How will you be booking your travel?

The question “How will you be booking your travel?” is asked on the header of every request. How you answer this question affects workflow for the request, as well as providing the starting point for your next step in the travel process.

Troubleshooting for when the question is answered incorrectly is at the end of this document.

Six options are available to answer this question:

1. **Booking air, hotel, and/or car rental online in Concur Travel.**
   a. Select this if you are planning to book your travel in the system.
   b. Do not select this if you know you are going to call FCm or another approved travel agency to book your travel. You must call FCm under these circumstances:
      i. International travel – FCm can provide rates to you by calling that are unavailable in the on-line booking process.
      ii. Flying on different airlines in a single trip.
   c. Do not use this selection if you are booking guest travel. (Guests do not have Concur logins.)
   d. Do not use this selection if you have already booked your travel, either in Concur or outside of Concur.
   e. By selecting this, the following workflow will occur:
      i. Your travel supervisor, as defined in HR, will receive the request to approve.
      ii. Once approved, a blue book link will appear to the right of the request on the Active Request page.
      iii. Click on the blue book link to begin booking your travel. This ties the travel to the request.
      iv. Once online booking is complete, the blue book link will be replaced with a blue expense link. When you are ready to start your expense report, click on the blue expense link to tie your request to your expense report.

2. **Booking outside of Concur Travel.**
   a. Select this if you are planning to book your travel by calling FCm, working with another approved travel agency, or booking online but not through Concur Travel.
   b. Select if you know you are going to call FCm or another approved travel agency to book your travel. You must call FCm under these circumstances:
      i. International travel – FCm can provide rates to you by calling that are unavailable in the on-line booking process.
      ii. Flying on different airlines in a single trip.
   c. Do not use this selection if you are booking guest travel. (Guests do not have Concur logins.)
   d. By selecting this, the following workflow will occur:
i. Your travel supervisor, as defined in HR, will receive the request to approve.

ii. Once approved, a blue expense link will appear to the right of the request on the Active Request page.

iii. Book your travel as planned. When you are ready to start the expense report, click on the blue expense link to begin your expense report. This ties the expense report to the request.

3. Verbal Supervisor Approval – Urgent booking online in Concur.
   a. This is used in exactly the same circumstances and in the same way Option 1 is used. The only difference between these is that in this case the travel supervisor approval workflow step will be skipped. Please note that you should only use this when your supervisor has approved travel verbally. The department is responsible for keeping documentation on file substantiating this approval.

   a. This is used in exactly the same circumstances and in the same way Option 2 is used. The only difference between these is that in this case the travel supervisor approval workflow step will be skipped. Please note that you should only use this when your supervisor has approved travel verbally. The department is responsible for keeping documentation on file substantiating this approval.

5. Urgent Request created from Travel Booking – Verbal Approval.
   a. Only guest bookings should begin in the travel section.
   b. Use this when you begin a booking in travel, and are referred back to create a request.
   c. By selecting this, the following workflow will occur:
      i. Your travel supervisor, as defined in HR, will NOT receive the request to approve. Please note that you should only use this when your supervisor has approved travel verbally. The department is responsible for keeping documentation on file substantiating this approval.
      ii. Once submitted, a blue expense link will appear to the right of the request on the Active Request page.
      iii. When you are ready to start the expense report, click on the blue expense link to begin your expense report. This ties the expense report to the request.

6. Request created from Travel Booking – Needs Approval.
   a. Only guest bookings should begin in the travel section.
   b. Use this when you begin a booking in travel, and are referred back to create a request.
   c. By selecting this, the following workflow will occur:
      i. Your travel supervisor, as defined in HR, will receive the request to approve.
      ii. Once approved, a blue expense link will appear to the right of the request on the Active Request page.
      iii. When you are ready to start the expense report, click on the blue expense link to begin your expense report. This ties the expense report to the request.
What happens if you do not follow these instructions?

This list covers the most common errors in this process:

- If you begin a booking in the travel section of the website for yourself or as a delegate/arranger for another Concur user, you will be referred back to create a request. The dangers in this are:
  - If you have already created a request, your request and your booking will not be linked.
  - You will be forced to select either option 5 or option 6 for your answer to the question.
  - If you select option 6, you have a very short time period for the request to be approved by your supervisor before the booking expires. If approval is not obtained during that time, you will have to start completely over.

- If you select option 1, and then book in another way other than online in Concur, you will see the blue book link when you are ready to start the expense report.
  - You will then have to open the request, recall it, change the answer to option 2, and re-submit it for approval. Once approved, you can then start the expense report.
  - Trying to skip this step and go straight to the expense report will not work. The expense report must have an approved request attached to it before the expense report can be submitted.