Quick reference guide: Domestic Travel Bookings in Concur

Before booking in Concur

- All domestic travel requires pre-approval by your Line Manager against an application which contains a budget.
- This approved Domestic Funding Application will need to be attached to your Booking Request in Concur for Travel and Expense Approvers to check against (how to attach documents in below instructions).

Getting started in Concur

Requesting Flights

- Commence Travel Request via Concur dashboard (home page), using the Trip Search tool left of screen. This will capture all components required for travel.

  **Tip:** Only use Book for a guest if booking for a non-staff member. If booking for another staff member you will need to be set up as their Delegate and act as them.

- To start flight request click on Round Trip (unless booking a one-way flight).
- Input From departure airport / time (Airport search – note Avalon airport type in AVV)
- Input To arrival airport / time

  **Tip:** Depart/arrival times and window of hours either side of nominated time can be adjusted up and down using the last drop down box on each line.

Requesting Accommodation / Car Hire

- Directly below flight Return fields, check-box for either/both Pick-up/Drop-off car at airport / Find a Hotel
- Input relevant selection criteria for accommodation, which includes Hotel name/address if known
- Click Search

Selecting Flights

Concur goes into search mode to bring up available flights

- Select Departure carrier / flight time
- Select Return carrier / flight time

  **Tip:** Note the conditions around cheapest flights, normally cheap flights are non-refundable. To check click on the fare type (above fare cost) to see conditions and choose wisely if there’s a chance you might need to change flights.

- Both flight selections will appear top of screen, verify correct and then click Select
- If your flight selections are not best fare available, a Travel Policy Violation pop-up screen will appear requiring you to select a reason. Choose most applicable justification.
- Select Save.
Review and Reserve Flight screen

- Review flight information
  
  **Tip:** If you have a Frequent Flyer Programme (not already uploaded in your Profile Settings), this can be added by clicking Add a Programme

- **Seat Assignment**, click Select Seats and then locate your preferred seat (any seat that is blue)
- Click Select Seat
- Click Close
- Repeat above steps for Return flight
- When all information is checked/input, click Reserve Flight and Continue

Searching for Car Hire (if selected)

Concur goes into search mode to bring up available car hire companies

- Select one of the Preferred car hire companies (Avis / Hertz / Thrifty) and appropriate car type
- Selected option will display below
- Click the blue tile displaying AUD amount

Review and Reserve Car screen

- Add special requirements in Provide Rental Car Preferences
- Click Reserve Car and Continue

Select a Hotel (if selected)

Concur goes into search mode to bring up available hotels

- Based on your initial search criteria, hotels will display
- If you want to change your search results, in left hand side menu, select Change Search drop down and enter new search criteria
- When preferred hotel is found click on View Rooms, which will open up room type options

Make sure you check the conditions of the room option you are selecting, often the cheapest option will be non-refundable and non-changeable. Note that rooms marked as ADVANCE PURCHASE / ADVANCE SAVER should NOT be selected as payment is instant before your approval has been given.

Review and Reserve Hotel screen

- Add in any additional requirements via the Provide Hotel Room Preferences
- Review Rate Details and Cancellation Policy again before ticking Agree
- Click Reserve Hotel and Continue
**Tip:** All flight and accommodation costs are charged to the University’s AirPlus card (virtual Mastercard), this method of payment cannot be changed. All car hire is charged to a central NAB purchase card via a Chargeback set up and expenses will be journaled back accordingly.

**Retrieving Itinerary**

**Travel Details**
- This screen provides a summary of all travel requests. Review all details, edit where possible/required
- If correct click **Next**

*AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED. TICKET IS NOT YET ISSUED UNTIL YOUR REQUEST IS APPROVED BY YOUR LINE APPROVER.*

**Trip Booking Information page**
- In **Trip Name** (pre-populated with booking info) and replace text with your trip name, which would be details of meeting / conference / business purpose + travel type. (Eg. DASSH Conference flights + accomm.)
- Add additional email recipient only if required (you and any delegates set to receive emails will be emailed by default)
- Project Code field not required (charges will go to your Expenses and you can change codes accordingly if your default setting is incorrect)
- Click **Next**
- **Trip Confirmation**, select **Confirm Booking**

**Request**
- On your Request page you will note a unique trip ID number allocated to this request
- Complete remaining fields on **Request Header**
- Attach your approved Domestic Funding Application by selecting blue **Attachments** tile, top right (note document must be a PDF)
- Select **Attach Documents**, and then **Browse** and **Upload**
- **Save** (blue tab top right)
- **Select Submit Request** (orange tab top right)
- Your Request once submitted will route through the Approval Workflow to your Approver.
- Once your Request has been approved, you will receive an updated status change from Concur, advising your travel is approved AND you will receive your final Itinerary from Campus Travel and this acts as your E-Ticket. Only when you receive this are you booked and good to travel

If you are needing to book flights and accommodation for more than one person this will need to done under each person’s name (the system will not allow group bookings).
Booking multiple travellers

Traveller A

*Tip:* You will need to be set up as a delegate (to book travel requests) if you are wanting to book travel for multiple travellers

- Proceed with booking request for Traveller A as per previous instructions and **Submit Request** (if you can see from seat availability with this booking the number of seats required for other travellers won’t be available then don’t Submit Request but **Save** and then contact Campus Travel to book offline)
- Select **Travel** tab from top ribbon
- Select **Upcoming Trips** tab from mid screen
- Under **Trip Name/Description** click on booking request you want to copy/share with Traveller B
- Travel Itinerary will open, scroll to bottom of screen and select **Share Trip** tab
- Locate Traveller B via **Share this trip with:** by clicking on **Search**, locate and click **OK**
- Add any **Invitation comments** you may want to advise Traveller B
- Click **Share Trip**, click **Close Window**
- Click Share Trip tab again for each additional traveler

Traveller B

- An email notification will generate to any additional travellers you have invited
- Traveller B logs into **Concur**
- Select **Travel** tab from top ribbon
- Trip Invitation will be visible under **Travel Alerts**
- To view the proposed Travel Itinerary click on **View Trip**
- To proceed with submitting your booking click on **Book a Copy**
- **Clone Trip** page opens. To view the seating allocations for Traveller A click on **View Trip Information**

*Tip:* Note these seat numbers so you have on hand when selecting your seats

- If proceeding with flight details showing click **Next**
- Flights will already pre-select, click **Select**
- **Review and Reserve Flight** page, go to **Seat Assignment** and click on **Select Seats**
- Proceed with all further steps to complete the booking
- You will then be directed to the Requests page, complete the missing fields and then click **Submit Request**