

Booking Travel Guidance

The following steps will guide you through the process of booking travel. Please visit our website to learn more about Concur Travel and the University's travel provider World Travel, Inc. (WTI) and familiarize yourself with the requirements and restrictions involved when booking travel: [Concur Requests & Travel](#)

Note: If you are booking travel on behalf of a faculty or colleague, they need to set up their Concur profile if they haven't done so already by following Step 1. They also need to designate you as their Travel Delegate and once you have been designated as their Travel Delegate, select the "Acting as other user" functionality before you start making travel arrangements in Step 2.

Step 1: Setup Your Concur Profile

Set up your Concur profile in order to book travel with Concur or make yourself eligible to receive travel and expense reimbursements. If you have already set up your Concur profile there is no need to take any additional action and can continue to the next step. If you haven't had the opportunity to set up a Concur profile, please follow these guidelines: [Setup Your Concur Profile](#)

Step 2: Submit Your Pre-Trip/Advance Request

Pre-trip approval is required in order to book business travel and get reimbursed for travel related expenses when traveling on University business. If travel is booked without a pre-trip, you must submit a pre-trip request post travel and include a justification in the "Comment" section of the pre-trip request. You will not be able to submit an Expense Report without obtaining pre-trip approval beforehand. Watch this video demonstration [Submitting a Pre-Trip Request](#) and be sure to follow the following guidelines when submitting your pre-trip/advance request: [Submit Your Pre-Trip/Advance Request](#)

Step 3: Book Your Business Travel

Travelers can book their business travel using self-service via the Concur Online Booking Tool or over the phone with a WTI travel counselor, please visit our site for more details: [Book Your Business Travel](#)
Watch the following video to learn how to book travel using WTI travel self-service via the Concur Online Booking Tool:

Video: [Using Concur Travel to Purchase International Air, Hotel, and Rental Car \(with Narration\)](#)

Step 4: Reconcile Your Pre-Trip/Advance Request

Reconcile the approved pre-trip/advance request by creating an Expense Report from the approved Request or by importing the Request into an Expense Report already created (Job Aid below), and assign your active transactions to the Expense Report (Concur Tip below). Please follow our [Expense Report Guidance](#) when completing the report header of your Expense Report and be sure to: (1) use the naming convention, (2) provide the speedchart key and speedchart description, and (3) include an adequate and legitimate business purpose.

Job Aid: [Reconciling Pre-Trip and Travel/Cash Advance Requests](#)

Concur Tip: [Assigning Your Transactions to an Expense Report](#)