

("CalTravelStore" Website Screen)

Department of General Services Statewide Travel Program.

Today's Concur Travel 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 Travel 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 the walk through!

We begin by going to the Concur Travel 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 "apply." Notice that on the right corner, it will indicate you are administering travel for the traveler you selected. The profile icon turns red 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 "end admin session." Now the color of the profile icon changes back to white 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-Segment. For this demonstration, we will choose "round trip" since this is the most commonly used fare type.

In the Departure City and Arrival City fields, enter the cities 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 Departure and Return date fields, 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.

To search only for refundable flights, click the “Refundable only air fares” checkbox.

Otherwise, leave it unchecked to search for the lowest fare.

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

Then Click the “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 baggage fees are provided for you at the bottom of the grid so make sure you factor in those fees if you are preparing a cost estimate.

The yellow diamonds indicate this is a State of California contracted vendor. Southwest has 2 diamonds because they are the domestic preferred carrier.

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 “Show Fares” 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 fully refundable, and the “Business Select” fares are considered first class or premium types of fares. The “Business Select” fares will be greyed out 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 airfares” and hit “Search.” The airfare will be refreshed to show this new search criteria. Now you see only fully refundable fares. Click on Delta and scroll below the matrix to see only Delta options.

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

Once you are ready to make your selection, select your seat on the plane by clicking on the blue icon and choosing a seat from the available seat map. Click “Select Seat” and then “Close.” Choose your fare and click the green “Select” 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, select your seat on the plane (if it’s an option for your flight and you haven’t done so already), review the charges, and airline restrictions and rules.

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.

Next, 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 “More Info” link.

You can click on the picture of the car, if available, to see a larger picture as well as passenger and luggage capacity.

Select your appropriate rental car by clicking the green “Select” 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 10 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, 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 “With names containing” 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 the same page.

If needed, you may use the options on the left side of your screen to filter your results further, such as by Hotel Amenities, Hotel Chain, Neighborhood, etc.

A picture as well as the name, address, rating stars, and price range appears.

To compare hotels, click “compare” for the desired hotels. The selected hotels “float” to the top of the list for easy comparison.

Our DGS green certified hotels are identified with a green palm tree. 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 “more info” to see information provided by the hotel, such as street address, cancellation policy, directions, attractions, and additional information.

Click “Choose Room” to see the available rates. If your entity follows the State of California lodging rates, Concur will display the state lodging rates for you to know whether or not you are in compliance. If you need to complete an excess lodging form, a link to that form is provided at the top of the page.

When you are ready to reserve a hotel room, choose the appropriate room rate and click the “Select” button.

If a travel policy violation appears on your site, review the violation. Select the rate exception in the drop-down menu that applies. For instance, if your reservation is in Sacramento County and your rate is \$95, choose the Napa, Riverside and Sacramento rate of 95. If your rate is within Los Angeles, choose the LA, Orange, Ventura, Edwards Air Force Base per diem 120. You may also use the dialogue box below to add an explanation or more details, if necessary. Then click the “Save” 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 your 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 of 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. 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 an arranger, you and the traveler will receive the email as well.

If your entity’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 blue “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.