World Travel
Booking Federally-Funded Air Travel
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Section I

Why Use World Travel?
What is World Travel/Concur?

• World Travel is the Yale-preferred service for booking travel funded by federal grants. Concur, a best-in-class travel platform, powers it.

• Travelers can view and book flights, hotels, car rentals, limo service, and rail travel.

• All current Yale-associated travel discounts with preferred suppliers will apply.
## Benefits of booking with World Travel/Concur

<table>
<thead>
<tr>
<th>Feature</th>
<th>World Travel/Concur</th>
<th>Other Online Booking Services/Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicates compliant flights</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Indicates when an exception is required and allows documentation within the system</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>You must manually compare flights to find one that meets requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compiles and stores comparison flight information</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>You must attach screenshots of three comparable flights that were not chosen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supports compliance with government requirements to avoid non-compliance penalties for Yale</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Yale pays costly penalties when non-compliant flights are applied to grants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helps Yale maximize use of grant funding</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Travel bookers who don’t follow all compliance processes may find that their flights are not allowable to grants</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section 2

Login and Homepage

Yale Learn and Grow
Access [concur.yale.edu](https://concur.yale.edu)

- You will be directed to the Yale CAS screen where you will need to log in with your Yale NetID / password.
- You may also be prompted and need to accept the DUO authentication request.
- From there you will be directed to World Travel for making your travel arrangements.
Homepage

Trip Search Interface

Upcoming trips will appear here

Profile Access

Click Read More for helpful links
Section 3

Profile Set-up
Accessing profile options

Click on your profile and access Profile Settings to see Profile options. To start, choose Personal Information.
Enter profile information

Profile fields cover:

• Your Information - Review and update your personal information, contact information, and emergency contacts. Verify your email addresses and add or update credit cards that are available to use for purchases. Be sure to fill all required fields.

• Your Preferences - Add your travel preferences and frequent-traveler program information. Add assistants or arrangers that can book travel for you.

• Other Settings - Activate e-receipts, configure system settings, change your password, and register your mobile devices.

Access a video and tip sheet for setting up your profile
Section 4

Booking Federally Funded Travel
Identifying your trip as federally funded

- The World Travel/Concur platform is configured to comply with government requirements.

- Travel can only be booked in the platform after the funding source has been identified on the trip search screen.

- Options are:
  - Federal Funds
  - DOD Awards
  - Non-Federal Sponsored or Non-Sponsored Funds
Searching for air travel options

In this example, the search is for flights between JFK and Paris.

Tip: Be as specific as you can related to the desired departure time. The hour window is helpful if you are unsure about typical flight times.

The funding source is Federal Funds

Searching round trip flights

Departure and Arrival points

Travel dates and times

Search by Price or Schedule, and choose “Include additional refundable fares” to see comparisons.
Viewing flight options

When you search, a pop-up will appear. It provides important information and links to learn more about the Fly America Act and Open Skies. It provides a phone number to meet an agent if you’d like to call.

Click OK to see flight options.

Search details display on the left side of the screen.

Flight options will appear in the matrix near the top of the screen.
If preferred, the user can hide the matrix via the “Hide Matrix” option above the grid.
Choosing a US air carrier

When you choose a US airline for a flight, it is automatically compliant with the Fly America Act.

When we view the Delta option, the shield icon above the price indicates it’s automatically Fly America Act compliant. View Fares to see options.

The green check icon indicates that the flight conforms to travel rules and does not require an exception. This flight can be chosen and booked with no further explanation.
Choosing an EU air carrier with an Open Skies agreement

- Open Skies agreements are in place between the U.S. government and the EU countries shown here.
- These agreements allow travelers to use foreign air carriers for government-funded international travel.
- On the next slide, see an example of choosing a French carrier.

<table>
<thead>
<tr>
<th>Austria</th>
<th>Belgium</th>
<th>Bulgaria</th>
<th>Cyprus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>Denmark</td>
<td>Estonia</td>
<td>Finland</td>
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<tr>
<td><strong>France</strong></td>
<td>Germany</td>
<td>Greece</td>
<td>Hungary</td>
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<td>Poland</td>
<td>Portugal</td>
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<tr>
<td>Slovakia</td>
<td>Slovenia</td>
<td>Spain</td>
<td>Sweden</td>
</tr>
</tbody>
</table>
Choosing an EU air carrier with an Open Skies agreement (cont. 2)

When you choose an EU carrier with an Open Skies Agreement, you must choose a reason.

When we view the Air France option, the shield icon above the price indicates it’s Fly America Act compliant, but the orange exclamation point indicates that the flight requires an exception reason.

View Fares to see options.

Clicking the orange exclamation point will explain that you must provide a reason for choosing this flight.

Click on a price to view and choose a reason option.
Choosing an EU air carrier with an Open Skies agreement (cont. 3)

When you choose an EU carrier with an Open Skies Agreement, you must choose a reason.

When the “Travel Rule Triggered” pop-up appears, choose a reason from the drop-down.

In this case, the first option is correct.

When a reason is chosen, there will be a space below to add text if desired.

When scrolled, the window displays all the options that were not chosen. The system will keep that information if the flight is booked, eliminating the need for screenshots for expense reports.

Once the reason is saved, the flight can be reserved/booked.
Choosing an air carrier without an Open Skies agreement

When you choose a carrier without an Open Skies agreement, you must indicate why to remain in compliance with the Fly America Act.

Because the UK does not have an Open Skies agreement with the US, there is no shield icon indicating compliance with FAA. The orange exclamation point indicates that the flight requires an exception reason. The exception choices will be different from the options under an Open Skies agreement.

Clicking the orange exclamation point will explain that you must provide a reason for choosing this flight.

Click on a price to view and choose a reason option.
Choosing an air carrier without an Open Skies agreement

When you choose a non-US carrier without an Open Skies agreement, you must indicate why to remain in compliance with the Fly America Act.

When the “Travel Rule Triggered” pop-up appears, choose a reason from the drop-down.

When a reason is chosen, there will be a space below to add text if desired.

When scrolled, the window displays all the options that were not chosen. The system will keep that information if the flight is booked, eliminating the need for screenshots for expense reports.

Once the reason is saved, the flight can be reserved/booked.
Choosing carriers for flights between the US and Switzerland, Australia, or Japan

- Federal government employees are eligible for discounted fares when a City Pair contract exists on the government website, City Pair Program (CPP) | GSA

- **Yale travelers are not eligible** to take the discounted City Pair fares.

- However, **Yale travel bookers must conduct a City Pair search** at the link above when traveling between any point in the US to a non-EU open sky member state (Australia, Switzerland, or Japan.)
  - This is because the city pair requirement is a part of the Open Skies agreement with these countries.
  - No City Pair search is required when traveling Internationally between two points outside the U.S.

- If a City Pair contract is in place, a US carrier must be selected.

- If no City Pair contract is in place, travelers may only choose Australian, Swiss, or Japanese air carriers for travel to or from the US.

- When booking flights, you will be required to attest that you searched for City Pair fares.
Choosing an air carrier that requires a City Pair, when a City Pair is not available

For this example, the search is for a flight to Sydney. A pop-up will appear once the flights are searched.
Choosing an air carrier that requires a City Pair when a City Pair fare is not available

An Open Skies exception to the FAA must be chosen when a City Pair is unavailable and you have not chosen a U.S. carrier.

The orange exclamation point indicates that the flight requires an exception reason.

Clicking the orange exclamation point will explain that you must provide a reason for choosing this flight.

Click on a price to view and choose a reason option.
Choosing an air carrier that requires a City Pair, when a City Pair is not available (cont.)

When the “Travel Rule Triggered” pop-up appears, choose a reason from the drop-down.

When a reason is chosen, there will be a space below to add text if desired.

When scrolled, the window displays all the options that were not chosen. The system will keep that information if the flight is booked, eliminating the need for screenshots for expense reports.

Once the reason is saved, the flight can be reserved/booked.
Section 5

Reserving and Purchasing a Flight
Reserving a flight

• Once you choose a flight, a “Review and Reserve Flight” screen will appear.

• Review all information before reserving your flight.

• This is an easy process if you have completed your profile, as most information will automatically populate.

• You can select your seats from this screen.
Reviewing and Finalizing

- Once you reserve a flight, review all the Travel Details, including:
  - The Trip Overview
  - Flight Reservations
  - Total Estimated Cost

Click Next to advance process, or Cancel Trip to go back
Enter Trip Booking Information

• The platform allows the booker to enter information for the booker’s own records.
• The Funding Source and Trip Purpose fields are required.
• Click “Next” to continue.
Submit the Trip Confirmation

• The Travel Details appear again for a final review.

• Recheck all information before clicking “Purchase Ticket”.
The system provides a Trip Record Locator number to easily access trip details and flight information.

You can print or email your itinerary from this screen.
Section 6

Booking Hotel and Car Reservations
Booking Hotel and Car

Access videos and tip sheets for booking hotel and car reservations

1. To book a hotel, from the SAP Concur home page, select the Hotel tab.

2. Enter your search criteria, such as check-in and check-out dates, location, and other search options, and then select Search.