! **IMPORTANT REMINDERS:**

- Concur is for university business use ONLY – no personal travel is permitted to be booked through Concur.
- An approved Spend Authorization (SA#) is required at purchase.
- Access to Concur is limited to employees only (no contingent or part time employee access).
- Your Concur access is based on the agency that supports your travel demographic in Workday:
  - If you are UNIV, OSUP, Health System = Concur with Corporate Travel Planners (**Individual business travel**)
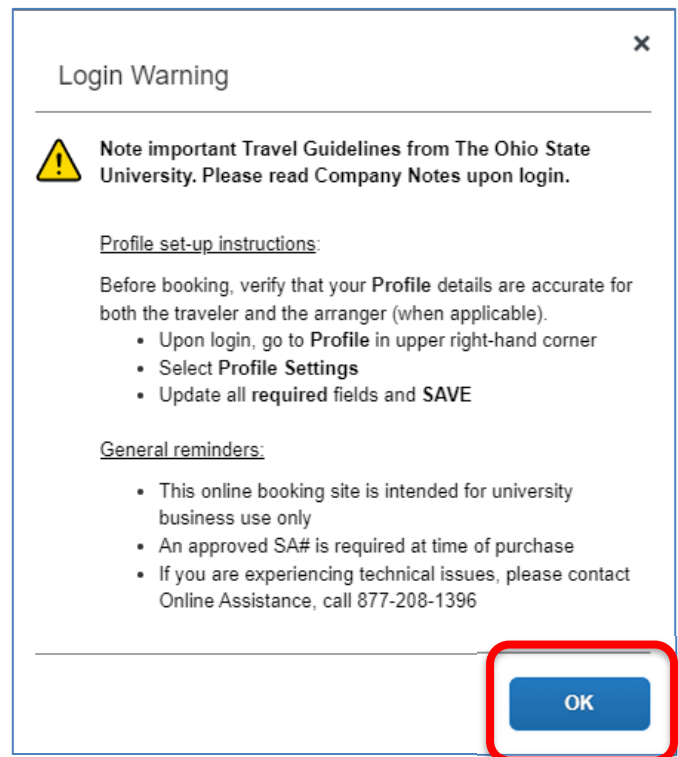 - If you are ATHLETICS = Concur with Anthony Travel (Athletics business travel)

If you have any questions, or need further assistance please contact the Travel Office at 614-292-9290 or travel@osu.edu.

Booking Airfare for Another Employee

> **IMPORTANT NOTE:** Before booking airfare in Concur, there must be an APPROVED Spend Authorization issued from Workday to the traveler named for the dates booked. Do no recycle an old Spend Authorization or enter a fraudulent number to bypass [Travel Policy](#).

!!Before login in to Concur!! Verify with the Employee (traveler) that you are set up as their Travel Assistant (Arranger) in Concur. For more information, see *[Assigning Travel Assistant](#)* job aid located at the [Travel website](#) under Training and Job Aids – Concur Booking Tool.

1. Navigate to Concur located at the [Travel website](#).
2. Click "**Book Travel Online**" icon
3. Login with OSU credentials (e.g., *name.#* and password) and respond to duo pass.
   o Based on your login credentials, you will automatically be directed to the appropriate OSU instance of Concur based on your primary assignment (University <u>or</u> Athletics).
4. Click **OK** at the Login Warning.

Login Warning ✕

⚠ Note important Travel Guidelines from The Ohio State University. Please read Company Notes upon login.

<u>Profile set-up instructions:</u>

Before booking, verify that your **Profile** details are accurate for both the traveler and the arranger (when applicable).
- Upon login, go to **Profile** in upper right-hand corner
- Select **Profile Settings**
- Update all **required** fields and **SAVE**

<u>General reminders:</u>

- This online booking site is intended for university business use only
- An approved SA# is required at time of purchase
- If you are experiencing technical issues, please contact Online Assistance, call 877-208-1396

OK

5. Verify that all information in **<u>your</u>** Concur Profile is accurate and all required fields are complete. Click Profile in the upper right header of the Concur home page. Your name will be displayed based on your login. If all the information in your profile is complete and accurate, move to the next step.
   - For more information, see *[Completing Concur Profile](#)* job aid located at the [Travel website](#) under Training and Job Aids – Concur Booking Tool.

6. You will now need to switch to the profile of the Employee (traveler) whose airfare you will be booking.
    - Go to "**Profile**" in the upper right-hand corner of the page.
    - Under "**Acting as other user**", enter the name of the Employee (traveler) in the search field for whom you will be arranging flights. You can search by firstname and lastname or employee ID.
    - When you identify the Employee (traveler), click on **Start Session**.
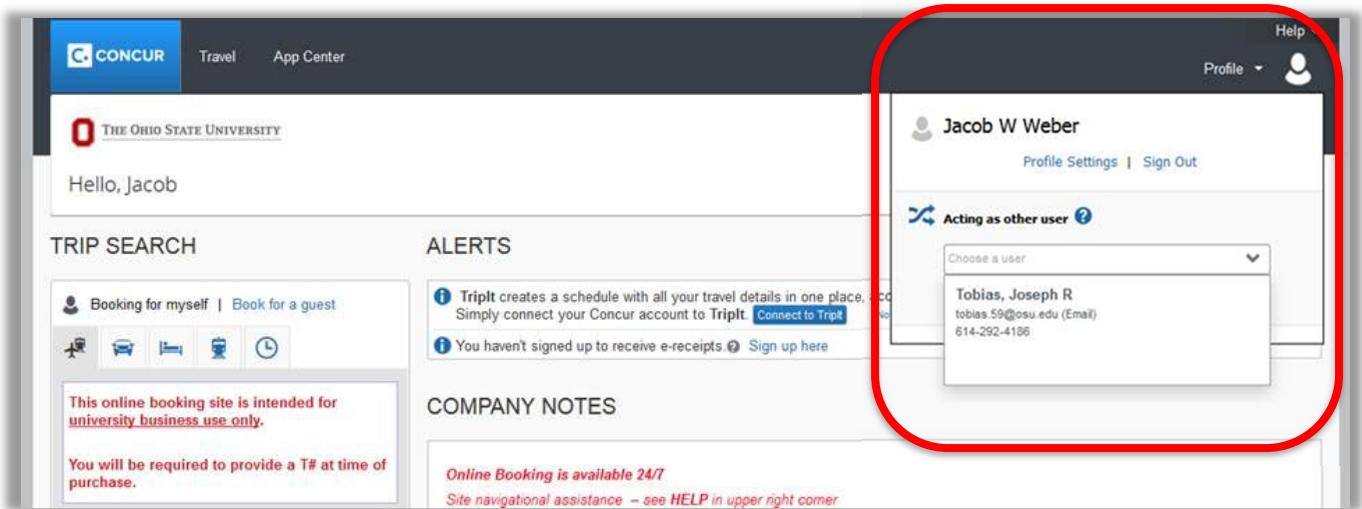
Note: If the traveler's name does not appear in search results, they have not yet assigned you as their Travel Assistant. For instructions on assigning a travel assistant, see *Assigning Travel Assistant* job aid located at the Travel website under Training and Job Aids – Concur Booking Tool.

7. Upon switching to Employee's (traveler) profile, the top right will change to green, displaying "**Acting as…**" and the name of the Employee (not your name).

8. Verify that all information in the **Employee's (traveler)** Concur Profile is accurate and all required fields are complete. Click Profile in the upper right header of the Concur home page. Your name will be displayed based on your login. If all the information in their profile is complete and accurate, move to the next step.
    - For more information, see *Completing Concur Profile* job aid located at the Travel website under Training and Job Aids – Concur Booking Tool.

9. Under the **Trip Search** section, click the tab for Mixed Flight/Train Search.
   - Begin search by the default Round Trip (or change to One Way, or Multi City)
   - Enter Departure City and Arrival City.

*NOTE: For Athletic Business Travel, the use of Concur is restricted for international travel. Contact a full-service agent for assistance with international bookings.
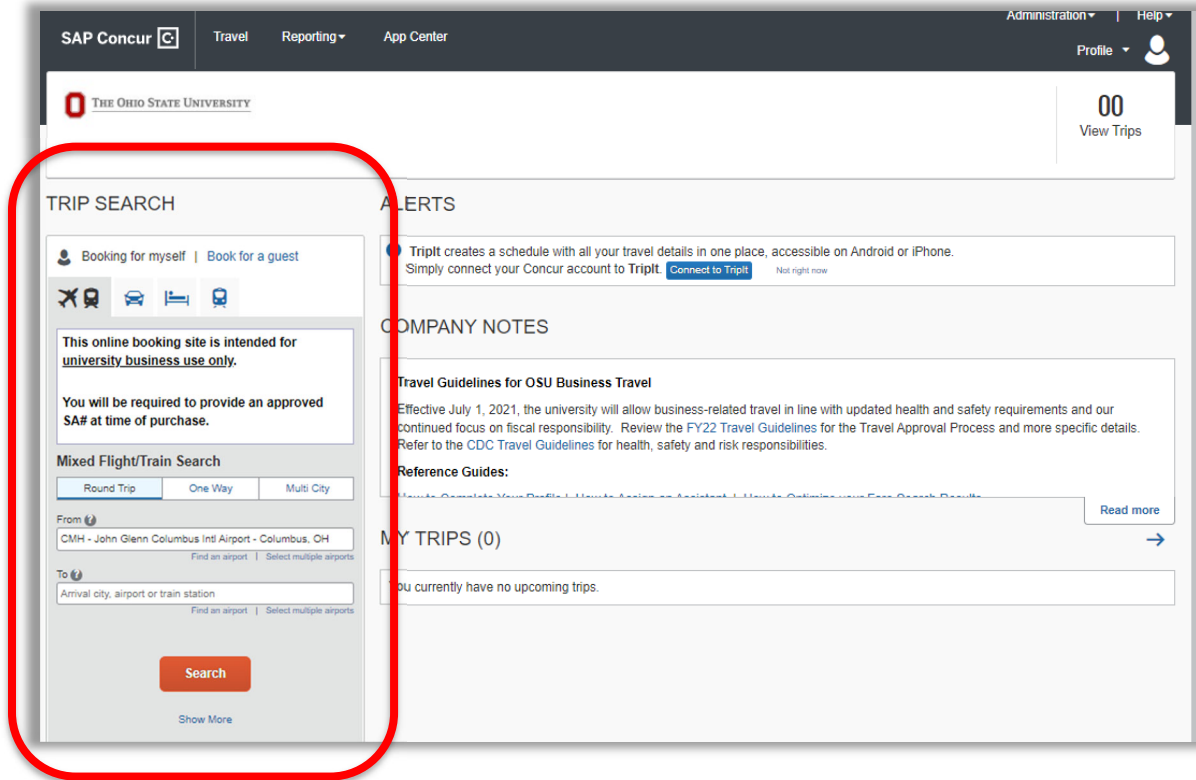
10. Enter Departure and Return Time.
    - This feature allows you to specify what time the Employee (traveler) would like to depart or arrive for that airfare leg. You can search by a broad time frame (morning, afternoon) or by specific times. The dropdown box to the far right allows you to search on either side of the time you selected, based on the number of hours you choose.
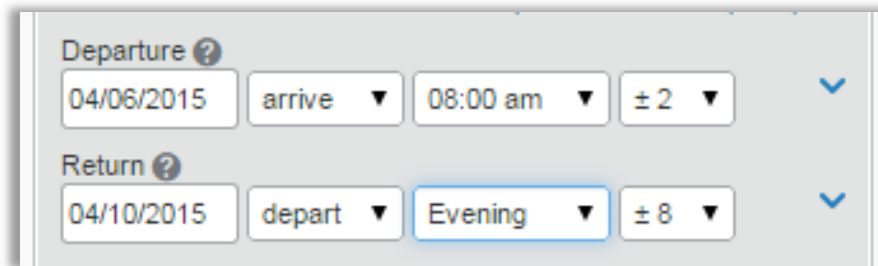
11. Once your search parameters are selected, click "**Search**" button.

12. After the search is complete, you will see a results matrix at the top of the page.

- The matrix offers the ability to filter and refine the results by number of stops or airline (e.g., if we only wanted to view only the nonstop options, we would click "Nonstop").

- The left panel offers additional options to filter and further limit your results (e.g., sliding the Depart and Return sliders allows you to find more specific options).

13. After you have found the selection that meets the Employee's (traveler) business need (within Travel Policy), click on the blue **Select** button displaying the price for that flight.

NOTE: If you encounter fares with yellow warning symbols, these selections may have rules that prevent purchase in Concur (e.g., Frontier) and must be booked through a full-service agent; or are basic economy fares that come with limitations that may not be ideal for business travel.

14. Next, you will be routed to the **Review and Reserve Flight** page to review your selection, verify traveler information, select seats (when permitted by the airline) and select the desired payment method.

- Verify that your flight selection meets your needs.

- Verify that your information as primary traveler appears correctly. If this information is not correct, you can change it in your Concur Profile. **This should not be your name.**

- Review the Price Summary to confirm total cost of your airfare. This is subject to change at the discretion of the airline until the purchase is complete.

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	$534.58	$85.29	$619.87

Total Estimated Cost : $619.87 USD

Total Due Now: $619.87 USD

- Select **Method of Payment** from the drop-down. In most cases, you should be selecting the AIRFARE PREPAYMENT card to bill the transaction to OSU directly. Alternatively, you can use the Employee's (traveler)personal credit card by clicking Add Credit Card. PCards should not be used to purchase airfare.

SELECT A METHOD OF PAYMENT

To comply with the Ohio State University Travel Policy, an approved Spend Authorization/SA# is required to finalize purchase.

AIRFARE:

- Select the **AIRFARE PREPAYMENT** card to reduce personal out of pocket expenses (An APPROVED Spend Authorization/SA# is required).
- For business travel only.
- For all OSU business funding sources (UNIV, Health System AND OSP/Sponsored).
- Do not use a Department or Individual PCard for airfare purchases

HOTEL:

- There are no OSU credit cards loaded for hotel reservations.
- To book a hotel reservation, OSU business travelers must add a personal credit card or PCard (see **Add credit card** link below).

How would you like to pay?

Please choose a credit card.   Add credit card

Please choose a credit card.
AIRFARE PREPAYMENT* (...1329)
VI4715 XXXX XXXX 8734 (...8734)

- Once all information is entered and verified, click "**Reserve Flight and Continue**" to reserve your tickets.


Back   Reserve Flight and Continue
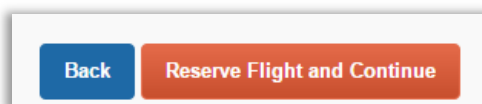
NOTE: The flight is **only** reserved at this point. It will NOT be ticketed until you fully complete the booking process. Pricing is subject to change at discretion of the airline until the purchase is complete.

15. Next, on the **Travel Details** page, you are given an opportunity for final review.
   - If you would like to send or print a copy of your reserved trip, select "**Print Itinerary**" or "**Email Itinerary**".
   - Note the day and time the reservation will expire if the booking process is not completed.
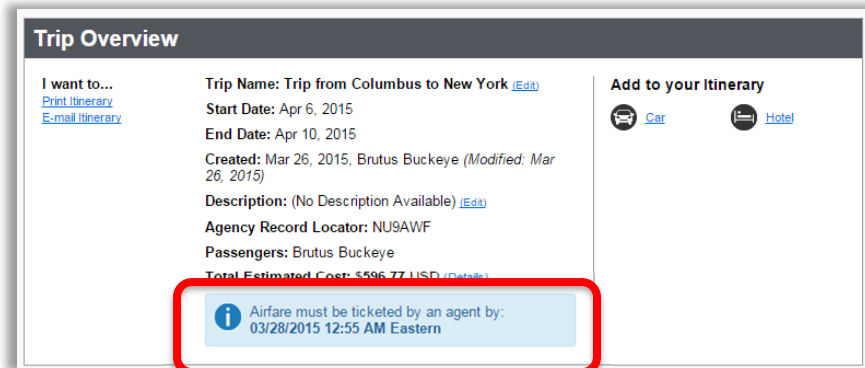
   - Once you have completed your final review, you are ready to complete the booking. Scroll to the bottom of the page and click on the blue "**Next >>**" button.
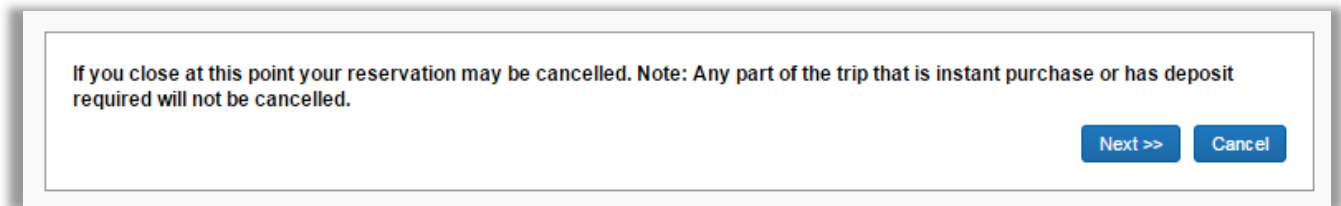
16. Next, on the **Trip Booking Information** page, you will enter the final requirements to complete the booking and purchase the airfare.
   - Provide approved SA# (Spend Authorization issued from Workday) using the format SA-########## (10-digits)
   - Indicate if any unused tickets in your profile should be used by selecting either "No unused tickets" or "Yes unused ticket applies"
   - All other fields are optional (exceptions may apply for Athletics)
   - It is helpful to note how long the system will let you hold your reservations without booking the ticket. If you have not completed the booking process by that time, your trip will be cancelled.

Trip Booking Information

- The Itinerary Summary and Confirmed/Ticketed emails will follow completion of this booking by clicking Next>> (below) and following any additional prompts.

- Reservation may be held by clicking 'Hold Trip' button below. Note the time available for HOLD below.

- To comply with university policy, an approved SA# will be required to finalize purchase (see SA# field below).

The trip name and description are for your record keeping convenience.

Trip Name
This will appear in your upcoming trip list.

Trip from Columbus to Chicago

Trip Description (optional)
Used to identify the trip purpose

Send a copy of the confirmation to: 🛈

Send my email confirmation as
⦿HTML ○Plain-text

Please provide a valid/approved SA# for travel (example... SA-#########) [Required]

Do you have an unused ticket in your profile you would like to use? [Required]

You may HOLD this reservation until: 02/09/2023 12:55 am Eastern

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

[Display Trip] [Hold Trip] [<< Previous] [Next >>] [Cancel Trip]

- Once you have completed all required fields and are ready to finalize the booking. Scroll to the bottom of the page and click on the blue "**Next >>**" button to proceed.

17. After selecting "**Next >>**", you will have one last time to review all your selections and entries. Verify that all the details are accurate, and when you have confirmed your itinerary, scroll to the bottom of the page and select "**Purchase Tickets**".

Almost done... Please confirm this itinerary.

[Display Trip] [<< Previous] [Purchase Ticket>>] [Cancel Trip]

- You will then be directed to a confirmation page, where you can make note of the agency assigned Trip Record Locator.

Finished!

You have successfully booked your trip!

Trip Record Locator : 4LOCZW

- Within minutes, you and the Employee (traveler) should receive an email with the subject "Summary Itinerary or Travel Reservation", confirming the booking was received by the travel agency. At that point, the trip will go through a quality control process at the contracted agency, and then be ticketed.

18. A second email from the contracted agency with the subject "Confirmed/Ticketed or Electronic Invoice" should arrive within 1-2 hours stating that the Employee's (traveler) airfare has been **ticketed**. This is the final itinerary and is considered the airfare receipt that will be uploaded to the Expense Report in Workday.

If you and the Employee (traveler) do not receive this final email within 2 hours, contact the agency to check the status.