TravelSmart Program

User Guide

Table of Contents

1.0   PROGRAM OBJECTIVES

Simon Fraser University has partnered with Direct Travel to provide a streamlined process for booking business or personal travel. The TravelSmart program is available to all SFU faculty and staff. Please note all travel must fall in line with SFU's business and travel expense policy.

2.0   BENEFITS

- Offers discounted rates on flights, hotels, and car rentals
- Shows live pricing at various companies
- Built in duty of care
- More flexibility
- Discounted booking fees
- Eliminates paper

3.0   CREATING A PROFILE

The TravelSmart program coordinator will create a username for you and you will receive an email with a link to create your profile.

You have one week to change your password and update your profile before the link expires. If you are not able to create it within that time frame, please contact the TravelSmart program coordinator to reset the link.

If you will be delegating another employee to book your travel, you can give them access in the "Travel Arranger" section of your profile.

Travel Arranger

Search arranger by last name or email

The travel arranger must have a travel profile before they can be given access.

If you have any issues with Concur please contact the TravelSmart program coordinator or email onlinesupportcan@dt.com
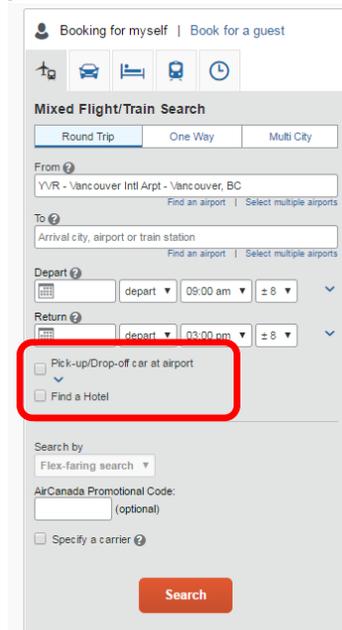
4.0   BOOKING A TRIP FOR YOURSELF

Once you log into Concur, you can select either business or personal to specify the type of trip.
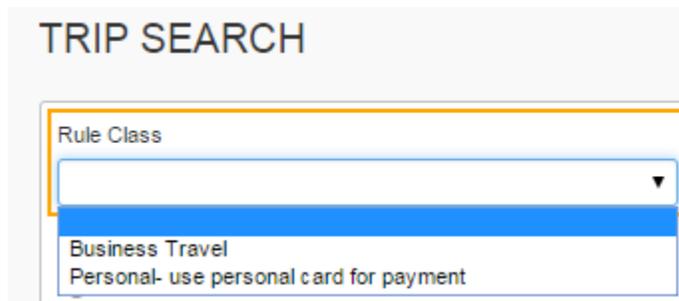
The trip search menu on the left side of the page allows you to put in your travel information to find options:

If you know that you will need to book a car or hotel, you can check off the boxes next to Pick-up/Drop-off car at airport and Find a Hotel.

Select the arrow next to the dates to search the time range and see non-stop flights displayed
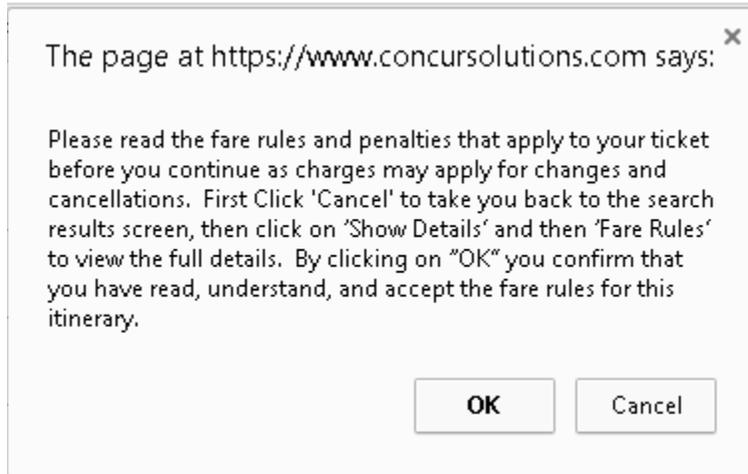

You can search for a specific hotel or for hotels based on distance.

You can narrow down the options based on airlines and number of stops.

Select a flight to view details or adjust your search on the left-hand panel.

*For Air Canada flights, there are two different options: AirCanada and Sabre. AirCanada flights are discounted and are instant purchases upon reservation. Sabre flights are a higher fare but can be held without instant purchase.

Once you have selected your flight, a fare quote will pop up showing the estimates cost with fees.

Click reserve to continue the booking or cancel to select a different flight.

If you have selected a non-refundable fare, a warning window will pop up advising you.

The page at https://www.concursolutions.com says:

Please read the fare rules and penalties that apply to your ticket before you continue as charges may apply for changes and cancellations. First Click 'Cancel' to take you back to the search results screen, then click on 'Show Details' and then 'Fare Rules' to view the full details. By clicking on "OK" you confirm that you have read, understand, and accept the fare rules for this itinerary.

OK   Cancel

You will then be brought the review screen.

Click Reserve Flight and Continue. **Please note there is an $11 fee to book through Concur.**

5.0   BOOKING A TRIP FOR OTHERS

If you are booking a business related trip for a guest, you can select the "Book for a Guest" option. This can be used for non-SFU travelers.

If the preference is for the guest to book their own travel, you can inform Direct Travel and the traveler can contact a dedicated SFU representative to book their trip.

If you are booking travel on behalf of an SFU employee, you can go to the travel tab for the travel arranger view:
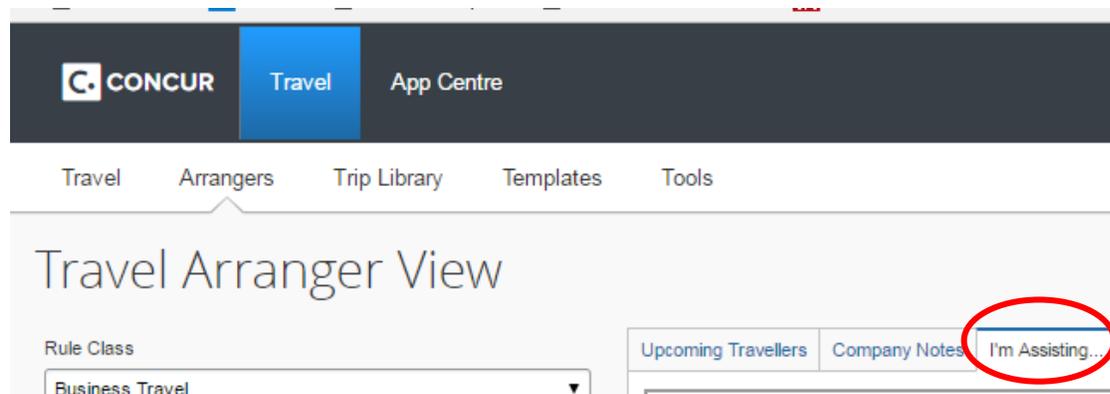
The "I'm Assisting" sections lists all the people who you can book travel for.

When booking travel for multiple people, you have the option to clone a trip to replicate the travel details for each person. You can also select "share trip" to send travel details to another Concur user.
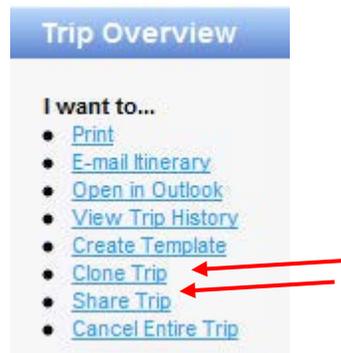
If you will be booking personal travel for guests, please contact the program administrator for one-time guest booking privileges.

6.0   BOOKING GROUP TRAVEL

Rates are slightly higher due to flexibility. To book group travel, please contact one of our Direct Travel advisors. A group rate comes into effect when you are booking for ten people or more. Group bookings are not available for personal travel, you will need to add travel for each person individually.

7.0   BOOKING A HOTEL

If you are booking a hotel separately from a flight, you can select your dates and search based on distance from your destination:

You can check off the box next to "With names containing" to search for a specific hotel.

You will then see the available hotels:

Once you make a selection, you will be taken to the reservation page where you can review the details and reserve the hotel. Click the "Back" button to make any needed changes.

Review and Reserve Hotel

Trip Summary

Hotel Selected
Nights: 7
Edmonton Intl Arpt, Edmonton, AB
Check-in: Wed, 06/07/2017
Check-out: Wed, 06/14/2017

Finalise Trip

REVIEW HOTEL ROOM
Renaissance Edmonton Airport Hotel
Canadian Government - Canadian Government, Government Issued Id Required, See Rate Rules, Guest Room, 1 King Or 2 Queen
7 Nights | 1 Guest*

Check-in	Check-out	Address	Phone
Wednesday, June 07, 2017	Wednesday, June 14, 2017	4236 36th Street Edmonton, Alberta T9E 0V4 Canada	780-488-7159

* We reserve every hotel room for 1 guest only, regardless of the number of actual travellers sharing the room. The primary traveller's name is attached to the reservation for hotel check-in.

PROVIDE HOTEL ROOM PREFERENCES
Your preferences and comments will be passed to the hotel.
Comments (30 characters max)

Ex: Need early check-in (10 am)

ENTER HOTEL GUEST INFORMATION
Ensure the name below matches the ID shown on the day of check-in. ⓘ

Hotel Guest
Name: Rita Narovlyansky **Phone:** 1 778-782-4388   rnarovly@sfu.ca ▾

Hotel Programme Add a Programme
No Programme selected ▾

REVIEW PRICE SUMMARY

Description	Nightly rate	Dates	Total
Renaissance Edmonton Airport Hotel	CAD 139.00	Jun 07 - Jun 14	CAD 973.00

Total Estimated Cost: CAD 973.00*
Total Due Now: CAD 0.00**

* May not include taxes or additional fees.
** Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT
If booking travel for personal use, do NOT use your SFU-issued corporate credit card.
The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Please choose a credit card. ▾ ⓘ   Add credit card

ACCEPT RATE DETAILS AND CANCELLATION POLICY
Please review the rate details and cancellation policy provided by the hotel.

Renaissance Edmonton Airport Hotel RENAISSANCE

Please review the rate rules and restrictions before continuing.

We are unable to retrieve the rate rules, restrictions and cancellation policy from the hotel supplier. Please contact the hotel for the information.

☐ *I agree to the hotel's rate rules, restrictions and cancellation policy.

Back   **Reserve Hotel and Continue**

• TravelSmart •

8.0 BOOKING A CAR RENTAL

You can book a car rental based on an airport or other location. Select more options to specify a car type or supplier.

Please note: Enterprise pricing include insurance at a rate of $15/day. Insurance will need to be added on for other suppliers at a rate of $25/day. Your credit card will be charged at time of drop off.

Once you click search, a list of comparable pricing will be shown:

PICK UP: (YEG) ON WED, JUN 7 12:00 PM
RETURN: WED, JUN 14 12:00 PM

Show as CAD ▾

Hide matrix   Print / Email

All 116 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car	Mini Van	Intermediate SUV	Standar
Budget	23.31	20.34	22.46	25.01	25.01	39.46	49.66	44.56	36.49	43.
AVIS	26.36	26.36	26.36	27.43	27.43	40.55	61.07	48.25	43.97	48.
Alamo	31.21	31.21	32.57	33.93	33.93	45.80	--	49.71	--	--
Hertz	33.92	33.92	35.28	36.64	36.64	45.80	--	--	49.53	54.
enterprise	46.29	46.29	47.14	48.86	48.86	57.43	--	68.57	68.57	75.
National	48.00	48.00	49.71	51.43	51.43	126.29	--	68.57	68.57	68.

Sorted By: Policy - Most Compliant ▾

Displaying: 79 out of 79 results.   Previous | Page: 1 of 8 | Next | All

Budget

Compact Car - C$20.34 per day (Sabre)
Automatic transmission
Unlimited kilometres, Pick-up: Terminal: YEG
Adults: 2, Children: 2, Large bags: 1, Small bags: 2
(Corporate rate)
C$142.37 weekly rate

Total cost*
C$233.55

E-Receipt Enabled ⓘ   Location details

Budget

Intermediate Car - C$22.46 per day (Sabre)
Automatic transmission
Unlimited kilometres, Pick-up: Terminal: YEG
Adults: 4, Large bags: 1, Small bags: 2
(Corporate rate)
C$157.25 weekly rate

Total cost*
C$251.60

When you have made a selection, you will be brought to the review and reserve page:

PICK UP: (YEG) ON WED, JUN 7 12:00 PM
RETURN: WED, JUN 14 12:00 PM

Show as CAD ▾

Hide matrix   Print / Email

All 116 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car	Mini Van	Intermediate SUV	Standar
Budget	23.31	20.34	22.46	25.01	25.01	39.46	49.66	44.56	36.49	43.
AVIS	26.36	26.36	26.36	27.43	27.43	40.55	61.07	48.25	43.97	48.
Alamo	31.21	31.21	32.57	33.93	33.93	45.80	--	49.71	--	--
Hertz	33.92	33.92	35.28	36.64	36.64	45.80	--	--	49.53	54.
enterprise	46.29	46.29	47.14	48.86	48.86	57.43	--	68.57	68.57	75.
National	48.00	48.00	49.71	51.43	51.43	126.29	--	68.57	68.57	68.

Sorted By: Policy - Most Compliant ▾

Displaying: 79 out of 79 results.   Previous | Page: 1 of 8 | Next | All

Budget

Compact Car - C$20.34 per day (Sabre)
Automatic transmission
Unlimited kilometres, Pick-up: Terminal: YEG
Adults: 2, Children: 2, Large bags: 1, Small bags: 2
(Corporate rate)
C$142.37 weekly rate

Total cost*
C$233.55

E-Receipt Enabled ⓘ   Location details

Budget

Intermediate Car - C$22.46 per day (Sabre)
Automatic transmission
Unlimited kilometres, Pick-up: Terminal: YEG
Adults: 4, Large bags: 1, Small bags: 2
(Corporate rate)
C$157.25 weekly rate

Total cost*
C$251.60

• TravelSmart •

9.0 ALTERNATIVE BOOKING OPTIONS

Bookings can also be made by contacting one of our SFU dedicated travel advisors. Please note there is a $29 fee for domestic travel, $35 for transborder travel and $39 for international travel. The fee for a group booking is $25 per person.

10.0 PAYMENTS

Purchases must be made using a credit card. There is no direct billing. If you are booking a business trip, you may use your Scotiabank CCard. If you do not have a CCard, you may request one:
http://www.sfu.ca/content/dam/sfu/finance/Procurement/Procurement%20Card%20Request%20Form.pdf

A business trip can also be booked using a personal credit card and an expense claim can be submitted for reimbursement.

Personal trips can only be booked with a personal credit card.

11.0 CANCELLATIONS/TRANSFERS

A credit will be given for cancelled trips which stays on your account. It can be used toward another booking. You may also transfer your booking to another person if the airline allows name changes.

Credits will appear under the ALERTS section on the home page.

Credits for business travel are valid for a one year period from the date of ticket issuance. After 6 months, the credit will be open to the rest of the department.

Credits for personal travel are valid for a 12 month period from the ticket issue date and stay with the traveler for the entire period.

You will need to contact a Direct Travel agent to use a credit.

12.0 SETTING UP ALERTS

You can set up alerts from your Concur home screen. You have the option to access all your travel details from your cellphone or receive electronic receipts sent to your email.
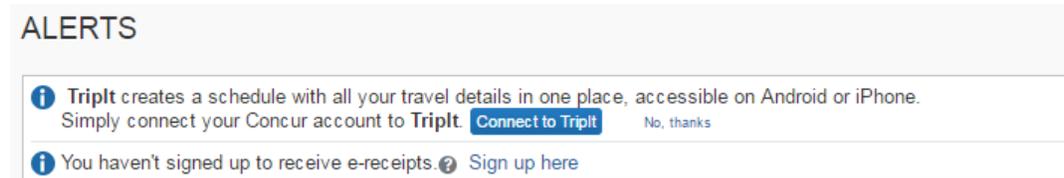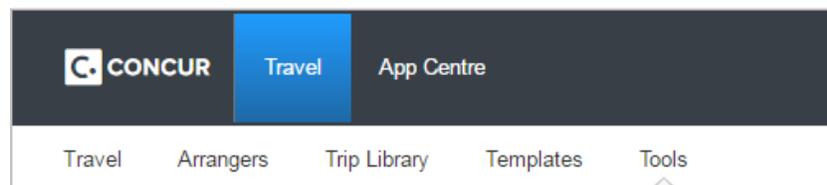

13.0 DUTY OF CARE

Duty of Care is built in but guests have the option to opt out. If a guest is booking a trip using a personal credit card, duty of care is not included.

14.0 TRAVEL TIPS

The tools section in Concur provides links to helpful information regarding your trip such as a travel reports and warnings, visa requirements, weather, currency converter, and maps.

15.0 CONTACTS

TravelSmart Program general inquiries: travelsmart@sfu.ca

Rita Narovlyansky: Administrator, TravelSmart program: 778-782-4388 ~ rita_narovlyansky@sfu.ca

Concur Support: 1-877-575-6868 ~ onlinesupportcan@dt.com

Hours: 5:00 am – 5:00 pm (PST)

SFU Dedicated Travel Advisors:

First Available PSI Advisor: 604-637-1466 or 250-410-0224 or 1-844-905-3824 (within North America) ~ PSI.Travel@dt.com

After Hours Service:

Direct Travel's 7*24 Rescue Line is available to assist travelers who are in transit and require changes in reservations due to inclement weather, labour actions, equipment breakdowns or changing business requirements. As this is an after hours service only, we encourage clients to call the agency if they are seeking information pertaining to non-immediate travel.

Within North America: Between the hours of 5:00 am and 5:00 pm Pacific Time, Mon - Fri
Call our office at 1-866-324-5764
After hours call 1-800-206-1482 and quote the following:
Membership Code: 8SHH (Eight-Sierra-Hotel-Hotel)

Outside North America: Call the phone number on your itinerary and quote the following
Membership Code: 8SHH (Eight-Sierra-Hotel-Hotel)

Vacation Services:

vacation.travel@dt.com

16.0 TRAVEL EXPENSE RECONCILIATION

Business travel that was purchased using the CCard can be reconciled in Centresuite as per the standard CCard policies:
http://www.sfu.ca/finance/departments/procurement-page/ccards.html

If you have paid for business travel using a personal credit card, a travel expense claim can be submitted:

https://www.sfu.ca/content/dam/sfu/finance/Payments/BusinessAndTravel ExpenseProceduresJune2016.pdf

• TravelSmart •

All bookings must comply with the University's [business and travel expenses policy](#)