BOOKING GROUP TRAVEL IN CONCUR

Group Travel is defined as a Concur User (Cal State University Monterey Bay employee with Concur Access) paying on behalf of others (students or non-employees).

Role of the Group Leader

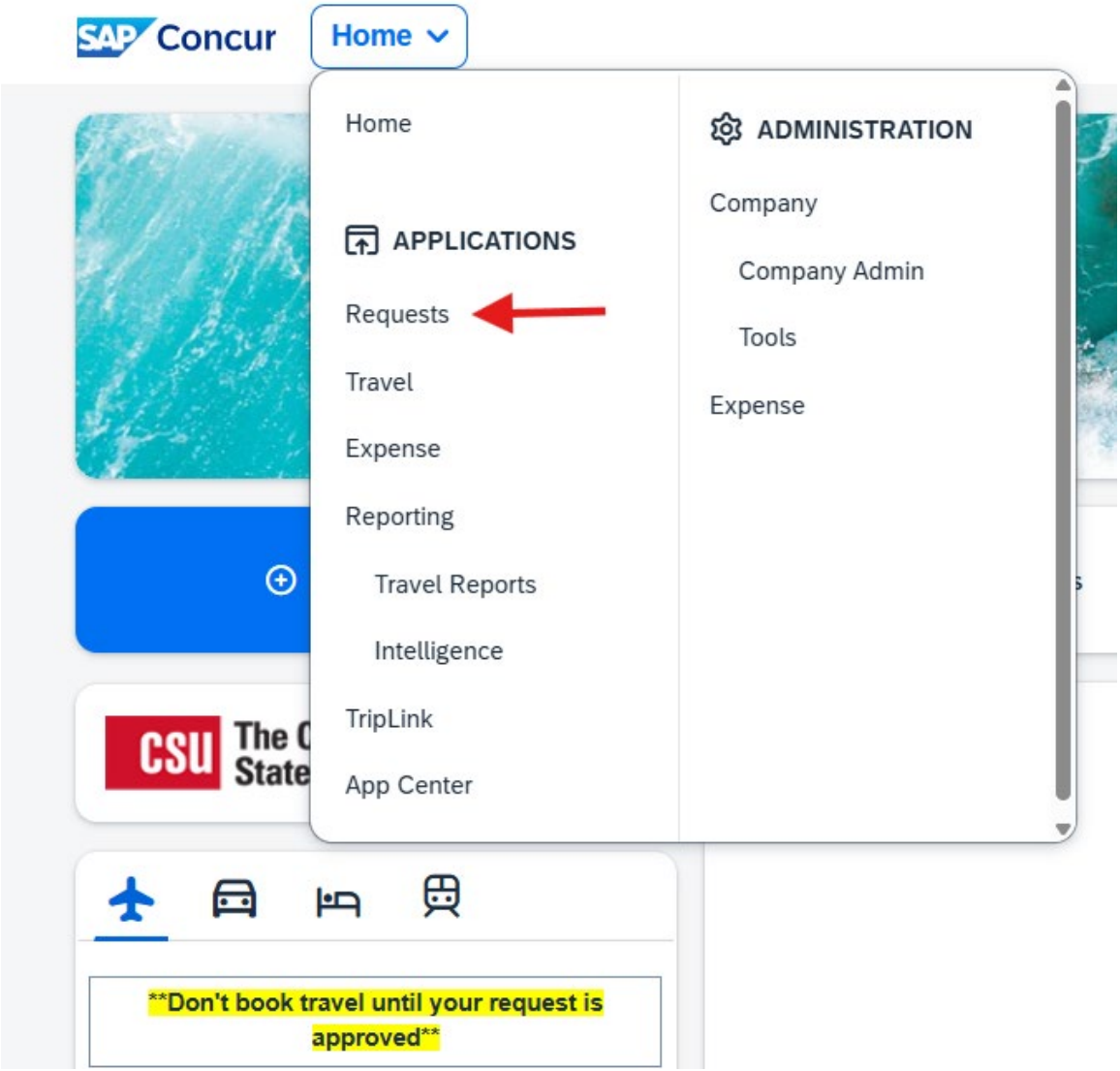
A group leader is an employee who will be accompanying students on a trip. The group leader will submit **only one** Concur travel request and expense report on behalf of the students and themselves. If additional employees are also traveling, they will each need to submit their own individual Concur travel request and expense report.

Booking Tips for Group Travel

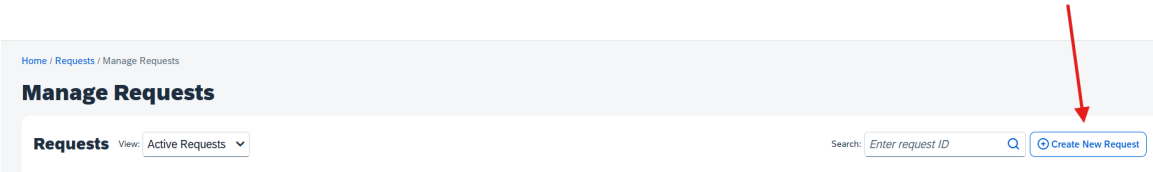
Concur's Trip Search booking feature is designed for individual employee travel. To book airfare for group travel, please contact Christopherson Travel Agency. Contact information can be found on the Concur Dashboard under Company Notes. Note that there is a fee when contacting Christopherson for inquiries/booking arrangements. If you are unsure of how to book travel arrangements for group travel, please contact travel@csumb.edu for more assistance.

To book a Group Travel Request in Concur:

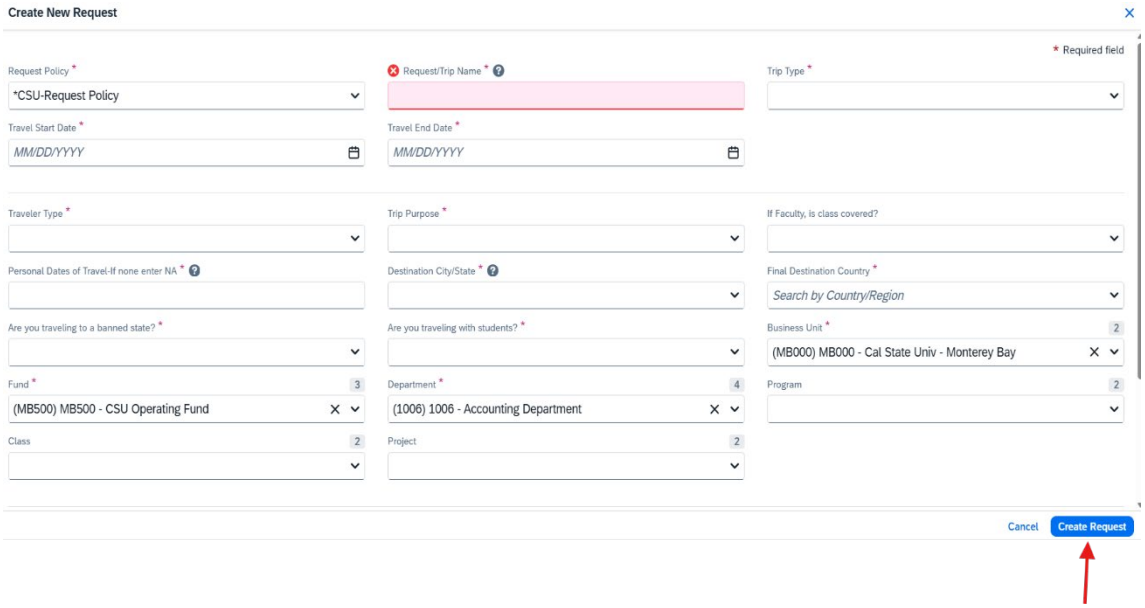
1. Log into Concur via the Dashboard and click ‘Request’ in the drop- down menu at the top:



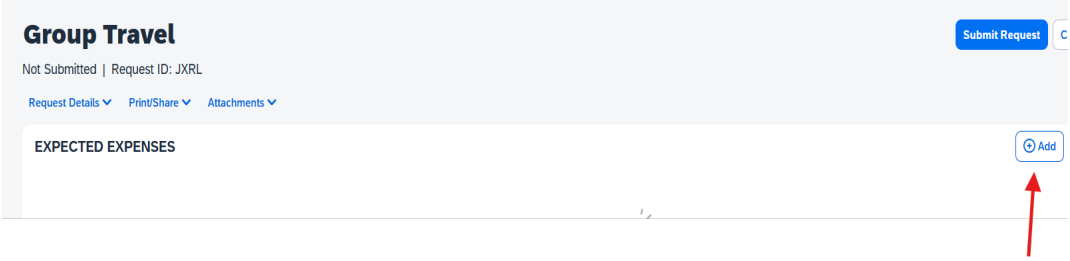
2. Click ‘Create New Request”:



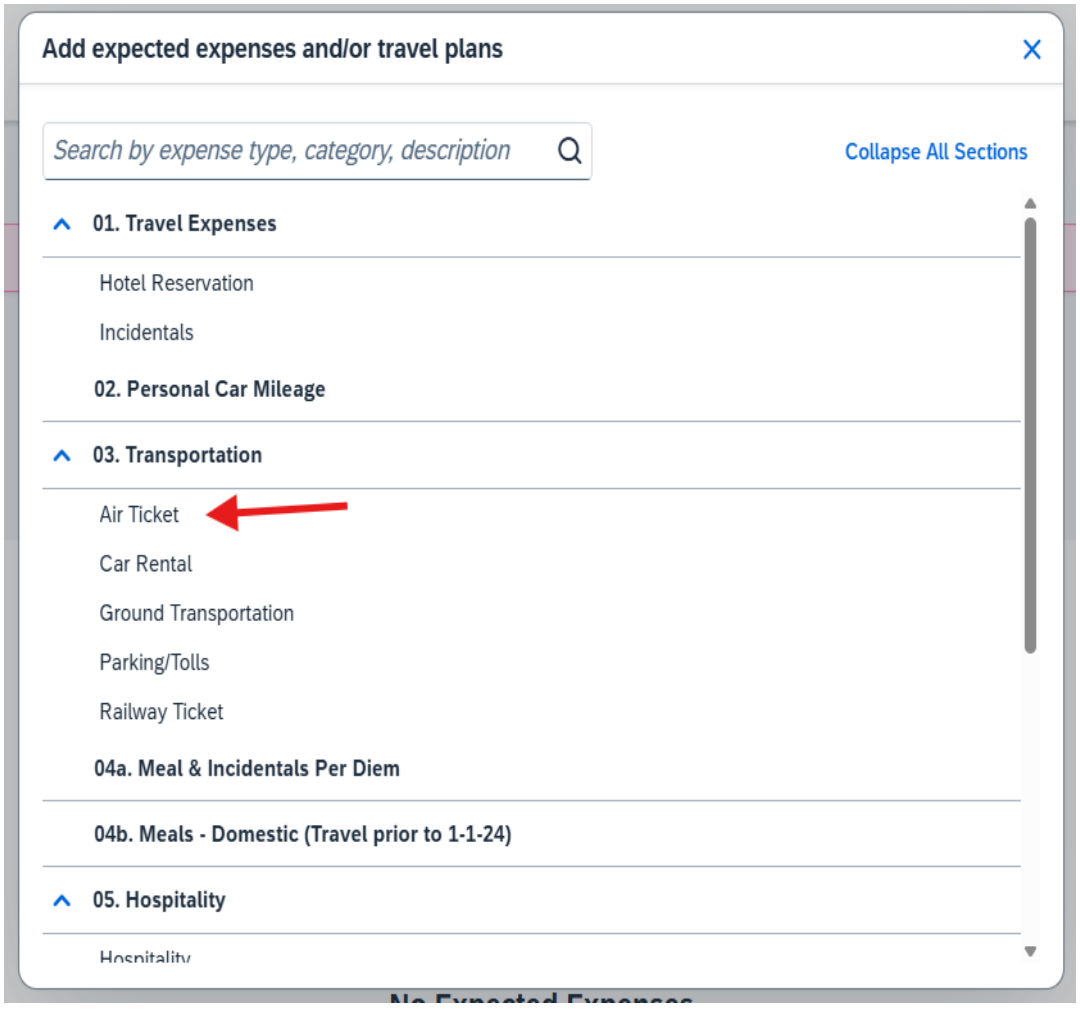
3. Complete the Request Header, filling in all fields with a red asterisk. Be sure to add Comments regarding the trip details at the bottom of the header. (Note: The Business Unit and other chartfield information are auto-filled. Contact your Department Admin for assistance if needed.) When the Request Header information is complete, click 'Create Request':



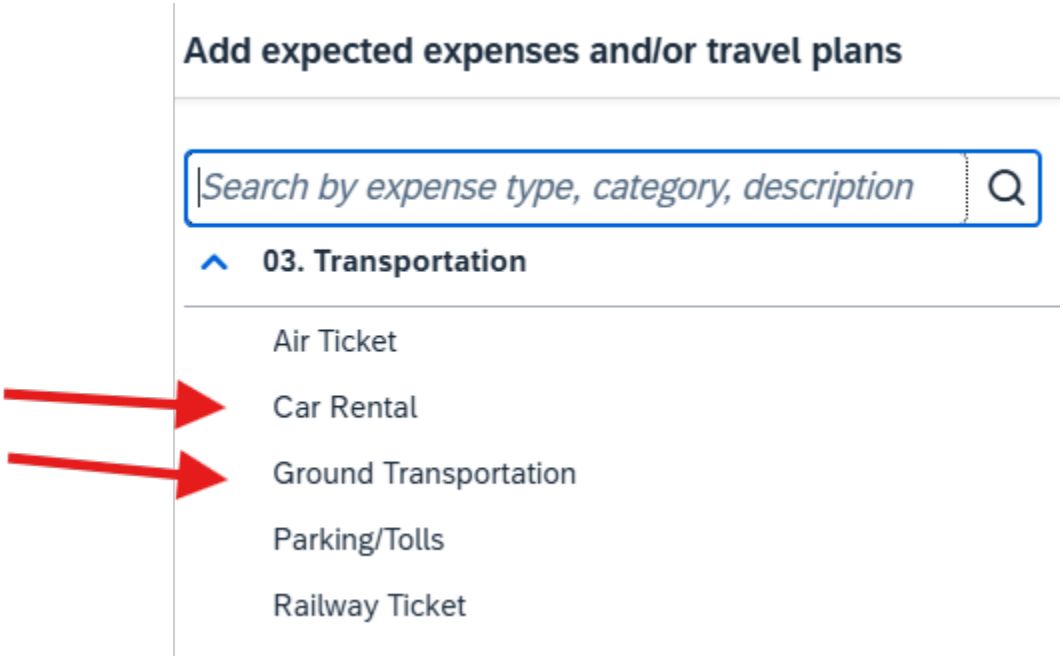
4. Next, add the Expected Expenses to build the best estimate of the Team/Group Travel trip. Click 'Add' within the Request, select an expense to add, or type in your expense type in the search bar at the top to locate what you need. Next steps will include some examples of expense types to add for team/group travel.



A. Airfare: To add the <u>total cost</u> of flights for your group, click the '**Air Ticket**' expense type. On the next screen, enter the total expected amount for <u>ALL</u> of the flights in the group and click **SAVE**:



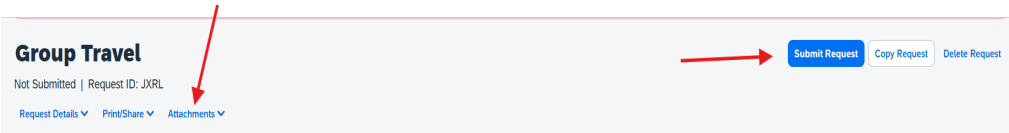
B. **Car Rental or Ground Transportation** (includes Uber/Lyft or Taxis). Click the expense type needed and add the total for the whole trip (estimation) and click **SAVE**:



C. **Accommodations:** To add the cost of multiple hotel rooms or Airbnb/VRBO rentals, scroll to the bottom of the expense types and select '**Other Accommodation'** expense type. This will allow you to enter in the total cost for all rooms. Under **COMMENTS**, add the cost per person per night (must be under $333 per person before taxes), click **SAVE:**

D. Meals: To add the cost of meals for the group, select the **Team/Group Meals** expense type**.** Add the total estimated cost of meals for the trip. Under **COMMENTS**, provide information regarding the cost per person/per day. Click **SAVE:**

5. Once you have completed entering your estimated expenses, attach any supporting documentation (agendas, trip justification/purpose email confirmation, flyer, etc.). Review the alerts at the top of the page to ensure compliance and completeness. Once you are satisfied all components of the trip request are complete, click '**Submit Request**'.



The travel request will be routed to the corresponding Department Budget Analyst for approval and the traveler's Manager/Reports to Supervisor, with final approval to be done by the Travel Admin.

Once you receive an email notification from Concur that you have an Approved Request, you can begin booking your travel*.

*Note: Only Registration and Hotel bookings may be booked prior to full Request Approval (if needed) to secure best rates.