

## Concur Travel Making a Travel Booking

F1 Hello and welcome to FCM travel training for York University's new travel program

F2 You have already been using Concur Expense. You will now have access to the Travel tab in Concur found up on the top left-hand corner, and you log-in the same way you usually would for Expense.

F3 The first step would be to update your Travel Profile

F4 The way that this can be done is by heading up to the right-hand corner and clicking on the Profile Settings button

F5 Then clicking on Profile Settings

F6 The next place is Personal Information and from here you will be able to update your travel profile. First is to make sure that your name, First Name and Last Name and middle name if applicable are all filled in and spelt correctly as per your travel documents. That is the first thing to make sure of before you are making your first booking. Then you can go through the rest of the profile and fill-in all the relevant information. Phone numbers are mandatory, at least one phone number, but do fill in as much information as you are able to. This means that we will be able to get a hold of you in the instance of flight changes and things like that. There is, also areas for emergency contact details so you can enter that information into your travel profile. And then your travel preferences, so things like meal requests, seating requests, can all be selected from the dropdown menus. So do fill out as much of the profile that you can. The nice thing about this travel profile is that it is saved for any bookings you make with your travel team as well. Down below you also have the option of entering any frequent flyer information. Do so by clicking on Add Program and it will open-up a window where you be able to select if it is a flight, or a car or hotel program. Select the relevant operator and enter in the number. No need to enter in the airline code, just the number and click save. Then below that you will have the option to add your Passport or Visa information. Using the dropdown menu select the relevant item you would like to add, then the relevant number and expiry date. The nice thing about this is that it will remind you if you have documents that are about to expire so the tool will help you out with that. So, enter in any information and then click save to let that information is added to your profile. The other thing you want to ensure is that you add your payment card details. If you already have a card loaded into Expense that may appear here. You just want to make sure that it is ticked for air, car, hotel and rail travel. If it isn't and you don't see those icons just go into the card by using the edit button, the little pencil, and tick the relevant boxes within the card details. Then click save. If you don't have a credit card loaded here, you can add a new card just by clicking on Add a Credit Card. Again, you want to add-in all the relevant information and you want to tick all the relevant boxes, then click save.

F7 All you need to do is save once on the Profile screen and that will be committed to your profile.

F8 And now on to Making a Travel Booking

F9 All you need to do is click on the Travel tab and it will bring you to the area where you are able to search. You will see that flight, car, hotel tabs at the top. There is also some messaging on the right-hand

side. "Welcome to York University". And this is where you will find the details of your travel consultant team, including office hours, phone numbers and email and technical support. So, this is where you go if you are having issues with the on-line booking tool you can call this number or email for assistance. If you want to do a search, just select the flight tab or the relevant item you want to book and segment trips however more complicated trips should be booked off-line through your servicing team. The system is intuitive, so go through filling in your flight information. You can use the "arrive before" dropdown if you need to be somewhere before a certain time. Then just fill in the relevant return date, the time you would like to come back, and if you would like to add a hotel and a car to your booking you can tick the relevant boxes. You can search for hotels numerous different ways. The default is by the city that you are travelling to, but you can amend that. There is also an option for adding Air Canada promotional codes, and you can select your class of service. All you have to do now is click the search.

F10 Then you get your search results. You can see on the left-hand side the book flow. You can also see along the side some filter options. You can use these filters to slide the results on the right-hand side. So, if you want to narrow down your search results you can use the filters to do so. Check at the top of the screen as well. We have what we call the Fare Matrix. The Fare Matrix is where you find the relevant airlines that fly the route you are searching for. This is an intuitive matrix so you can click and move around on the matrix to see specific non-stop flights or specific airline. You also have your outbound and return flights, and you can see all of the options and you just need to select the flight that you are interested in. You can see all the relevant flight information as well, such as departure and arrival times, if there is any sort of connection on route, and the type of aircraft you might be travelling in. Within Canadian travel you will notice that Westjet and Air Canada have different classes of service. You can click on the little name of class of service and it will open up and let you know what's included in that specific fare. All you need to do is select the flight you are interested in and it will move to the top of the screen. One thing to bear in mind is that you cannot combine Westjet and Air Canada in the same booking. You need to keep it to just Westjet or Air Canada, or you will have to book them separately or book them with the servicing team and then can combine that fare for you.

F11 Once you have added your outbound and return flights you can click on select and it will price out the options that you have selected.

F12 It will give you a total fare for that flight, and if you are happy with that you can just click on Reserve.

F13 From there it gives you the chance to review the flight information, to add any frequent flyer information if you haven't done so already. You can do that at this point by selecting from the drop-down or clicking on Add a Program. Below that is a reminder of the total price of the ticket and you will be asked to select your method of payment, which will be the card that is loaded into your profile. If no method of payment appears you can select Add Credit Card and add a credit card if you haven't done so already.

F14 The next step, because we asked to reserve a car it is going to display our car results for us. Up at the top, similar to the flight search, is the matrix and below are the results. You can see the type of car, the cost per day. You can select which car you are interested in. It gives you a chance to review everything. If I have a rental program in my profile it will automatically be applied for me. And then again, I can select the method of payment and reserve and continue.

F15 The last step of the booking process is the hotels. As I mentioned, you will have a map up at the top that will show you the reference point that you searched for. In this instance it is downtown Vancouver. If you click on the little red dot, that is the reference point. Every other green dot is a hotel that is in the area. The map is fully clickable and you can zoom in and out. Below that is all the itemized hotels. So you can see the information on the hotels.

F16 If you click on View on Map it will bring you to that exact location on the map, and again, you can zoom in and zoom out.

F17 From here you have the option to expand the specific rate at the hotel you are looking for. You can see that the CAUBO rates are loaded so the University rates display. So, you can use those rates. One thing to bear in mind is that we do have hotels that do require full prepayment and are non-flexible are greyed in the system. If you need to book these types of hotel please contact the servicing team to do so. Once you are happy with the rate selected you can click on the reserve button.

F18 On the next screen it will give you a chance to review the information, add a program if you have one, and then select the method of payment again. So that would be the card on your profile. Below that you will be asked to review the Terms & Conditions of the hotel to ensure that you are happy with them. Then click the little box to agree and click reserve.

F19 You will then have a chance to review your travel itinerary. This would include your flights, your car, your hotel and return flight. It also gives you the total cost of the booking. Once you are happy with that you click on Next.

F20 You will be asked for your Trip Booking Information. This is things like, the trip name if you want to rename and whether or not you want to include maps to your hotels or to copy anyone on the itinerary.

F21 The final screen is your trip confirmation screens. This is your last chance to review your entire booking before completing it. Double check that you are happy with everything on this screen and then click on Purchase Ticket.

F22 It will then take you to the final screen. This screen is what you need to see every time you complete a booking. You should see Finished up at the top of the screen and Finished with a large blue checkmark. This is what will also be emailed to you so what you see on this screen will be emailed to your email address. It includes all of the details including confirmation numbers which is what you will use for on-line check-in. So each component will have a confirmation number. If you want to go to the main screen click on Return to Travel Centre.

F23 You will now see that there is an upcoming trip in my Trip Library which I can then click on.

F24 It recalls the details of the itinerary. There are a few things I can do here. I can add it to my calendars, I can create templates, I can copy or share the trips as well. There is many features you can do within this area. You will also see in the top right corner that I have one upcoming trip. These trips will automatically be added to your expense. One thing to bere in mind is that the FCM fee will be on top of what you see in Concur.

F25 Thank you very much for your time and for attending the training.

