If an authorization will need reservations, best practice is to create reservations FIRST on the TRAVEL tab.

Creating Reservations (Which Will Create an Authorization)

This section describes the procedures you use to create a travel reservation. You must complete the following tasks:

- Review the travel policy for your agency.
- Book air, car and hotel reservations, and review your itinerary.
- Review and make changes to your trip authorization. Once you book a reservation, an authorization is automatically created and contains the reservation information.

Review Your Agency's Travel Policy

Before booking new reservations and creating an authorization, review the travel policies from GSA. If you have questions, contact your travel administrator. To review your agency’s policy:

- From the Home page, click Travel, and then click Policy.

Booking a Reservation

CGE provides several access points to begin booking a reservation. From the Home page, in the I Want To... section, click Create or Change a Reservation, or click the Travel tab.

On Travel tab, click Arrangers option. (NOTE: The screen shot below doesn't show the Arrangers option because the arranger has not yet searched for a traveler's name.)

The following screenshot was taken from the same screen AFTER the search function was used.
1. Verify that the correct traveler is at the top of the screen.
2. Enter the **TDY location** (where the traveler will be working) in the yellow box, then click the **Find Location** button.
3. Choose the correct TDY location in the pop up box. If there is more than one county, choose the correct county in the drop down box at the bottom of the yellow TDY box.
4. Enter the **Departure Airport City/ Airport Code** and the **Arrival Airport City/ Airport Code**. You can use the filter options to narrow down the flight results or you can search for all flights and filter on the flight results page.
5. A calendar pop up will appear when you click in the Date boxes; select correct departure and return date (single arrows will move by month; double arrows will move by year).
6. If the traveler needs a rental car and hotel, select the check boxes.
7. Can use the **Hotel Search Function** box to search for hotels close to a Reference Point or Airport or Address or Zip Code or by Hotel Name.
8. Click **Search** button at the bottom of the screen.
9. Another screen will appear with a green bar at the top – when the green bar disappears, Concur has finished searching and the results will display below.
### Orange navigation bar at the top of the screen shows your progress.
### Baggage fees policy gray link will pop up a box with all baggage fee policies for each airline
### Matrix (grid) can be used to sort flight results
### Show fare display legend blue link will display a box with explanations for each symbol by the flights (see next page)
### Shop by fares shows every round trip flight for each departure/arrival airport searched
### Shop by schedule tab allows you to search by Outbound then Return flights (you’ll have to price them AFTER you select the flights)
### To book a flight, click on Fares or Reserve (Fares will have more than 1 price for the flight; reserve means there is only 1 price for that flight – see next page)
### The right hand side of the screen can be used for changing the search details or filtering the flight results.
### If you are searching multiple airport, select Depart/Return Same Airport Only under Display Settings
### Can filter by departure/arrival airport and/or connecting airport
### Green, yellow, or red color code system is like a traffic light; green = within policy; yellow = outside of policy and will need a justification in order to book the flights; red = cannot book flights - must choose other options

## Flight Options:

- **Govt Contract** = city pair fares/contract carriers (fully refundable, fully transferrable, must select these according to the FTR)
- **Govt Discounted** = city pair fares/contract carriers (capacity rates, fully refundable, fully transferrable, airline is offering them at a discount to get seats filled; basically a cheaper city pair)
- **Non-Contract Government** = not official city pairs; non-contract fares (non-contract but labeled as government to try to trick you - different fare rules)
- **Lowest Published** = fare offered to the general public (restricted, non-refundable fares)
The following screen shot shows the Show Fare Display Legend:

- Government Contract
- Non-Contract Government
- Ticket is refundable
- Flight/Train arrives on a different day
- Short or long connection time
- Turboprop plane
- Least Cost Logical Fare
- This option is Fly America Act compliant
- Gogo Wi-Fi 50-99% coverage
- Gogo Wi-Fi 100% coverage

The following screenshot shows the expanded details for a flight:

**NOTE:** If you select a Gov. Contract when a Gov. Contract (Refundable) ticket is available, the Reserve button will turn yellow and you will need to justify why you are choosing the higher cost ticket. Both are city pairs - fully refundable and fully transferable - the discounted rate is just cheaper.
Select either the IBA (Individually Billed Account) or the CBA (Centrally Billed Account) and then click Next. Remember, only travel for people who do not have travel cards (i.e. invitational travelers or visiting scientists) should be booked on the CBA. Once you select the form of payment, click the Next button at the bottom of the screen.

**NOTE:** The Start Over button will completely cancel everything you have done. Any buttons that say Start Over or Cancel do not take you back to the previous screen, but rather cancel all reservations.
Matrix (grid) can be used to sort rental car search results.

The right hand side of the screen can be used for changing the search details or filtering the rental care search results.

Green, yellow, or red color code system is like a traffic light; green = within policy; yellow = outside of policy and will need a justification in order to book; red = cannot reserve car - must choose other options.

Can change search by using “CHANGE CAR SEARCH” on the right hand side of the screen.

Can skip rental car by clicking SKIP CAR at the bottom of the page.
• Click the red stars on the map to see popup windows with the hotel names that have FedRooms
• NOTE: FedRooms need to pass a lot of inspections to have a FedRooms qualification so they are always good rooms to select
• The red balloon shows the ‘city center’ if you searched for hotels in a city
• The per diem rate is shown right under the map
• The prices show the lowest and highest cost for each hotel
• Can change search by using “CHANGE SEARCH” on the right hand side of the screen
• To choose a hotel, click “CHOOSE ROOM” and a list of rooms available will appear
• If there is a FedRooms, choose the radio button next to that room and click on RESERVE
• NOTE: If you choose a room above per diem, you will need to justify why you are picking that room (the authorization will subtract the amount that’s above per diem unless you choose ACTUAL)
The **Trip Booking Information** page displays. Enter the following information then click Next button:

- **Trip Name**: Add the traveler’s name at the beginning and leave the rest of the text.
- **Trip Description**: Conference/Training/Mission Name - Dates - Organizer.
- **Comments for the Travel Agent**: LEAVE BLANK; will cause a higher ticketing fee.
- **Trip Purpose**: Drop down menu; Conference Name will pop up an additional box with a drop down list of Conference Names (the Travel Policy and Systems Branch add these names; if you don’t see the Conference Name you need, contact your Travel Specialist) - you can change the Trip Purpose in the actual authorization, so you can update later if needed.
- **City Pair fares book 3 days prior to travel. If you would like the flights to be ticketed early, check the box next to “Ticket City Pair Program Fare 10 business days before travel after approval.”

**NOTE**: **Display Trip & Previous** take you to the previous screen; **Hold Trip** will allow you to hold the reservations; **Next** will take you to the Confirm Booking page and **Cancel** will completely cancel everything.

### Trip Booking Information

Click “Next” or “Confirm Booking” to complete your reservation.

The trip name and description are for your record keeping convenience. If you have any special requests for the travel agent, please enter them into the agent comments section.

**Trip Name**

This will appear in your upcoming trip list.

| Trip from Denver to Washington |

**Trip Description** (optional)

Used to identify the trip purpose.

**Comments for the Travel Agent** (optional)

Special Requests may incur a higher service fee.

Send a copy of the confirmation to: *

Send my email confirmation as

- [HTML](#)  
- [Plain-Text](#)

- Ticket City Pair Program Fare 10 business days before travel after approval

**Trip Purpose [Required]**

You may HOLD this reservation until: 10/12/2015 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 OVERVIEW SCREEN

- If you hold the trip, this is the screen that you will see first after re-entering the reservations
- Shows summary of everything you’ve done so far
- Can edit the reservations from this screen. Click the CHANGE button next to the flights/car/hotel and it will take you back to the search results page to select another flights/car/hotel
  - At the bottom of this screen are several buttons:
    - NEXT – click to finalize the trip
    - CANCEL – click to CANCEL ALL RESERVATIONS AND TAKE YOU BACK TO THE TRAVEL HOME SCREEN
- If you click next, you will get a second screen that looks the same, but you will not be able to make changes
  - Click CONFIRM BOOKINGS on the bottom of the screen to finalize the reservations
- The CONFIRM BOOKINGS button is the final step of the reservations. Now Concur is feeding all the reservations information into an authorization.

TO CHANGE A RESERVATION

- Go to the TRAVEL TAB
- Click UPCOMING TRIPS sub tab in the middle of the screen
- Click on the name of the trip that needs updates (blue link)
- Will take you to the trip overview screen where you can make changes to reservations
Finalizing an Authorization after Reservations

Once reservations have been confirmed, Concur will feed the reservations into an authorization. (NOTE: If you got interrupted and aren’t sure if reservations were fed into an authorization, you can tell that has happened on the TRAVEL TAB – UPCOMING TRIPS sub tab in the middle of the page. There will be an authorization number if the reservations are confirmed and have been fed into an authorization.)

If you did not get interrupted and have just stamped CONFIRM BOOKINGS, the screen will refresh and you will automatically go to the authorization tab and will see the SUMMARY tab of the authorization. OUR SUGGESTION IS TO GO TO THE GENERAL TAB FIRST as there is important information that MUST be filled in before the authorization will allow you to stamp it signed so best to fill it in first.

SUGGESTED ORDER OF AUTHORIZATION TABS: GENERAL, EXPENSES, EXCEPTIONS (if foreign), ACCOUNTING, SUMMARY (to review and upload receipts), CONFIRMATION (which will automatically perform pre-audits)
GENERAL TAB

DOCUMENT INFORMATION SUB-TAB
- Choose trip code
- Choose trip purpose
- Document description = Conference/Training/Mission Name – Dates – Organizer
- Accounting codes will populate from the Accounting tab – no need to fill those in

TRIP INFORMATION SUB-TAB
- Arrival and departure date and Itinerary Location (TDY location) will be filled in from the reservations you created
- To update the TDY location, either:
  - Type in a city and click on the Search; the city will populate with a drop down box below to show the different cities
  - Click the binoculars and choose the location from the drop down menu
- If you need to change the dates, use the Itinerary Locations at the bottom of the screen then click SAVE CHANGES in the upper right hand corner.
- Choose depart and return location as RES (residence) or the duty station (Beltsville, MD in the screen shot)
- Can add comments and choose purpose again if you want – be sure to save comments
- The dates at the top of the screen will auto update if you change the dates at the bottom of the screen
**EXPENSES TAB**

**TO ADD EXPENSE:**
- Click on ADD EXPENSE button on the left hand side of the screen
- Use the workspace on the right hand side of the screen to choose the expense
- You can choose the method of payment (which will also become the method of reimbursement on the voucher so if you know the traveler will want to be reimbursed to the travel card, you can choose it at this time – can also be changed on the voucher)
- For any expense, you can add comments by clicking on SHOW OTHER DETAILS
- Click the SAVE button – upper right
- On the left, the expense will show up in faint purple
- To add another expense, click ADD EXPENSE (otherwise, you will over-write the expense you just added)
- Anything marked with "RO" is read only and can't be changed or deleted
- TDY Voucher Fee is the Concur fee for processing a voucher – will be RO
- Trip Fee is the BCD fee for processing reservations – will be RO

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/05/14</td>
<td>TDY Voucher Fee</td>
<td>14.75</td>
<td>RO</td>
</tr>
<tr>
<td>08/17/14</td>
<td>HOTEL TAXES</td>
<td>15.00</td>
<td></td>
</tr>
</tbody>
</table>

**TO DELETE EXPENSE:**
- Check the box in the DELETE column in the correct expense row
- Remember, anything marked as “RO” is read only and can't be deleted
- Lodging and M&IE can't be deleted – see next section to mark lodging and M&IE as in kind
- Click DELETE SELECTED EXPENSES at the very top or bottom of the left hand side of the screen
TO SHOW LODGING OR MEALS ARE BEING PROVIDED IN-KIND:

- Click the pen and paper on the left hand side of the screen next to the lodging/M&IE that is being provided
- The expense will populate in the workspace in the right hand side of the screen
- For LODGING:
  - Zero out the lodging cost
  - Click SAVE button – upper right
- For M&IE
  - Click SHOW PER DIEM CONDITIONS
  - Click MEALS PROVIDED
  - Select the meals that are being provided
  - See print screens below – the cost of M&IE will update
  - If all meals are being provided, Concur will still leave the “Incidentals”
- On the left, the expense will show up in faint purple
- To add another expense, click ADD EXPENSE (otherwise, you will over-write the expense you just added)
- Anything marked with “RO” is read only and can’t be changed or deleted

TO MARK DAYS AS ANNUAL LEAVE:

- Click the pen and paper next to M&IE on the day that needs to be marked as annual leave
- Click on SHOW PER DIEM CONDITIONS
- Select leave
- Click SAVE – upper right
- Lodging and M&IE will zero out for the day that’s marked as annual leave
TO REQUEST ACTUAL LODGING:
- Click the pen and paper on the left hand side of the screen next to the lodging that needs to be actual
- The expense will populate in the workspace in the right hand side of the screen
- Click on SHOW PER DIEM CONDITIONS
- Select ACTUAL LODGING
- Click the SAVE button – upper right
- Selecting actual lodging will cause a pre-audit flag
- If the actual lodging request is for a pre-approved actual rate from the Department for large meetings:
  - Be sure to include the name of the conference, the rate, the number of nights approved as the justification for the actual lodging
- If the actual lodging request is NOT for a pre-approved actual rate from the Department for large meetings:
  - Include a justification from the traveler as to WHY actuals is being requested

WHAT HAPPENS WHEN LODGING IS SELECTED ABOVE PER DIEM AND ACTUALS IS NOT REQUESTED – “LODGING OWED BY TRAVLER” SUBTRACTS AMOUNT THAT IS ABOVE PER DIEM AND IS READ ONLY (“RO”):
Creating an Authorization without Reservations

- Hover over the AUTHORIZATION tab
- Click on New Authorization
- Make sure the correct traveler is showing in the center of the page
- Select AUTH as the DOCUMENT TYPE
- Click CREATE DOCUMENT

FILLING IN TRIP INFORMATION (WILL BECOME THE GENERAL TAB)

DOCUMENT INFORMATION SUB-TAB (see next page for print screen)
- Choose trip code
- Choose trip purpose
- Document description = Conference/Training/Mission Name – Dates – Organizer
- Accounting codes will populate from the Accounting tab - no need to fill those in

TRIP INFORMATION SUB-TAB (see next page for print screen)
- Look at the bottom of the screen to the ITINERARY LOCATIONS
  - Use the calendar to select the trip dates
    - Arrival Date is the first day of the trip
    - Departure Date is the last day of the trip
  - Itinerary Location = TDY location
  - To choose the TDY location, either:
    - Type in a city and click on the Search; the city will populate with a drop down box below to show the different cities
    - Click the binoculars and choose the location from the drop down menu
- Now look at the top of the screen
  - Choose depart and return location as RES (residence) or the duty station (Beltsville, MD in the screen shot)
  - Can add comments and choose purpose again if you want – be sure to save comments
- Click CREATE DOCUMENT in the upper right hand corner; the information you just filled in is now the GENERAL tab
- From here, continue to fill in the authorization (EXPENSES, EXCEPTIONS if foreign, ACCOUNTING, SUMMARY, CONFIRMATION)
DOCUMENT INFORMATION SUB-TAB

Choose dates and itinerary location first at bottom of screen (dates at the top of the screen auto-fill)

TRIP INFORMATION SUB-TAB

Then choose depart/return location from upper right section of screen using drop down boxes which will auto-fill the left side of screen.
Multiple TDY Locations - Reservations

- Click on TRAVEL tab
- Select MULTI-SEGMENT in the very top section
- Enter the first TDY location
  - Enter the first departure airport and arrival airport
  - Enter the departure date
  - Choose if you need a car and/or hotel for the first segment
- Enter the second TDY location
  - Verify departure airport from first TDY location and arrival airport of second TDY location
  - Choose the departure date of when the traveler is leaving TDY location 1
  - Choose if you need a car and/or hotel for the first segment
- If there are only two TDY locations, enter a third TDY location of the traveler's HOME/DUTY STATION
  - This will NOT give per diem, but it's necessary to end the trip
  - So if there are 3 TDY locations, you will need to enter 4 TDY locations on this screen with the last TDY location being the home location
  - Otherwise, Concur will not realize the trip is ending
- Verify the departure airport from TDY location 2 and the arrival airport back home
- Enter the final date of travel (the date the traveler is flying home)
MULTI-SEGMENT SEARCH RESULTS SCREEN

- Default view is SHOP BY FARES
- For multi-segments, you will choose all flights on one flight results screen (NOTE: for hotels and car rentals, there will be a different screen for EACH segment, so for 2 TDY locations, there will be 2 hotel results screens that you will need to navigate through and 2 car rental results screens if needed)
- The flights for all segments will appear on the flight search results screen
- Can filter times for each segment
- Can filter departure/arrival airports for each filter
- Can also filter connecting airports for each segment (if there are layovers)
- Might be easier to SHOP BY SCHEDULE for multi-segment trips

SHOP BY FARES PRINT SCREEN

<table>
<thead>
<tr>
<th>Airline</th>
<th>Departure</th>
<th>Arrival</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southwest</td>
<td>BWI</td>
<td>DEN</td>
<td>$697.00</td>
</tr>
<tr>
<td>Southwest</td>
<td>BWI</td>
<td>SAN</td>
<td>$1,218.80</td>
</tr>
</tbody>
</table>

SHOP BY SCHEDULE PRINT SCREEN

- There will be a tab for each segment
- Choose a flight for segment 1
- The flight will move to the top of the screen and Concur will move you to the tab for segment 2
- Choose a flight for segment 2 and the flight will move to the top of the screen and Concur will move you to segment 3
Multiple TDY Locations - Authorization Only

- Hover over the AUTHORIZATION tab
- Click on New Authorization
- Make sure the correct traveler is showing in the center of the page
- Select AUTH as the DOCUMENT TYPE
- Click CREATE DOCUMENT

FILLING IN TRIP INFORMATION (WILL BECOME THE GENERAL TAB)

DOCUMENT INFORMATION SUB-TAB (see next page for print screen)
- Choose trip code
- Choose trip purpose
- Document description = Conference/Training/Mission Name – Dates – Organizer
- Accounting codes will populate from the Accounting tab - no need to fill those in

TRIP INFORMATION SUB-TAB (see next page for print screen)
- Look at the bottom of the screen to the ITINERARY LOCATIONS
  - Use the calendar to select the trip dates for each TDY location
    - Arrival Date is the first day of the trip
    - Departure Date is the last day of the trip
  - Itinerary Location = TDY location
- To choose each TDY location, either:
  - Type in a city and click on the Search; the city will populate with a drop down box below to show the different cities
  - Click the binoculars and choose the location from the drop down menu
- Now look at the top of the screen
  - Choose depart and return location as RES (residence) or the duty station (Beltville, MD in the screen shot)
  - Can add comments and choose purpose again if you want – be sure to save comments
- Click CREATE DOCUMENT in the upper right hand corner; the information you just filled in is now the GENERAL tab
- From here, continue to fill in the authorization (EXPENSES, EXCEPTIONS if foreign, ACCOUNTING, SUMMARY, CONFIRMATION)
DOCUMENT INFORMATION SUB-TAB – Multiple Locations

Choose dates and itinerary location first at bottom of screen for first TDY location. Then choose dates for second TDY location without missing dates. If you need more than 5 TDY locations, click Add additional rows in the upper right hand corner. The dates at the top of the screen will auto fill in.

Then choose depart and return selection from the drop down menu in the upper right hand corner which will auto-fill the left hand side of the screen. When finished, click CREATE document in the upper right hand corner (which is not pictured in the above print screen, but it is above the sub tab names).