copy**, or click on **Hide** if she didn't want to travel with me. Now I'm going to click on the **Templates** under **Travel** tab.

(New Screen: Templates)

There is also a place for templates, so if you travel to the same location once a month and you like to use the same flight and same hotel, and you always rent a car, you can set that up as a template and you can continue to use that trip. Now I'm going to click on the **Home** under the **Travel** tab.

(New Screen: Home)

(Kelly May begins speaking) We thank you very much for joining us today! We think that this is a great tool that you will absolutely love.

~ End of Training ~