

MAKING RESERVATIONS FOR OTHER EMPLOYEES

LOG INTO YOUR CONCUR ACCOUNT

(See user guide for log in and booking instructions)

- Select traveler's name from the pull down menu on the upper right of the screen.

- The traveler must select you as a travel arranger in their profile for you to see their name in your pull down list. Your Institutional Travel Manager may also assign the traveler to your profile.
- Be sure to change the pull down menu to the traveler name. The default in this space is "me".
- Their travel profile preferences, and frequent traveler accounts will automatically pre-populate as you go through the booking process.
- Follow Concur process for booking flights, hotels, and rental cars.
- The travel reservation can be found under the "Arrangers" section within your profile, under "Upcoming Travelers" tab in the center of your page.

BOOKING A GUEST TRAVELER

All Travel Arranger/Assistant's must have coordinator status in your profile to book for a non-employee guest traveler. Contact your [Institutional Travel Manager](#) for this access. Once you have this status, follow the steps below.

Log in to your profile:

- Select '**Guest Traveler**' from the drop down menu in the upper right side of the screen.

- Enter data in the flight search area.
- Select the **Division name** that will be purchasing the ticket.
- Select desired flights.
- Enter guest name and details after booking flights.
- Follow prompts to enter payment (credit card) info, etc.

TRIP PAYMENT

Traveler profiles **must** contain either a University Purchasing Card or a University Corporate Travel Card, both issued by US Bank. For University Guest Travelers, enter a Purchasing Card number when prompted for payment.

When entering credit cards in the traveler profile, you **must** define how the card can be used (air tickets, car rental, etc.). Typically, the first card entered will be used when more than one card has been listed.

CHANGE OR CANCEL A BOOKING

Changes to flights booked on Concur can only be completed prior to ticket issue. For post-ticket flight changes or changes to reservations that you have booked over the phone, please contact Fox World Travel at 866-230-8787.

- Select the traveler's name from the pull down menu on the upper right of the screen.
- If you have an un-ticketed trip and wish to make a change, select a Trip Name from the '**Upcoming Trips**' tab. This will activate the '**Trip Actions**' menu.
- Choose '**Change Trip**' or '**Cancel Trip**' from the Trip Actions menu. The Concur travel wizard will open the trip so you can make changes.
- Trip cancellations can be completed online.

CONFIRMING YOUR BOOKING

- The '**Travel Details**' page provides an opportunity to review your selections prior to purchase.
- To change existing reservations, Call **Fox World Travel at 866-230-8787**.

- Select '**Change Seat**' to change any pre-assigned seat numbers (if available).
- Select the '**Add Car**' or '**Add Hotel**' links to add a car rental or hotel booking.

- Review '**Totals and Restrictions**' area for price breakdown and rules/restrictions that may apply.
- Select '**Purchase**'

ITINERARY AND E-RECEIPT

Travelers will receive an email E-Receipt. **Note:** Printed itineraries cannot be used as a receipt, only E-Receipt serves as the true receipt. Please allow up to an hour to receive your email receipt.



CONCUR

Quick Reference Guide for the Travel Arranger/Assistant

(Terms can be used interchangeably)

Concur is the online travel booking tool approved by UW System.

Fox World Travel has customized Concur for UW campuses.

Log into Concur at: <http://portals.foxworldtravel.com/University>

You must have a user profile established in Concur to make reservations. Visit <http://web.uwsa.edu/travel/procedures/> to self-register or contact your Institutional Travel Manager for assistance.

TRAVEL ARRANGER/ASSISTANTS PRIMARY ASSISTANTS

- Travel Arrangers/Assistants are able to make reservations on behalf of someone with a Concur profile in place.
- A traveler can have more than one arranger/assistant.
- An arranger/assistant can book for more than one traveler.
- A traveler can designate **ONE** arranger/assistant as a **primary assistant**.
- The primary assistant will always receive an email copy of the itinerary for the traveler, regardless of who made the reservation (primary assistant, other travel arranger/assistant or traveler).
- The primary assistant is able to modify the traveler's profile as needed.
- The primary assistant **MUST** have an office/work telephone in their profile.

Important: Travel Arrangers/Assistants can book for other profiled travelers. Travel Arrangers/Assistants that have been given coordinator access can book for others and for non-employee guest travelers. Coordinator status must be given by the campus Concur Administrator.

CONCUR FEE SCHEDULE

An additional \$11.00 Agent-Assistance service fee will apply any time a Fox travel agent must assist you with your self booking or answer questions about your self booking.

- **Self Service** (no agent assistance) = \$7.25 + \$2.00 airline mandated pass-through charge (GDS)
- **Agent-Assistance** (book in Concur and phone Fox World to have agent assist with the reservation) = \$18.25 + \$2.00 airline mandated pass-through charge (GDS)
- **Guaranteed Payment/Direct Connect** - Airline ticketing policy requires tickets booked with the following 'Guaranteed Payment' carriers to be 'agent assist' resulting in the 18.25 service fee:
 - **AirTran Airways** • **Jet Blue** • **Southwest** • **Spirit** • **Air Canada**
- **Full Service** calling Fox World travel directly (no booking via Concur) will be charged a non-contract, full service fee of \$29.00 + \$2.00 airline mandated pass-through charge (GDS)

Comments for the Travel Agent (optional)
Special Requests may incur a higher service fee.

Please book same ticket for my Travel Companion - Jane Smith. Call me at 608-222-1234 for ticketing and name details.

The employee's **service fee will be at the Agent Assisted rate \$18.25 + \$2.00** The agent handling your reservation will "clone" the employee reservation that you made in Concur to book the non-employee, "companion" ticket. The **non-contract travel agency fee of \$29.00 + \$2.00 airline mandated pass-through charge (GDS)** will be charged for the non-employee's ticket and must be paid for using a personal form of payment of the traveler.

Or, you may phone Fox World Travel at **866-230-8787** to make the reservation for the non-employee travel companion. The agent handling your call will "clone" the employee reservation that you made in Concur to book the non-employee, "companion" ticket. The **non-contract travel agency fee of \$29.00 + \$2.00 airline mandated pass-through charge (GDS)** will be charged for the non-employee's ticket and must be paid for using a personal form of payment of the traveler.

FINDING HELP

- Select 'HELP' from the Concur navigation bar to display quick links to online help information.
- Visit our Corporate Travel Center for policy & procedural information <http://portals.foxworldtravel.com/University>

Fox World Travel Online Support Desk

Monday - Friday 8:00A-5:00P CST

Phone: 866-230-8787

or email: online@gofox.com

No fees charged for Online Support Desk assistance

For Reservation Assistance Call

Fox World Travel

Monday - Friday 7:00A-7:30P CST


Phone: 866-230-8787

MY TEMPLATES

- A 'Trip Template' is a record of a trip that you can use at a later date to make travel reservations for the same trip and travel cities, speeding up the reservation process. This is especially handy if you book for several employees traveling to the same location or you have employees that take the same trip repeatedly.
- You can use any prior trip that you've arranged for yourself or others to create a template.
- To create a 'Personal Travel Template', click on the 'Add New Template' link. New templates can be created from an empty template or by using an existing trip.
- To use a trip template, select 'Templates' from the Concur navigation bar. Select a trip from the list of Personal Travel Templates that you've set up. **ITINERARY AND E-RECEIPT**

Travelers will receive an email E-Receipt. **Note:** Printed itineraries cannot be used as a receipt, only E-Receipt serves as the true receipt. Please allow up to an hour to receive your email receipt.

- Click on the 'Book' link next to the template you wish to use. Enter new dates. Concur will use your pre-defined details to book your trip.
- Click on the 'Edit' link next to the template if you wish to change some of the pre-defined information (e.g., Time of travel).



Travel Templates

You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.

You may view itineraries and book travel for the following people using their templates:

Never, William J. (FWT User) [Search]

Personal Travel Templates -- William Never			
+ Add New Template			
	Template Name▲	Created by	Description
Edit	Book Trip from Chicago to Seattle	Never, William	
Edit	Book Trip from Minneapolis/St. Paul to Chicago	Never, William	
Edit	Book Trip from Tampa to Knoxville	Never, William	

BOOKING FOR NON-EMPLOYEE TRAVEL COMPANIONS

If you are booking a reservation for an employee who would like to take a travel companion on the trip, you may assist in the booking, but our contracted service fee cannot be extended to the non-employee unless the non-employee companion has a UW business purpose for being on the trip.

To handle this type of reservation, book the employee ticket as you would normally. Near the end of the reservation process you may enter a note into the **Comments for the Travel Agent** box on the [Trip Booking Information](#) page.

CLONE AND/OR SHARE TRIP FEATURE

Clone Trip (definition): To create a new trip for Traveler B that duplicates the exact trip that is already booked for Traveler A.

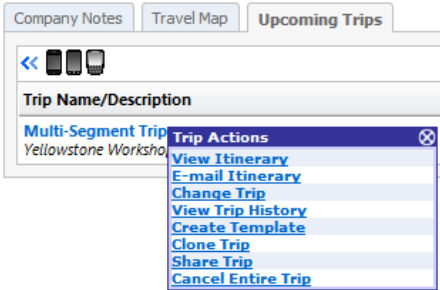
- A Traveler Arranger may choose to 'Clone a Trip' for a second traveler by selecting 'Clone Trip' from Traveler A's reservation.
- Once selected, the arranger simply selects the name of the second traveler (Traveler B) and the trip is created based on the choices selected.

Share Trip (definition): A traveler may send an invitation to another traveler within the company to join them on their trip.

- Traveler A selects 'Share Trip' > Type in the name of whom you wish to invite (i.e., Traveler B)
- Click on 'Search' if a name list is not present.
- Traveler B receives an invitation when he logs onto Concur.

Recipient may:

- Accept (Concur automatically completes a new reservation for Traveler B to match Traveler A's trip)
- Decline




Both features provide the same function, which allows creation of additional travelers on the same trip. Alterations to the trip are available during the clone trip processes.

If you are using the 'Clone Trip' feature, you must already be assigned as an 'Assistant/Arranger' in the new traveler's profile.

LOW FARE REMINDER

Concur highlights the lowest fares with a green reserve button. It is permissible to select a fare greater than the lowest logical fare but you may be prompted to select a reason for picking a higher cost flight. **Note:** The **UW Preferred Carriers** are: American, Delta, and United – discounts are displayed in Concur.

This flight is not in compliance with the following travel rules(s):

 Air Fare is greater than the least cost logical airfare plus 150 dollars

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

-- Please Choose a Reason --

Please explain why you have chosen this flight. NOTE: We will log flights which you did not take.

Text input area for explaining flight selection.