Book Travel using the Concur Online Tool

**Step One: Access**

Log onto Concur from the Penn TEM website: [www.upenn.edu/penntravel](http://www.upenn.edu/penntravel). Select Make Travel Reservations, and then click on the Concur icon. Enter your PennKeyName and Password. Concur will now launch.

- On the **Home** page, the **Trip Search** section appears on the left side of the page.
- Or, select the **Travel** tab at the top of the screen.

**Step Two: Identify the Traveler**

Arranging travel for yourself: Select **Booking for myself**

Arranging travel for a guest: Select **Book for a guest** (do not use this for Penn faculty, staff or student)

Arranging travel for **Penn faculty, staff or a student**: Look to the top right of the screen and select the **one head icon** or the word **Profile**. A pop up will open with the words “Administer for Another User”. Enter their name in the box. When it populates with their name, click **Start Session**

The one head icon will change to a red/orange icon of two heads. This is an indication that you are now booking travel for another individual, not yourself.
Step Three: Book travel – air, hotel, car rental

To make a flight reservation:

- Begin by selecting from one of the following flight options: Round Trip, One Way, Multi-Segment (if available)
- 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, Concur will automatically search for a match.
- Click in the Departure and Return date fields and select the appropriate dates from the calendar. Use the remaining fields in this section to define the desired time range.
- If you also need a rental car or hotel reservation, you can check the boxes at this point, or select to add after you have selected your flight.
- Click Search.

A pop up box will appear. If you know this field is OK, click Continue. If this is your first time booking through Concur online, you may have to enter a budget admin/approver in your profile. Click Cancel. Select Profile in the top right of the screen, and then Profile Settings. Look for the Budget Administrator/Approver field. If your approver for travel (not necessarily the same as your expense approver) is not in the box, click the three dots. Type in first or last name, select the approver from the list and click Save. If you are not sure who your trip approver should be or cannot find them using the search box, please inquire in your department. If you need further help, contact travel@exchange.upenn.edu

- A screen will appear with a drop down box. Select the appropriate description of the reservations being made. Note, any reservation made that does not include Air will require the input of a credit card number. The credit card will be used to hold the reservation.
- Click Next

Step Four: Select a flight

On the flight search results page, under the top results grid, there are two tabs. Select one of the options below to see flights by either Fare or Schedule.

- Shop by Fares – Shows round trip fares
- Shop by Schedule – Shows departure options first, and then return options second
A grid will appear at the top, indicating airlines that have available flights. You can select to see only a specific airline by clicking on their logo. You can also select number of stops by clicking on the appropriate one on the left side of the grid.

Scroll through the flight offerings. Often there are multiple pages. You can use the additional options on the left, to help in your search. You can also change your dates or cities by clicking Change Flight Search on the left side of the screen.

To see more detailed information regarding a certain flight, such as the layover details, click the Show Details button.

The result is:

Select your desired flight by clicking the Green Reserve button.
Step Five: Select a rental car
- If you requested a car, the rental car search results appear. Or, you can select Add Car.
- Complete the required fields, and select your car by hitting Reserve

Step Six: Select a hotel
- If you requested a hotel, the hotel search results appear. Or, you can select Add Hotel.
- Complete the required fields, and select your hotel by hitting Reserve

Step Seven: Complete the Review and Reserve Flight Page
Complete the following sections of this page.
- Review Flights – dates, times
- Review the Traveler Information – edit phones, emails, frequent flyer programs
- Pick seats on your flights (if available)
- Review Price Summary
- Select a Method of Payment
  - Best Practice: Airfare for University travel should be charged to “UPENN DIRECT BILL ACCOUNT”. The airfare is automatically charged to the University billing account, so there are no out-of-pocket expenses to the traveler
  - However, all other reservations, including hotel and car rental, require a credit card. These charges are reimbursed after travel through Concur Expense Reporting.
- Review Fare Rules and Restrictions
- Click Reserve Flight and Continue

Step Eight: Keep Track of Progress
Look to the left of the screen, throughout the booking process. The Trip Summary workflow appears. Review and change your itinerary, if necessary.

Items not bolded have not yet been completed

Step Nine: Review the Travel Details Page
- Review entire screen – details of each item booked.
- Review the cost information at the bottom of the itinerary.
- Click Next. An additional information page appears.
**Step Ten: Review the booking information**

Use this page to enter additional information about your trip.

- If desired, you can enter or change the trip name.
- If necessary, enter any comments for the travel agent.
  NOTE: an entry in this field could generate an agency fee.
- 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 will receive the email as well.
- **Required fields include:** Travel Type and Business Justification
- Fill in CNAC, ORG, BC, FUND, OBJECT, PROG and CREF if you know them
- Click Next.

**Step Eleven: Trip Confirmation**

Concur displays your itinerary a final time. This itinerary will include any messages about ticketing policies. NOTE: It is the responsibility of the traveler to know the entry and visa requirements when travel internationally. There is a link on the Penn TEM website (www.upenn.edu/penntravel), under Helpful Links to CIBT, the Penn preferred provider for visas. Use this link for information and to obtain a visa under Penn’s discounted rates.

**Step Twelve: Purchase the ticket**

Click Purchase Ticket to send your request to World Travel, our fulfillment agency for Concur online bookings. At this point your booking request will begin the approval process (for those travel reservations that include airfare). When you see Finished! In the Trip Summary on the left and at the top of the page, you have now finished your booking.
Your approver will receive an email requesting approval and the 26 digit budget codes. Once they complete and send it back, your flight booking will be completed. You will receive an email from COMPLEAT with the final confirmation. (If you do not receive this final email, your flight is not booked. Call World Travel directly to inquire - 888-641-9112.)

To cancel your flight or any part of your reservation

- Log into Concur, select the trip from your Travel tab.
- On the right side of the listing there will be an option to Cancel.

Or

- Call World Travel and speak to agent. They can cancel all or part of a trip for you.

To change your flight or any part of your reservation

- Call World Travel and speak to agent. They make changes for you.
- Flight changes could result in a rebooking fee that is charged by the airline
  - Domestic $200 - $300 per ticket
  - International $300 - $400 per ticket