

# TravelSmart Program

User Guide



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## 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

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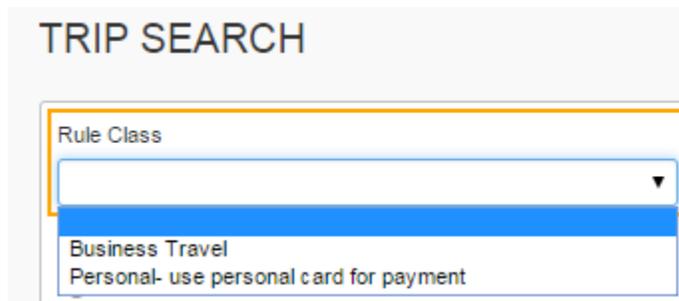
Search arranger by last name or email

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](mailto:onlinesupportcan@dt.com)

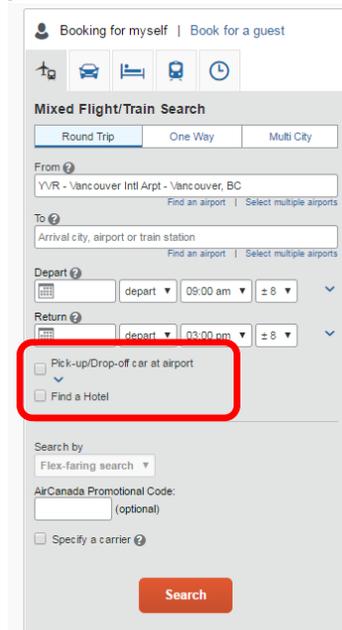
## 4.0 BOOKING A TRIP FOR YOURSELF

Once you log into Concur, you can select either business or personal to specify the type of trip.



The image shows a screenshot of the 'TRIP SEARCH' interface. A dropdown menu is open under the 'Rule Class' label. The menu contains two options: 'Business Travel' and 'Personal- use personal card for payment'. The 'Business Travel' option is highlighted in blue.

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



The image shows a screenshot of the Concur trip search form. The form is titled 'Mixed Flight/Train Search' and includes fields for 'From' (YVR - Vancouver Intl Arpt - Vancouver, BC), 'To' (Arrival city, airport or train station), 'Depart' (09:00 am), and 'Return' (03:00 pm). A red box highlights the 'Pick-up/Drop-off car at airport' and 'Find a Hotel' options. The 'Search' button is at the bottom.

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

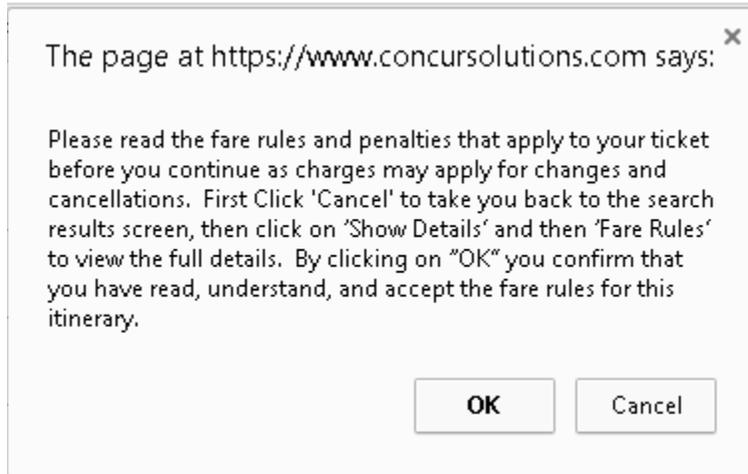
The screenshot shows a flight search interface with two sections: 'Depart' and 'Return'. The 'Depart' section is for 05/24/2017 at 09:00 am with a time range of ± 8. The 'Return' section is for 05/25/2017 at 03:00 pm with a time range of ± 8. Both sections include a '24 hour range' graph showing flight availability. A red box highlights an upward-pointing arrow in the top right corner of the 'Depart' section.

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

The screenshot shows hotel search options. It includes a checked box for 'Find a Hotel', a distance of 10 miles, and radio buttons for 'Airport', 'Address', 'Company Location', and 'Landmark / Postal Code'. A text input field contains 'Calgary, AB'. A red box highlights the 'With names containing:' checkbox and its associated text input field.

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





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

	<b>Vancouver Intl Arpt (YVR)</b> Depart: Wednesday, 06:45 am Stops: 0 Duration: Econo. P Boeing 737-800 (winglets)	<b>Lester B Pearson Intl (YYZ)</b> Arrive: Wednesday, 02:14 pm
--	--	---

Return flight: Toronto, ON, Canada (YYZ) - Vancouver, BC, Canada (YVR) Thu, 17 Sep

	<b>Lester B Pearson Intl (YYZ)</b> Depart: Thursday, 03:00 pm Stops: 0 Duration: Econo. P Boeing 737-800 (winglets)	<b>Vancouver Intl Arpt (YVR)</b> Arrive: Thursday, 05:05 pm
--	---	--

#### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. @

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

Name: William Chris Neve 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 credit card 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.

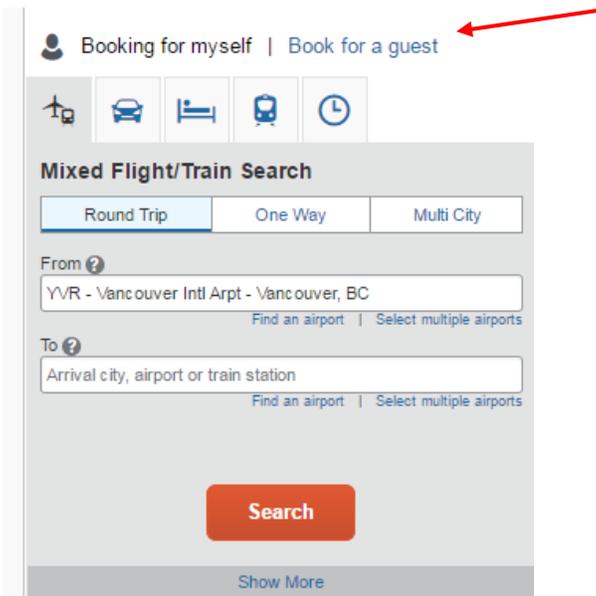
By completing this booking, you agree to the [fare rules and restrictions](#).

[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

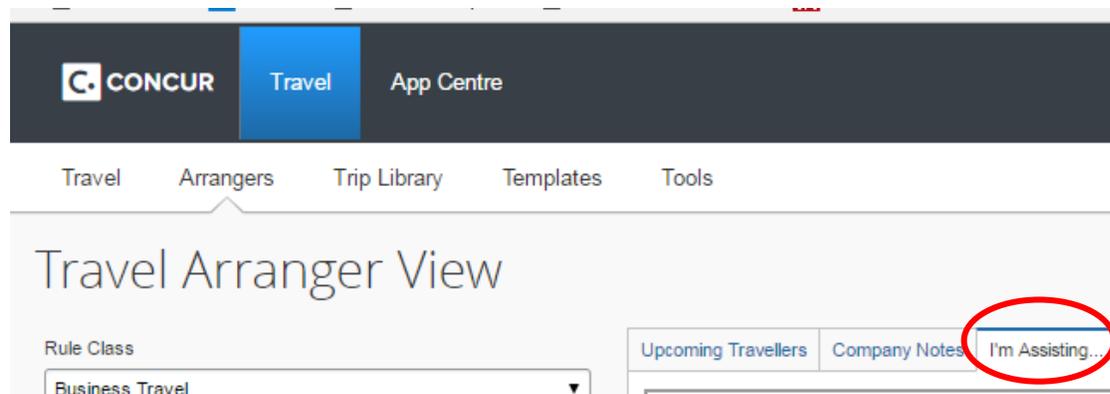
If you are booking a business related trip for a guest, you can select the “Book for a Guest” option. This can be used for non-SFU travelers.



The screenshot shows a user interface for booking a trip. At the top, there are two options: "Booking for myself" and "Book for a guest". A red arrow points to the "Book for a guest" option. Below this, there are icons for different modes of transport: a plane, a car, a train, and a clock. The main section is titled "Mixed Flight/Train Search" and contains a search form. The form has three tabs: "Round Trip", "One Way", and "Multi City". The "From" field is populated with "YVR - Vancouver Intl Arpt - Vancouver, BC" and has links for "Find an airport" and "Select multiple airports". The "To" field is empty and has the placeholder text "Arrival city, airport or train station" and links for "Find an airport" and "Select multiple airports". A red "Search" button is at the bottom of the form, and a "Show More" link is at the very bottom.

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.

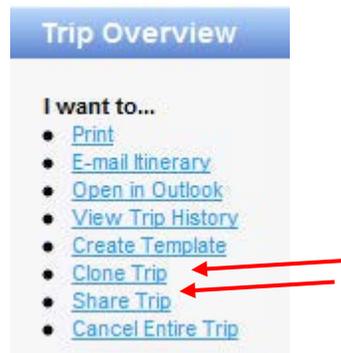
If you are booking travel on behalf of an SFU employee, you can go to the travel tab for the travel arranger view:



The screenshot shows the "Travel Arranger View" interface. At the top, there is a navigation bar with "CONCUR", "Travel", and "App Centre". Below this, there are tabs for "Travel", "Arrangers", "Trip Library", "Templates", and "Tools". The main content area is titled "Travel Arranger View". On the left, there is a "Rule Class" dropdown menu set to "Business Travel". On the right, there are three tabs: "Upcoming Travellers", "Company Notes", and "I'm Assisting...". The "I'm Assisting..." tab is circled in red.

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:

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 | <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 | <a href="#">View Rooms</a> |
| <a href="#">Hotel details</a>   |   |        |                            |
|  | <b>3. Super 8 Edmonton International Airport</b><br>8004 Sparrow Crescent, Leduc, Alberta T7G 1CA <a href="#">Map it</a><br>1.71 miles    ★★★★★ | C\$99  | <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 Int'l 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 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)

### 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.

### 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.**

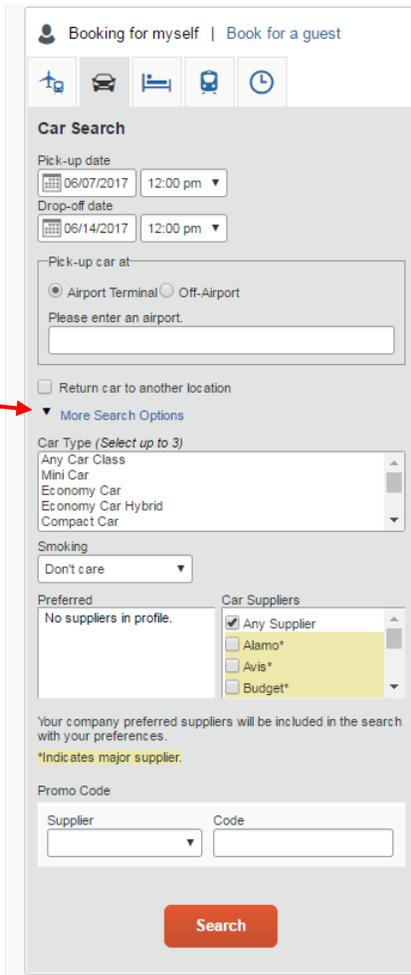
I agree to the hotel's rate rules, restrictions and cancellation policy.

Back
Reserve Hotel and Continue

## 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 car rental booking interface. At the top, there are navigation links for "Booking for myself" and "Book for a guest". Below this are icons for different travel services: a plane, a car, a train, a bus, and a clock. The main section is titled "Car Search" and contains the following fields and options:

- Pick-up date:** 06/07/2017, 12:00 pm
- Drop-off date:** 06/14/2017, 12:00 pm
- Pick-up car at:** Radio buttons for "Airport Terminal" (selected) and "Off-Airport". Below is a text input field with the placeholder "Please enter an airport."
- Return car to another location
- More Search Options:** A dropdown menu, indicated by a red arrow pointing to it.
- Car Type (Select up to 3):** A list box containing "Any Car Class", "Mini Car", "Economy Car", "Economy Car Hybrid", and "Compact Car".
- Smoking:** A dropdown menu with "Don't care" selected.
- Preferred:** A section with the text "No suppliers in profile."
- Car Suppliers:** A list box with "Any Supplier" selected, and "Alamo\*", "Avis\*", and "Budget\*" as other options.
- Promo Code:** A section with a "Supplier" dropdown menu and a "Code" text input field.

At the bottom of the form is 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	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car	Mini Van	Intermediate SUV	Standard SUV
116 results										
<b>Budget</b>	23.31	20.34	22.46	25.01	25.01	39.46	49.66	44.56	36.49	43.37
<b>AVIS</b>	26.36	26.36	26.36	27.43	27.43	40.55	61.07	48.25	43.97	48.25
<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	54.12
<b>Enterprise</b>	46.29	46.29	47.14	48.86	48.86	57.43	--	68.57	68.57	75.12
<b>Thrifty</b>	48.00	48.00	49.71	51.43	51.43	126.29	--	68.57	68.57	68.57

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**

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	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car	Mini Van	Intermediate SUV	Standard SUV
116 results										
<b>Budget</b>	23.31	20.34	22.46	25.01	25.01	39.46	49.66	44.56	36.49	43.37
<b>AVIS</b>	26.36	26.36	26.36	27.43	27.43	40.55	61.07	48.25	43.97	48.25
<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	54.12
<b>Enterprise</b>	46.29	46.29	47.14	48.86	48.86	57.43	--	68.57	68.57	75.12
<b>Thrifty</b>	48.00	48.00	49.71	51.43	51.43	126.29	--	68.57	68.57	68.57

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**

## **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%20CCard%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.

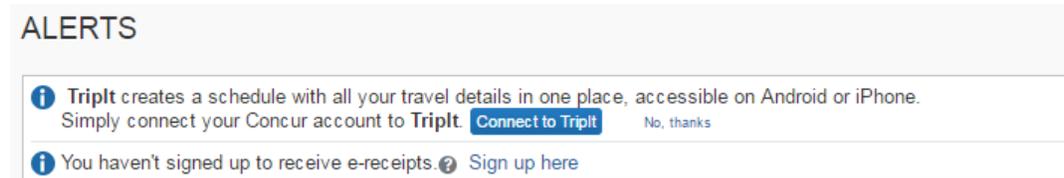
Credits for business travel are valid for a one year period from the date of ticket issuance. After 6 months, the credit will be open to the rest of the department.

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.

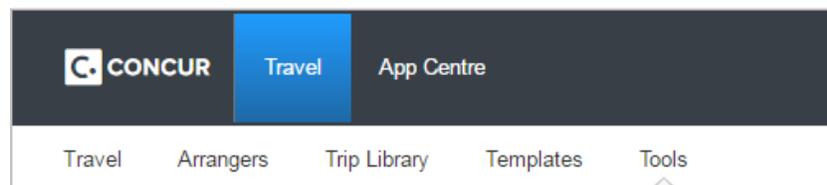


## 13.0 DUTY OF CARE

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](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 ~ [onlinesupportcan@dt.com](mailto: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](mailto: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](mailto: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/BusinessAndTravelExpenseProceduresJune2016.pdf>



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