

# TravelSmart Program

## User Guide



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## **1.0 PROGRAM OBJECTIVES**

**Simon Fraser University has partnered with Vision 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 48 hours to create 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

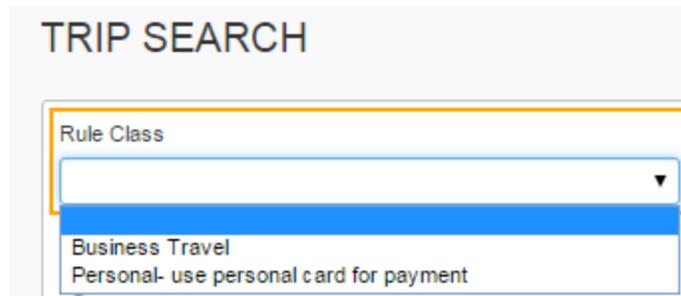
Search arranger by last name or email

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

**If you have any issues with ProFiler, please contact the TravelSmart program coordinator or email [onlinesupport@visiontravel.ca](mailto:onlinesupport@visiontravel.ca)**

## 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 image shows a screenshot of a web interface titled "TRIP SEARCH". Below the title is a dropdown menu labeled "Rule Class". The dropdown menu is open, showing two options: "Business Travel" and "Personal- use personal card for payment". The "Business Travel" option is highlighted with a blue background. The dropdown menu is enclosed in a yellow border.

**The trip search menu on the left side of the page allows you to put in your travel information to find options:**

Booking for myself | Book for a guest

Mixed Flight/Train Search

Round Trip | One Way | Multi City

From: YVR - Vancouver Intl Arpt - Vancouver, BC

To: Arrival city, airport or train station

Depart: 09:00 am ± 8

Return: 03:00 pm ± 8

Pick-up/Drop-off car at airport

Find a Hotel

Search by: Flex-faring search

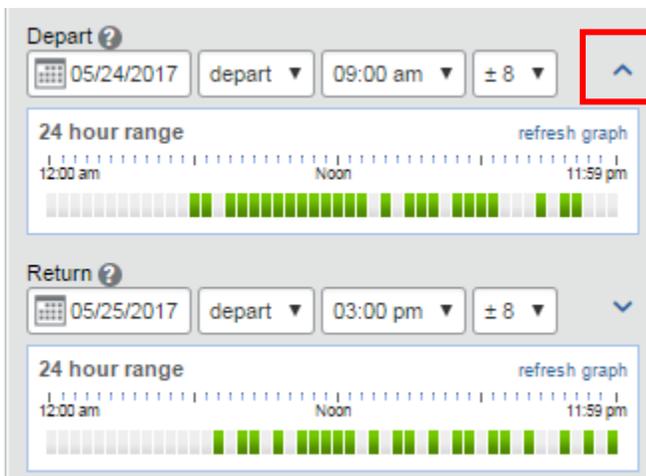
AirCanada Promotional Code: (optional)

Specify a carrier

Search

**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.

Find a Hotel

Find hotels within  miles from

Airport  Address

Company Location  Landmark / Postal Code

Landmark / Postal Code  
(e.g. 'Buckingham Palace', 'RG9 4AJ' or 'Henley-on-Thames')

With names containing:

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

**Trip Summary**

Select Flights or Trains

Round Trip  
YVR - YYC  
Depart: Wed, 05/24/2017  
Return: Wed, 05/31/2017

Finalise Trip

The airfares displayed include SFU's Corporate discount for WestJet and Air Canada shown as "(Air Canada)". Travel should select the most direct and economic option, considering the effective use of the traveler's time. Economy Class is defined as a lower cost seat on a flight selected. Business Class is permitted for flights over 8 hours, with prior approval of the President, a Vice-President, or an Associate Vice-President. First Class is not permitted. Grants that permit Business Class Travel do not require approval. See Policy link 6.0 in the Travel and Expense Procedure.

VANCOUVER, BC, CANADA TO CALGARY, AB, CANADA  
WED, MAY 24 - WED, MAY 31

Hide matrix Print / Email

|                       | WestJet    | Air Canada |
|-----------------------|------------|------------|
| All<br>54 results     |            |            |
| Nonstop<br>27 results | 9 results  | 18 results |
| 1 stop<br>27 results  | 13 results | 14 results |

Depart Return

Fares may not include all taxes and fees. You will be shown the total price paid when you click the reserve button.

Vancouver, BC, Canada - Wed, May 24

Flight Number Search  Sorted By: Price - Low to High

Displaying: 54 out of 54 results. Previous 1 2 3 4 5 6 Next | All

|                                                                           | Most Restricted   | Restricted       | Flexible         |
|---------------------------------------------------------------------------|-------------------|------------------|------------------|
| #3114 YVR → YLW<br>WestJet<br>#188 YLW → YYC<br>WestJet<br>4h 15m (Sabre) | Econo<br>CS248.47 | Flex<br>CS289.04 | Plus<br>CS419.39 |

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.**

Fare Quote

| Flt#   | From | To  | Depart              | Arrive              |
|--------|------|-----|---------------------|---------------------|
| WS 560 | YVR  | YYC | 2017-05-24 06:15:00 | 2017-05-24 08:37:00 |
| WS 545 | YYC  | YVR | 2017-05-31 07:00:00 | 2017-05-31 07:26:00 |

Number of Passengers 1

**Fare Summary**  
Base Fare 374.20

**Taxes, Fees and Charges**  
YQI - SERVICE FEE - INSURANCE 24.00  
CA1 - CANADA AIR SECURITY CHARGE - S 14.25  
SQ - AIF - CANADA EXCEPT ON/NS/QC/N 50.00  
XG - GST FOR CANADA EXCEPT ON/NS/NF 23.12

Total Est. Cost CAD 485.57

**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.

**You will then be brought the review screen.**

## Review and Reserve Flight

### REVIEW FLIGHTS

|                                                                                      |                                                                                                                    |                                                            |
|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| Outbound flight: Vancouver, BC, Canada (YVR) - Toronto, ON, Canada (YYZ) Wed, 16 Sep |                                                                                                                    |                                                            |
|     | Vancouver Intl Arpt (YVR)<br>Depart: Wednesday, 06:45 am<br>Stops: 0 Duration: Econo: P Boeing 737-800 (winglets)  | Lester B Pearson Intl (YYZ)<br>Arrive: Wednesday, 02:14 pm |
| Return flight: Toronto, ON, Canada (YYZ) - Vancouver, BC, Canada (YVR) Thu, 17 Sep   |                                                                                                                    |                                                            |
|     | Lester B Pearson Intl (YYZ)<br>Depart: Thursday, 03:00 pm<br>Stops: 0 Duration: Econo: P Boeing 737-800 (winglets) | Vancouver Intl Arpt (YVR)<br>Arrive: Thursday, 05:05 pm    |

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. @

PRIMARY TRAVELER [Edit](#) | [Review all](#)

Name: William Chris Never Phone: 604-602-3459

Frequent Flyer Programs [Add a Program](#)

For WestJet

### SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats](#)

### REVIEW PRICE SUMMARY

| Description                      | Fare       | Taxes and Fees | Charges    |
|----------------------------------|------------|----------------|------------|
| Airfare                          | CAD 642.00 | CAD 144.61     | CAD 786.61 |
| Total Estimated Cost: CAD 786.61 |            |                |            |
| Total Due Now: CAD 786.61        |            |                |            |

### SELECT A METHOD OF PAYMENT

How would you like to pay?

[Edit](#) | [Add credit card](#)

\* Indicates creditcard is a company card

**!** This is a Non-Refundable Ticket  
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.

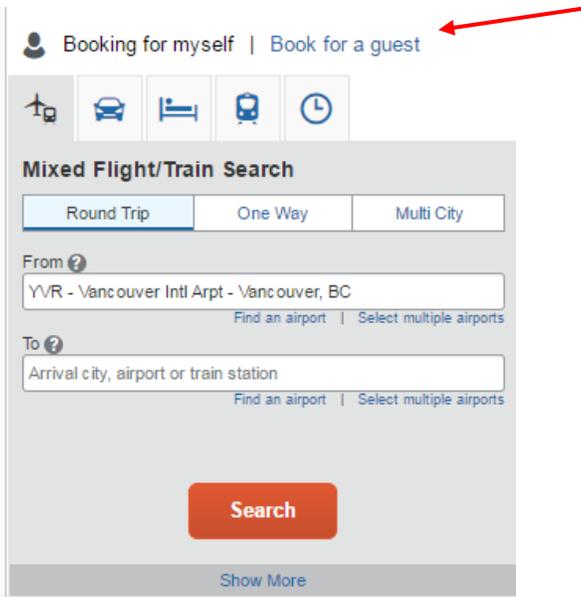
By completing this booking, you agree to the [fare rules and restrictions](#).

[Back](#) [Reserve Flight and Continue](#)

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

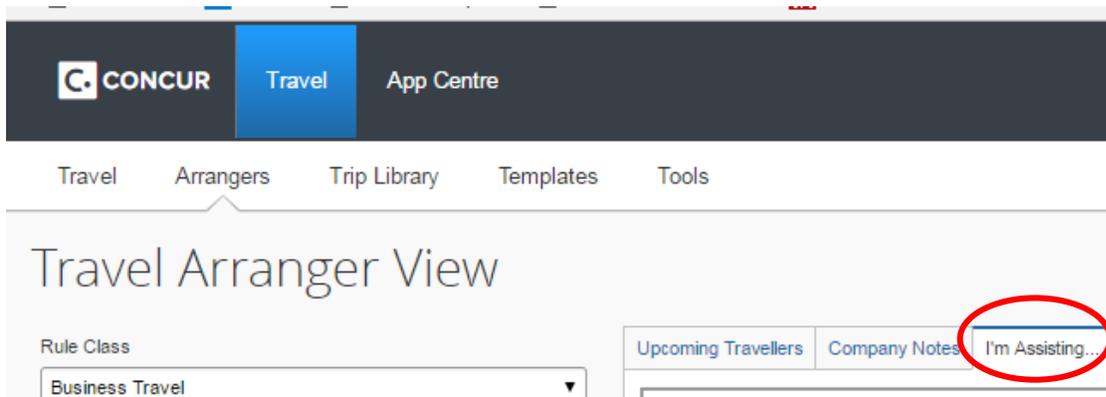
## 5.0 BOOKING A TRIP FOR OTHERS

**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.**



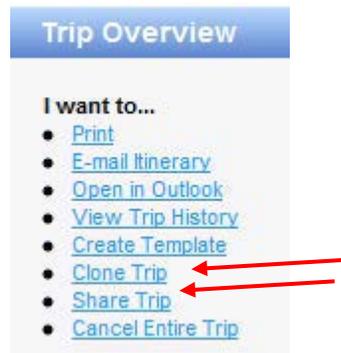
**If the preference is for the guest to book their own travel, you can inform Vision Travel and the traveler can contact a dedicated SFU representative to book their trip.**

**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 Vision 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:**

Booking for myself | [Book for a guest](#)







### Hotel Search

Check-in Date  Check-Out Date

Find hotels within  miles from

Airport  Address  
 Company Location  Landmark / Postal Code

Landmark / Postal Code  
 (e.g. 'Buckingham Palace', 'RG9 4AJ' or 'Henley-on-Thames')

With names containing:

Add Another Hotel

**Search**

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

**You will then see the available hotels:**

- |                                                                                     |                                                                                                                                              |                                      |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
|  | <b>1. Renaissance Edmonton Airport Hotel</b><br>4236 36th Street, Edmonton, Alberta T9E 0V4 <a href="#">Map it</a><br>0.27 miles ★★★★★       | C\$139<br><a href="#">View Rooms</a> |
| <a href="#">Hotel details</a>                                                       |                                                                                                                                              |                                      |
|  | <b>2. Executive Hotel Alexandra at YEG</b><br>8116 Sparrow Crescent, Leduc, Alberta T9E 8B7 <a href="#">Map it</a><br>1.68 miles ★★★★★       | C\$109<br><a href="#">View Rooms</a> |
| <a href="#">Hotel details</a>                                                       |                                                                                                                                              |                                      |
|  | <b>3. Super 8 Edmonton International Airport</b><br>8004 Sparrow Crescent, Leduc, Alberta T9E 8B7 <a href="#">Map it</a><br>1.71 miles ★★★★★ | C\$99<br><a href="#">View Rooms</a>  |
| <a href="#">Hotel details</a>                                                       |                                                                                                                                              |                                      |

**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.**

**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 and Reserve Hotel

**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<br>Edmonton, Alberta T9E 0V4<br>Canada | 780-450-7159 |

\* We reserve every hotel room for 1 guest only, regardless of the number of actual travelers sharing the room. The primary traveler'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)

**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

**Hotel Programme** [Add a Programme](#)

**REVIEW PRICE SUMMARY**

| Description                               | Nightly rate | Dates           | Total      |
|-------------------------------------------|--------------|-----------------|------------|
| Renaissance Edmonton Airport Hotel        | CAD 139.00   | Jun 07 - Jun 14 | CAD 973.00 |
| <b>Total Estimated Cost: CAD 973.00**</b> |              |                 |            |
| <b>Total Due Now: CAD 0.00**</b>          |              |                 |            |

\* 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.  
 [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**

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.**

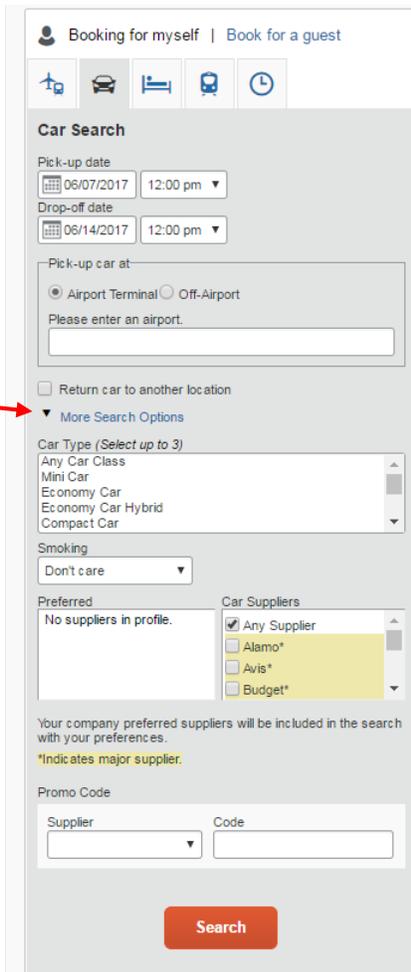
I agree to the hotel's rate rules, restrictions and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

## 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.**



The screenshot shows a web form for booking a car rental. At the top, there are links for "Booking for myself" and "Book for a guest". Below are navigation icons for flight, car, hotel, and train. The "Car Search" section includes fields for "Pick-up date" (06/07/2017, 12:00 pm) and "Drop-off date" (06/14/2017, 12:00 pm). There are radio buttons for "Airport Terminal" (selected) and "Off-Airport", with a text input field for "Please enter an airport." Below this is a checkbox for "Return car to another location" and a dropdown menu for "More Search Options" which is highlighted by a red arrow. The "Car Type" dropdown menu is open, showing options: "Any Car Class", "Mini Car", "Economy Car", "Economy Car Hybrid", and "Compact Car". The "Smoking" dropdown is set to "Don't care". The "Preferred" section shows "No suppliers in profile." The "Car Suppliers" section has a dropdown menu with "Any Supplier" selected, and other options "Alamo\*", "Avis\*", and "Budget\*" are visible. At the bottom, there is a "Promo Code" section with "Supplier" and "Code" dropdowns, and a red "Search" button.

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 |
|-------------------|-------------|-------------|------------------|--------------|---------------|-------------|------------|----------|------------------|---------|
| <b>Budget</b>     | 23.31       | 20.34       | 22.46            | 25.01        | 25.01         | 39.46       | 49.66      | 44.56    | 36.49            | 43.01   |
| <b>AVIS</b>       | 26.36       | 26.36       | 26.36            | 27.43        | 27.43         | 40.55       | 61.07      | 48.25    | 43.97            | 48.01   |
| <b>Alamo</b>      | 31.21       | 31.21       | 32.57            | 33.93        | 33.93         | 45.80       | --         | 49.71    | --               | --      |
| <b>Hertz</b>      | 33.92       | 33.92       | 35.28            | 36.64        | 36.64         | 45.80       | --         | --       | 49.53            | 54.01   |
| <b>Enterprise</b> | 46.29       | 46.29       | 47.14            | 48.86        | 48.86         | 57.43       | --         | 68.57    | 68.57            | 75.01   |
| <b>Thrifty</b>    | 48.00       | 48.00       | 49.71            | 51.43        | 51.43         | 126.29      | --         | 68.57    | 68.57            | 68.01   |

Sorted By: Policy - Most Compliant ▼

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

**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

---

**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**

E-Receipt Enabled Location details

**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 |
|-------------------|-------------|-------------|------------------|--------------|---------------|-------------|------------|----------|------------------|---------|
| <b>Budget</b>     | 23.31       | 20.34       | 22.46            | 25.01        | 25.01         | 39.46       | 49.66      | 44.56    | 36.49            | 43.01   |
| <b>AVIS</b>       | 26.36       | 26.36       | 26.36            | 27.43        | 27.43         | 40.55       | 61.07      | 48.25    | 43.97            | 48.01   |
| <b>Alamo</b>      | 31.21       | 31.21       | 32.57            | 33.93        | 33.93         | 45.80       | --         | 49.71    | --               | --      |
| <b>Hertz</b>      | 33.92       | 33.92       | 35.28            | 36.64        | 36.64         | 45.80       | --         | --       | 49.53            | 54.01   |
| <b>Enterprise</b> | 46.29       | 46.29       | 47.14            | 48.86        | 48.86         | 57.43       | --         | 68.57    | 68.57            | 75.01   |
| <b>Thrifty</b>    | 48.00       | 48.00       | 49.71            | 51.43        | 51.43         | 126.29      | --         | 68.57    | 68.57            | 68.01   |

Sorted By: Policy - Most Compliant ▼

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

**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

---

**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**

E-Receipt Enabled Location details

## **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.**

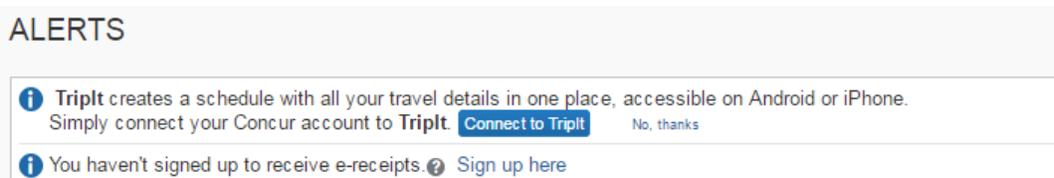
**Credits for business travel are valid for a one year period from the date of ticket issuance. After 6 months, the credit will be open to the rest of the department. After 9 months, it is open to the rest of the university.**

**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 Vision 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.**

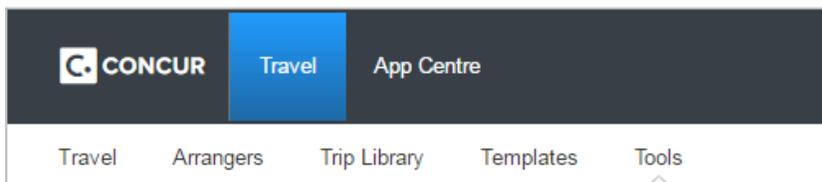


## **13.0 DUTY OF CARE**

**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](mailto:travelsmart@sfu.ca)

Rita Narovlyansky: Administrator, TravelSmart program: 778-782-4388 ~ [rita\\_narovlyansky@sfu.ca](mailto:rita_narovlyansky@sfu.ca)

Concur Support: 1-877-575-6868 ~  
[onlinesupport@visiontravel.ca](mailto:onlinesupport@visiontravel.ca)  
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@visiontravel.ca](mailto:PSI.Travel@visiontravel.ca)

### **After Hours Service:**

Vision 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:**

**Kathy Wilton:** [kathy.wilton@visiontravel.ca](mailto:kathy.wilton@visiontravel.ca) or 778-945-1270

**Lauri Walters:** [lauri.walters@visiontravel.ca](mailto:lauri.walters@visiontravel.ca) or 403-777-0728

**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/BusinessAndTravelExpenseProceduresJune2016.pdf>**

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