Travel Workshop
Introductory
Agenda

- Introduction
- What’s New in OSU Travel?
- Planning Business Travel
  - Travel Website
  - Travel Policy
  - eTravel
  - Preferred Travel Agencies
- Concur Online Booking Tool
- Corporate Travel Planners
- Questions and Answers
What is New in OSU Travel?

- Carmen Training has moved to BuckeyeLearn
- Webinar/Recorded Travel Workshop
- Updates to osutravel.osu.edu
  - “Know Before You Go”
- Basic Economy Fares
Basic Economy Fares

- Sold on Delta, American, United.
- Highly restrictive fares
  - Cannot be changed
  - No value if cancelled
  - No Assigned Seating
  - American & United: No overhead bin use

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The University does not recommend purchasing these fares due to their significant restrictions.

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Planning Business Travel

- Review “Know Before You Go”: osutravel.osu.edu/traveling/
  - Travel Policy
  - International Restrictions and Warnings
  - Traveler Quick Tips & other resources
- Get travel authorization (eTravel T#)
- Procure your travel
- Ensure the traveler knows who to call if something happens
Planning Business Travel

• Travel Website – osutravel.osu.edu
  • Most recent travel policy
  • “Know Before You Go”
  • Concur Access
  • Agency contact info
  • Rental contract info
  • Per Diem rates
  • Checklists and much more!
Planning Business Travel

- eTravel System – etravel.osu.edu
  - Captures electronic approval
  - Supports “Duty of Care”
  - “Keys to buy” when using university procurement tools
  - Audit point for all reimbursement documentation
- Required BuckeyeLearn Training:
  http://u.osu.edu/financialtraining/travel-training/
eTravel System – Travel Request Approval Email

From: travel@osu.edu <travel@osu.edu>
Sent: Tuesday, August 1, 2017 2:33:02 PM
To: Buckeye, Brutus
Subject: Travel Request Approval: R000123456

Dear Brutus Buckeye,

Travel Request R000123456 initiated by John Smith for Brutus Buckeye has been approved. The travel authorization number is T000789101. Scroll down to view general details or click the following link to view the full Travel Request in the eTravel System:

https://etravel.osu.edu/travel/travelRequest.jsf?num=123456

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Review before you travel:

- OSU Business Travel Resource Guide
- Traveler Quick Tips
- International Restrictions & Warnings

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From: osu.workflow.do.not.reply@osu.edu <osu.workflow.do.not.reply@osu.edu>
Sent: Wednesday, August 2, 2017 12:05 PM
To: Buckeye.1@osu.edu
Subject: Travel Reimbursement Certification/Approval

Dear Brutus Buckeye,

A Reimbursement Form associated with R000123456 has been initiated by Jane Smith and requires your certification/approval.

In order to be paid, you must certify and approve the Reimbursement Form: https://etravel.osu.edu/travel/paymentRequest.jsf?pnum=123456

To certify/approve the Reimbursement Form:

* Login to the eTravel system
* Review the payment page
* Certify/Approve (check the "Certification" box and click the Approve button at bottom of page)
**eTravel System - Recap**

- Travel Arrangers can create group Travel Requests using group names rather than employee names.

![Image of Travel Request Information](image-url)
eTravel System - Recap

- Select the appropriate payment method (Travel Agency/Other) when Airfare is selected.
  - Travel Agency – Prepayment
  - Other – Pcard, PO or Personal Funds
eTravel System - Recap

• When using the “Save for Later” option, be sure to provide an ORG.
eTravel System – Recap

• Be sure to follow the university’s Institutional Data Policy, and ensure restricted data elements are not attached to eTravel.
eTravel System – Recap

- To mark a Registration Prepayment Check for pickup. Change the “Payment Handling” to “PU – Name & Phone to call.” AP will call when check is ready, based in info provided in the check message field.
eTravel System – Recap

• To have conference forms sent with a registration prepayment email the completed registration form, along with the T# to apbanking@osu.edu
Break
**Uniglobe Travel Designers**

**Group Business Travel**

Agent Assist:

- (614)237-4488
- Monday – Friday 8:30 AM – 5 PM EST

**Group Travel is defined as 10+ individuals that are traveling to a common place for a common purpose, sharing a unique itinerary**
Corporate Travel Planners (CTP)

Individual Business Travel

Agent Assist:
• (855)784-9282 (Toll Free)
• theohiostate@ctp-travel.com
• Monday – Friday 8 AM – 7PM EST

Concur Booking Tool:
• 24/7 Available through osutravel.osu.edu
• Online Help Desk: (877)727-5188 (Toll Free)
Process for Airfare Prepayment – Best Practice

1. Gather Airfare Estimate (and other trip details)
2. Create/Submit Travel Request
3. Approve Travel Request (T# generated)
4. Finalize Airfare Selection with Agent or Online
5. Provide T# to complete purchase
Concur Online Booking Tool

- Individual Travel
- Supported by Corporate Travel Planners
- Business Travel Only
- Facilitates prepayment of Air and Rail only
- Facilitates reservation of Hotel and Car
- Includes all OSU contracted rates (Air & Car)
Identifying Basic Economy Fares in Concur:

![Basic Economy Fares Example](image)
Concur Online Booking Tool - Recap

- See Guides located at osutravel.osu.edu/concur-reference/
Concur Online Booking Tool - Recap

- Verify Concur Profile for accuracy and completion (Arranger and Traveler)
Concur Online Booking Tool - Recap

• Choose the credit card that matches your eTravel Business Unit

Airfare: Choose the appropriate company credit card from the drop down for your purchase.

• (1) UNIV / OSUMC* (...1329) = Your funding source business unit is for University or Medical Center funds

• (2) OSP / OSURF* (...1306) = Your funding source business unit is for Office of Sponsored Programs or Federal Grant/Research funds

**Refer to your Travel Request (T#) documentation to confirm your selection is correct before continuing with the booking process**

Hotel: There are no company credit cards available for hotel prepayment. Advance payment of hotel expenses requires an OSU Purchase Order and cannot be booked online – contact Agent Assistance at 855.784.9282 for hotel prepayment bookings. Alternately, you can add a credit card with your own payment information. Note: Hotels will require that a credit card be provided at check-in.

How would you like to pay?

Please choose a credit card  Add credit card

* Indicates credit card is a company card
Concur Online Booking Tool - Recap

- International Flights: Deselect the “Double Connections” checkbox
Concur Online Booking Tool - Recap

- Carefully read all system warning messaging.

- No agency fee will be charged for hotel reservations.
- University ID may be required at check-in when using government rates.
- Check tax exemption eligibility for hotel location. Clarify exemption (if applicable) at check-in/out.
- Verify selected room rate is within Travel Policy limits for the appropriate Domestic or Foreign lodging Per Diem rate.
- Advance payment of hotel expenses requires an OSU Purchase Order and cannot be booked online – contact Agent Assistance at 855 784 8989 for hotel prepayment bookings.
Trip Cancellation Checklist:

• Cancel airfare
• Cancel lodging to avoid fees and penalties
• Cancel rental vehicle
• Cancel Registration if applicable
• Notate eTravel and cancel the Travel Request

Contact a Corporate Travel Planners (CTP) agent for assistance with cancelling all arrangement made via Concur or a CTP Agent.
Break
Topics for Discussion

• CTP Overview
• Benefits of Managed Travel
• Contract Savings Example
• How Fares Work
• Myth Busters
## CTP Overview - Account Structure

### Domestic & International Agents

### CTP Online Help Desk

### When to Call

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Benefits of Managed Travel

**Competitive Fee Structure**
- Significantly lower booking fees / **No fees for car or hotel bookings.** Lower than airline booking fees.

**Dedicated Phone Line and Email Account**
- Dedicated email address [theohiostate@ctptravelservices.com](mailto:theohiostate@ctptravelservices.com) and dedicated phone numbers.

**Duty of Care**
- In the event of an emergency, CTP will pull a report that includes all Ohio State travelers affected by the emergency and will proactively contact them as needed.

**Discounted Hotel Rates**
- CTP offers over 70,000 negotiated hotel rates. 85% of these rates come with added amenities.

**Contract Savings**
- The Ohio State’s negotiated rates and CTP’s 70,000 discounted hotel rates are available within Concur and with our full service agents. **More spend = more leverage for even better discounts.**
Direct Connect
- Access to direct connect content (fares) - i.e. Southwest Airlines web fares. This is not available on any other website.

Unused Ticket Management
- We track, manage, and fulfill unused tickets and offer assistance to work with airlines to change non-transferrable tickets to another traveler.

Guaranteed Competitive Fares
- We search for and offer the lowest airline fares available in the market.
There are over 100 different fares from Columbus to Chicago.

Each fare has its own specific rules.

- Advance Purchase
- Day of the Week
- Time of Day

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• Travel agencies don’t have the same information that is available on the internet.
• No one uses travel agents any more.
• There is no benefit in using a travel agency.
Questions & Feedback

Email: travel@osu.edu