



Statewide Travel and Meeting

Management Program

CALIFORNIA DEPARTMENT OF GENERAL SERVICES

Webinar Transcript: How to Book a Flight, Car, and Hotel Reservation

Welcome to the Concur Travel Training Series sponsored by the Department of General Services Statewide Travel Program.

Today's Concur training session will teach you "How to Book a Flight, Car, and Hotel Reservation."

Before we begin, please note that each entity's travel policies may slightly differ.

We recommend that you refer to your entity's travel coordinator for guidance and direction, if necessary.

Also, the Concur site being used in this series is for training purposes only. Your Concur site may look slightly different because it has been customized to meet your entity's travel policies.

Let's get started with this walk through!

We begin by going to the Concur login site which is located at www.caltravelstore.com.

Click on the "Concur login."

Log into Concur with your work email address and password.

If you are booking travel for another traveler that has assigned you as a travel arranger, click on "Profile" in the right-hand corner and a dialogue box appears; in this box you can either enter the name of the traveler or select the traveler's name from the drop-down menu and click "Start Session." Notice that on the right corner, it will indicate you are acting on behalf for the traveler you selected. The profile icon turns green and it shows

two travelers instead of one. Once you have completed the travel reservation for that user, click the “Profile” icon and select the blue “Done acting for others” button. Now the color of the profile icon changes back to black and there is an image of only one traveler. If you are booking travel for yourself, this step will not be necessary.

Let’s get started on our travel reservation.

From the Concur home page, look at the “Trip Search” section on the left side of the page. Click on the first tab along the top of the “Trip Search,” which shows a plane and train icon.

Select one of the following types of flight options: Round Trip, One Way or Multi City. For this demonstration, we will choose “Round Trip” since this is the most commonly used fare type.

In the “From” and “To” fields, enter the cities or airport codes for your travel. When you type in a city, airport name, or airport code, it will automatically search for a match.

Airports in that area will display in a drop-down menu.

Click on the appropriate airport.

Click in the “Depart” and “Return” date fields, and then select the appropriate dates from the calendar.

Select the appropriate departure and return times. The system will search before and after the times you select based on the +/- number of hours selected in the drop-down boxes. You can click the arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary. Hover the mouse pointer over the green bar to see all of the flights available for that time slot.

If you need a car, click the “Pick-up/Drop-off Car at Airport” checkbox.

If you need a hotel, click the “Find a Hotel” checkbox. Additional fields will appear. You can expand your search by changing the number of miles in the distance box. Choose to search near an airport, near an address, near a company location, or near a reference point or zip code, such as a city or neighborhood.

For the “Search by” field, select either Price or Schedule for how you first wish to review the airfare results.

To search only for refundable flights, click the “Refundable only air fares” checkbox. Otherwise, leave it unchecked to search for the lowest fare.

Then click the orange “Search” button and your flight search results will appear.

Please note that on the left hand side of the screen is a Trip Summary that is geared to assist you in following the necessary steps when booking your trip.

On the flight search results page, a grid or matrix summarizing your airfare search results will appear at the top of the page, with your search results appearing below.

The “preferred” text identifies the airline carrier as a State of California contracted vendor.

To filter your results, select a column, row, or cell from the matrix. For example, to view only the nonstop flights, click the “Nonstop” cell. To view only a specific airline, click the appropriate airline cell. For instance, if you click on “Southwest” and scroll below the matrix you will see only “Southwest” options. To choose a flight, click the blue “View Fares” button for the flight you wish to reserve and the different available fares will display.

The “Wanna Get Away” fares are nonrefundable but reusable. The “Anytime” fares are refundable unless you make a change then the ticket will become non-refundable but

reusable, and the “Business Select” fares are considered first class or premium types of fares. If you select the “Business Select” fares, you will see “Not Allowed” text on your site prohibiting you from purchasing them, unless it is allowed by your agency policy. For Southwest reservations, you can book different fare classes for each leg of the trip.

If you need to change your flight search, or filter your results, you can do so by using the toggle bars on the left side of the screen. For instance, if you need to adjust date or time or want to seek refundable only fares, you can click “Change Flight Search”, and make any adjustments to your search criteria. For instance, check “Refundable only air fares” and hit “Search.” The airfare will be refreshed to show this new search criteria. Now you see only refundable fares. Click on Delta and scroll below the matrix, you will see only Delta options.

Click on “Show all details” to see all available options.

If you would like to view the available seats on the aircraft, click “View Seats”. A map will display with the available seats. Then click “Close”. When you are ready to choose your fare, click the blue price button.

Once you have booked your flight you will be brought to a review screen. This will allow you to confirm that you’ve selected the right flight, confirm that you are booking for the right person, make your seat selection using the seat map (if it’s an option for your flight), review the charges, and review the airline rules and restrictions.

After reviewing the confirmation page, click “Reserve Flight and Continue.” There will be a similar screen to this after each step in the booking process.

While the system reserves the flight, you will see a standby page.

Now we will walk you through the rental car reservation.

If you checked the “Pick-up/Drop-off Car at Airport” checkbox, you will see your rental car search results.

Similar to the flight search, a matrix summarizing your search results will appear at the top of the page. If you follow the State of California car rental policy, compact and intermediate are the required car rental classes. Renting a vehicle larger than the intermediate size requires the car rental justification form; a link to the form is provided for you at the top of the page.

To filter your results, select a column, row, or cell from the matrix.

You can find the rental location, hours, and contact information by clicking on the “Location details” link.

Select your appropriate rental car by clicking the blue price button. Again, you will be brought to a review screen to review and confirm the car rental details. Then click “Reserve Car and Continue.”

While the system reserves the car rental, you will see a standby page.

Now we will walk you through the hotel search results.

If you selected “Find a Hotel” when you entered your search criteria, you will see your hotel search results.

A map will display your first 25 search results in relation to the location you entered as part of your search criteria.

You can sort the list of hotels by Preference, Price, Rating, Policy and Distance.

The default is set to display the hotels from the lowest price to the highest price. You can also search for specific hotels using the “Hotel Name Search” field.

To view the hotels, you may use the “Next” button to scroll through the pages of results, or select “All” to review all the results on one page.

If needed, you may use the options on the left side of your screen to filter your results by Hotel Chain and/or Hotel Amenities.

A picture as well as the name, address, star rating, and lowest price appears. Please note that the star rating system is not based on traveler reviews. We suggest using hotel review websites such as TripAdvisor or Yelp for traveler reviews.

Our DGS green certified hotels are identified with “Most Preferred Hotel” text. We encourage you to give preference to those hotels when it meets your business need and it falls within the approved lodging rates. These green hotels will be pulled from greater distances than your search criteria.

Click the picture of the hotel to see more images.

Click “Hotel details” to see information provided by the hotel, such as street address, cancellation policy, directions, attractions, and additional hotel information.

Click “View Rooms” to see the available rates. If your agency follows the State of California lodging rates, we recommend you refer to the CalHR website for short-term lodging reimbursement rates based on your bargaining unit. A link to CalHR’s website is provided on the top of the page. If you need to complete an excess lodging form, a link to the form is provided at the top of the page as well.

When you are ready to reserve a hotel room, choose the appropriate room rate and click the blue price button.

Once again, you will see a review screen, review the hotel reservation, provide any preferences or comments that should be passed on to the hotel, confirm the guest name and price, and agree to the hotel's rules and cancellation policy.

Then click "Reserve Hotel and Continue."

While the system reserves the hotel, you will see a standby page.

Now we will walk you through the completion of the reservation.

The next screen will open to your draft itinerary. Look at the left side of the screen, you will notice that you still have a couple steps to complete before you are finished.

Review the details of the reservation on this Travel Details page to add to your itinerary or make any desired changes, if necessary. Then click "Next" at the bottom of the page.

In the following screen, you can enter additional information about your trip on the Trip Booking Information page. Enter or modify your trip name. This is how the trip will appear on your itinerary and in the automated email from Concur. A trip description is optional.

Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas. If you book the trip, you will automatically receive the email. If you book as a travel arranger, you and the traveler will receive the email as well.

If your agency's Concur site is customized to capture accounting or billing codes, you may see additional fields to complete. Then, click the "Next" button to finalize the reservation.

Make sure you always scroll to the bottom of each page clicking "Next", "Next", "Next" until you have received the "Finished!" message.

Your itinerary appears again, with the trip information just entered, for final review.

Click “Purchase Ticket”, at the bottom of the page, to finalize your trip.

Once you click Purchase Ticket, your itinerary will appear one last time, now with a “Finished!” message in the upper left corner.

Now let’s return to the Concur Travel Center homepage where you can see your upcoming trip by clicking “My Trips.” Here you can view the itinerary and additional functions such as trip changes and cancellations, and other administrative features.

This concludes our training on how to book a flight, car, and hotel reservation.

We hope this session will assist you in booking your travel accommodations through Concur.