UA Financial Services – New Travel Authorization and Booking Tool

After **May 31, 2024** *the current Travel Authorization form will be decommissioned and will no longer be accepted by the Financial Services Office.* FSO Business Travel Start to Finish guide

This new tool provides many new benefits when booking travel. <mark>At a minimum you must update your profile in the new system.</mark> You won't be able to submit Travel Authorizations if you don't take this step. The most functionality of the tool is concierge service that assists with booking flights, lodging, car rentals, etc.

How to get started:

Access the new SAP Concur tool.

Sign in with your UA email, then click "University of Arizona SSO".

Note: All UA employees automatically have a profile in the system. Students and DCC's must request a profile.

You **must** first confirm/enter your personal information. Employees can **contact Human Resources** if you need to update your name on record.

Note: The Work Address under Personal Information cannot be changed and will remain as the University Services Building (Tucson, AZ) as this is the University's business address.

To confirm your personal information, click your initials on the top right and select Profile Settings.

Under Profile Options click Personal Information.

Be sure to fill in all necessary items. You have the option to add any additional information such as personal preferences that will be saved for future travel.

Also in this section you have the option to assign delegates and arrangers to use the tool on your behalf

- Delegate - can create and submit Travel Authorization requests for you
- Arranger - can book travel for you

Your profile set up is complete.

Completing a Travel Authorization Request:

Note: The traveler's name **MUST** match their official state issued identification utilized for traveling, such as a driver's license, passport, state identification, Arizona Travel ID, etc.

On the Home page hover over **+New** at the top of the page and select Start a Request.

Fill in required information.

- Chart: (UA) University of Arizona-Management
- Org Code: 2305 (change from "text" to "code")

- Account: KFS account number. Choices are populated based on the selected Org Code (change from "text" to "code")
- Comments: include information such as upgrade charges, group travel, or a vehicle being taken out of state

Click Create Request.

Click "Add" to include expected expenses such as flight, car rental, hotel.

Click "Manage Travel Allowances" to add per diem, then click Next.

Once you're finished adding Expected Expenses, click "Submit Request".

Your Travel Authorization Request will automatically route to your Supervisor and to our Fiscal Officer, Chris Duggan for approvals.

Please contact the AME Business Office if you need assistance.

Booking Travel

Using the Booking Tool, travelers and delegates can book airfare, hotel/lodging, and car rental services directly within the travel system. Users can also obtain Anthony Travel agent-assisted support. **NOTE**: You must have a valid Travel Authorization Request number to book travel within the travel system. Your profile must be completed before using this tool.

Use a credit card when purchasing in the Booking Tool. Multiple cards including PCards can be saved in the tool.

Instructions for using the booking tool start on the next page. Please read all instructions to assist with initial Booking Tool set up. This will avoid errors or fees associated with the preferences you set up in the tool.

Tips for Using the University of Arizona Travel Booking Tool

Powered by SAP Concur

The University of Arizona has partnered with Anthony Travel to bring Campus a travel booking tool in conjuncture with the new Travel Authorization Request Application. To use the booking tool, the traveler's profile must be completed. The system will import the employee's profile, however, to book travel, there are a few pieces of information that need to be completed:

- Middle Name
- Mobile Phone Number
- TSA Secure Flight information
    - Gender
    - Date of Birth

Please note that this information is required to match the government issued ID the individual will be using to travel.
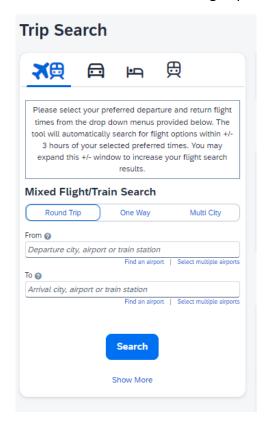
Additional information on setting up the traveler's profile can be found in the **Confirm Your Profile Information** section of the **Getting Started with the Travel Authorization Request and Booking Tool** training module.
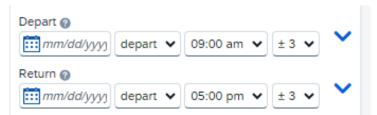
Booking Travel

The booking tool can be used to book:
- Flights
- Trains
- Reserve rental vehicles
- Reserve hotel rooms

From the home screen of the application travel can be booked using Trip Search:
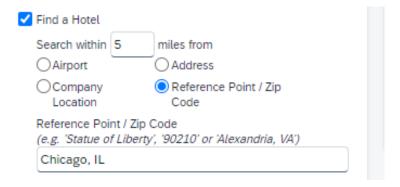

The system defaults to 3 hours before and after the preferred departure and arrival times but can be expanded by using the drop down as noted, this may be essential for international flights or remote areas to view more flight availability.

If a rental car or hotel is also required, they can be selected with the flight or added later.

Hotels can be searched by location radius from Airport, Address, Company Location, or Zip code. The radius can be expanded by entering the mile radius. The booking tool also provides real time rating for the hotel locations to review for cleanliness and safety. The tool will not allow hotel booking with a required deposit or are nonrefundable.
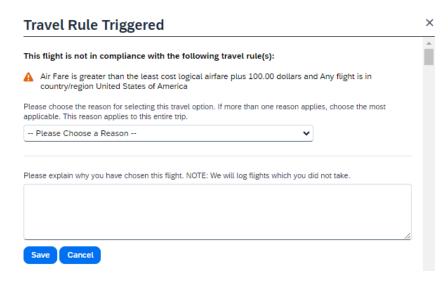
The booking tool was designed to assist users booking travel regarding UA travel policies. Orange yield icons will populate when a selection is outside the travel parameters set within the system. The traveler may select the option but will be prompted to provide additional information based on the selection. Note this is also used for reporting and future configurations.
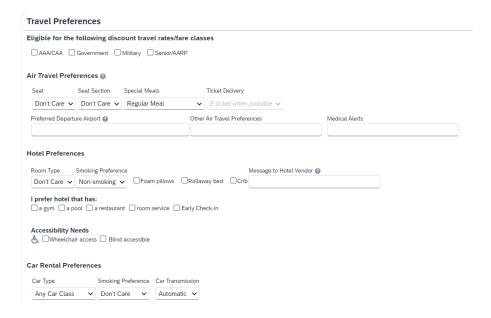
Warning Icon:

Prompt to be completed:

Additional Tips

The booking tool also utilizes the traveler's profile information while booking to include their preferences, Frequent Traveler, Driver, and Hotel guest programs as well as any Advantage Programs for travel discounts that have been added to their profile. Travelers can add preference for their flights, hotels, and car rentals. The system may require time when compiling booking options as it works to include all the traveler's information upfront while gathering available bookings across multiple vendors.

Key Items to Note

These are features that can be included in the traveler's profile for additional information for the booking tool or for a travel arranger.

- Our relationship with Anthony Travel is to serve campus and our travelers. For flights booked using the booking tool, in the case of trip disruption, flight delay, or cancelation best business practice is to reach out to a Travel Agent first. The Travel Agents can assist with rebooking flights, collecting credits, and working with the airline. Contact information for Anthony Travel, including their phone number and email address, is on the application's home page.
- Seat selection, aisle, window, middle, can be entered on a traveler's profile. In the event the traveler does not select their seat, the booking tool will choose the seat option based on these preferences.
- The traveler can also include specific dietary needs.

Air Travel Preferences ❓

Seat	Seat Section	Special Meals	Ticket Delivery
Window ⌄	Don't Care ⌄	Regular Meal ⌄	E-ticket when possible ⌄

- Frequent-Traveler Programs and Advantage Programs can be added to the traveler's profile. The system will allow to add five programs at a time. If you have more, enter the first five, save and close; then open another window to add more.
- Adding Passport information allows the system to give you passport alerts including six months prior to expiration.
- When entering a credit card into the profile, a selection must be made to indicate which types of transactions that card can be used for or the system will not be able to save that card on file.

Use this card as the default card for:
☐ Plane Tickets ☐ Car Rentals ☐ Hotel Reservations

- Multiple cards can be loaded into the booking tool and named to identify each card. If there is any personal time, locations, or preferences the traveler much use a personal card for booking.
- Comparisons can be collected by looking up the UA business travel only and use the Print/Email option at the top of the airline listing to get a list of available fare quotes.

Print / Email

- Rental cars and lodging can be added to a travel event even when the flight is previous booked.
- If there is an error in a booking, a fee can be voided if a travel agent is contacted within 24 hours of booking.
- Purchased must be selected to complete the transaction.