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LOGGING IN TO CONCUR
Travelers and approvers will access the Concur Travel System at https://www.concursolutions.com/.

Your access will be limited to the test site https://implementation.concursolutions.com until your agency decides to go live. A password will be assigned once training has been completed. This can be done by attending a live training session or by viewing all required interactive training videos on the Comptroller website.

The User Name is your state email address. A password will be provided and activated once required training has been completed. Contact your travel administrator to find out about available training.

CHANGING YOUR PASSWORD
To change your password, click Profile in the top right of the page then select Profile Settings.
Select **Change Password** and follow the instructions given. Be sure to format your new password based on the guidelines provided.
UPDATING PERSONAL INFORMATION

To update your personal information, click **Profile** in the top right of the page then select **Profile Settings**. Select **Personal Information** from the menu bar. Prior to using the Concur Travel application to book your travel, you must review and update your personal information in order to prevent errors when booking.

NAME

Verify that your name matches exactly to the photo identification that will be presented at the airport. If changes need to be made, contact your personnel department to get your GHRS file updated.

WORK AND HOME ADDRESS

Verify that your work and home addresses are correct. *This information will be used for mileage calculations in the Expense module.*

CONTACT INFORMATION

Either a work or home phone number is required, along with a mobile phone number. These will only be used in an emergency situation if the travel management company needs to contact you about your booking or travel details.
**EMAIL ADDRESS**

Be sure your state issued email address is listed under this section. You may add two additional email addresses that the travel management company will automatically send all travel related notifications to. Three notifications are sent with each booking: itinerary, invoice notification, ticketing notification.

Once you have saved your email address, select the Verify link. A message from Concur will be sent to your email with a verification code. Enter this code into the Enter Code field next to the email address. Select OK to submit. *When this verification is done, Concur can associate information forwarded from that email address to your account. You will be able to email receipts to receipts@concur.com and they will be uploaded into your Available Receipts section. An email address can only be associated with one Concur profile.*

**EMERGENCY CONTACTS**

Complete this section as necessary.

**TRAVEL PREFERENCES**

In this section you can enter:

- Discount travel rates/fare classes
- Air, Hotel and Car Rental preferences
- Add Frequent Traveler Programs

To add a Frequent Traveler Program, select Add a Program. If a program is entered incorrectly, it could result in an error in the reservation system. Use the Search this Vendor check box to prioritize the search in the Travel application. Keep in mind that the State’s travel policy will usually override your individual vendor preferences.
**UNUSED TICKETS**

The **Unused Tickets** section will populate if a trip is canceled after ticketing and the airline ticket goes unused. Concur will not auto-reuse your unused ticket credits listed in your profile. During regular business hours the travel agent team will be alerted if the traveler has an unused ticket and if possible, use the credit towards your upcoming travel.

![Unused Tickets Table]

**TSA SECURE FLIGHT**

In the TSA Secure Flight section, verify the required **Gender** and **Date of Birth** fields. Complete the **DHS Redress No** and the **TSA Precheck Known Traveler Number** fields, as needed.

**INTERNATIONAL TRAVEL: PASSPORTS AND VISAS**

Passports and Visas can be added to your profile and the information will be included with your travel booking.

**ASSISTANTS AND TRAVEL ARRANGERS**

You can assign an assistant/arranger to view and modify your profile and book travel on your behalf. Each traveler can have one primary assistant.
In the **Credit Cards** section, add or update your state issued travel card information. **You must have a credit card saved here in order to book travel through Concur.** You may only add a state issued travel card in Concur. Personal credit cards will not be accepted.

To add a credit card, select **Add a Credit Card**. It is recommended that you set the credit card as the default for air, car and hotel travel. If this is done, Concur will not prompt you to choose a credit card each time you are booking travel. The Billing Address will be the address the agency had the state travel cards delivered to. Please contact your pcard administrator if you need assistance with this address.

Be sure to **Save** all changes made to your personal information before proceeding.
OTHER PROFILE INFORMATION
Under Profile Settings, there are other areas to view and update information.

REQUEST SETTINGS

- Request Information
  This section should default with your agency and accounting template information. If this information looks incorrect, please contact your travel admin.

- Request Preferences
  This section allows you to select email notification options for your travel request.

EXPENSE SETTINGS

- Expense Information
  This section should default with your agency and accounting template information. If this information looks incorrect, please contact your travel admin.

- Expense Preferences
  This section allows you to select email notification options for your expense report.

E-RECEIPT ACTIVATION

E-Receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

CONCUR MOBILE REGISTRATION

From this section, you can send a link to your email address in order to download the Concur app. The login for the app will be your state email address and the password that has been provided. Once a password has been provided, you will be able to create a Mobile PIN if you prefer that method of logging in.
EXPLORING THE HOME PAGE

**Menu Bar**

The menu bar contains the Request, Travel, Expense and Approvals (for approvers only) modules. If at any time you need to return to the Home page, click the SAP Concur logo in the top left corner.

**Trip Search**

This section provides the tools you need to book travel. You will be able to book a flight, hotel and rental car.

**Alerts**

This section displays informational alerts about Travel features.

**Company Notes**

The Comptroller’s Office will update this section with important notes/tools related to travel.

**My Trips**

This section lists your upcoming trips that have been booked with the Travel module.
My Tasks

This section lists Required Approvals, Open Requests, Available Expenses and Open Reports.

- Required Approvals – this section will only be utilized by individuals who are designated as an approver in the agency workflow.
- Open Requests – this section will list any open or unsubmitted requests.
- Available Expenses – any State Travel Card transactions will import into Concur from the bank and will be visible in this section.
- Open Reports – this section will list any open expense reports that the traveler has not submitted.
CREATING A REQUEST

1. Select the Request tab on the menu bar.

2. Select New Request.

3. Complete the required fields on the Request Header.
   - **Request Policy** – The Request Policy will default to Out of State. Make the necessary change if the travel is for In State Actual.
   - **Request Name** – The Report Name should be formatted as “Destination, Travel Dates”. As an example, “Atlanta, GA – 10/1-10/3/18”.
   - **Start Date** – Enter the trip start date.
   - **End Date** – Enter the trip end date.
   - **Will this include dates of Personal Travel?** – Select yes or no. If yes is selected, you will be required to enter dates in the Dates of Personal Travel field.
   - **Dates of Personal Travel** – Enter dates only if personal travel is combined with the business travel event.
   - **Department** – This information should default based on the user.
   - **Accounting Group** - This information should default based on the user. *This information is for workflow purposes only.*
   - **Accounting Template** - This information should default based on the user. *This information is for workflow purposes only.*
   - **Purpose** – Enter the reason for the travel event.
   - **Comment** – Use this field for any additional information that your approver will need to approve the request. Examples: 100% funded by organization, using motor pool, etc.

4. Select Save in the top right-hand corner of the screen.
5. You will be directed to the **Segments** tab.

In this section, you can enter the travel itinerary and estimated cost information related to your trip for air, hotel, rental car and rail. Be sure to take into consideration that ticket prices may increase if the request is held up for any reason.

a. Select the airfare icon.

- **Select Round Trip, One Way or Multi-Segment.**
- **Amount** - Enter the estimated cost of your airfare in the Amount field. This field is only for the ticket cost and applicable taxes and fees. Baggage will be estimated in another area of the request.
- **From** – Enter the departure airport.
- **To** – Enter the destination airport.
- **Outbound Date** – Enter the date you are departing and the estimated time of departure.
- **Return Date** – Enter the date of your return flight and the estimated time of departure.
- **Save**
b. Select the hotel icon.

- **Amount** – Enter the estimated cost of your hotel stay. This cost should include all fees, taxes, parking, etc.
- **City** – Enter the city the hotel is located.
- **Check-In Date** – Enter the date of check-in.
- **Detail** – Enter the name of the hotel you wish to book.
- **Check-Out Date** – Enter the date of check-out.
- **Save**

c. Select rental car icon.

- **Amount** – Enter the estimated cost of the rental car.
- **Pick Up City** – Enter the city where you will pick up the car.
- **Date** – Enter the date you will pick up the car.
- **Drop Off City** – Enter the city where you will drop off the car.
• **Date** – Enter the date you will drop off the car.
• **Save**

6. Select the **Expenses** tab to enter estimates of other travel expenses related to your trip.

Some of the most commonly used expenses are as follows:

- Baggage Fees
- Airport Parking
- Transit Costs
- Conference Registration
- Mileage – Enter the estimated mileage and the system will calculate the allowable mileage reimbursement amount for the trip.

- M&IE Rate – Select the start and end date of business, along with the city you are traveling to, and the system will calculate the allowable total M&IE (Meals and Incidental Expenses) for the trip.

Be sure to **Save** after each expense type is completed.
7. Select **Attachments** and **Attach Documents** to upload your travel packet and any information necessary for the approval of your travel request.

![Attachment Options](image1)

If the attachment needs to be edited, select **Check Documents**. (Be sure pop-up blocker is turned off.) The dropdown menu will change. Select **View Documents in a new window**.

![Attachment Options](image2)

8. After you have entered all information and verified it is accurate, **Submit Request**. Once you submit a request, you can only recall the request if your approver has not started the approval process.

9. Select the **Approval Flow** tab to see the routing of your travel request.

![Approval Flow](image3)

10. Once your request has been approved, the 4 digit Request ID will be necessary to proceed with booking your travel in Concur.

![Request Details](image4)
BOOKING A FLIGHT

From Concur home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations without a flight, use the Hotel and Car Search tabs, respectively.

You can access the Flight tab by doing one of the following:

On the Concur home page, on the menu bar, click Travel.
On the Concur home page, on the menu bar, click the SAP Concur logo at the top left of the screen. The Flight tab is on the left side of the page.

STEP 1: START THE SEARCH

1. Select one of the following types of flight options:
   - Round Trip
   - One Way
   - Multi City

2. In the From (Departure City) and To (Arrival City) fields, enter the cities for your travel. When you enter a city, airport name, or airport code, Concur will automatically search for a match. **Note:** Use the Find an airport and Select multiple airports links as needed.

3. Click in the Departure and Return date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the appropriate time range.
4. Click the ▼ arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, if necessary, to see/reserve nonstop flights.

Notes:
- Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all the flights available for that time slot.
- If you change locations or dates, click refresh graph for more data.

5. If you need a car, click the Pick-up / Drop-off car at airport check box.

- If you need an off-airport car or have other special requests, you can skip this step and add a car later from your itinerary.

6. If you need a hotel, click the Find a Hotel check box.

Additional fields appear.
- Choose to search near an Airport, Address, Company Location, or Reference Point / Zip Code, and then enter the appropriate information in the available fields.
- If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel later from your itinerary.

Note: Before booking, canceling, or changing your hotel reservation, verify the hotel’s cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.

7. You may also specify which airline you would like to search for if you have a preference by selecting the Specify a carrier check box.

Note: You can only search one vendor at a time, and this will override the preferred airline searches normally done for all the frequent flyer number carriers.

If you click the Specify a carrier check box, a list of carriers appears that are color coded:
- The first (yellow) will be their frequent flyer carriers.
- The second (gray/khaki) are the most requested airlines.
- The remaining airlines are in alphabetical order.

8. You are also able to select the appropriate class of service.

9. Click Search.

The flight search results appear.
STEP 2: SELECT A FLIGHT

On the Flight Search results page:

1. You have the option to Shop by Fares or Shop by Schedule to review available flights.

2. On the Shop by Fares tab, to view additional details for the flights, click the Show all details dropdown arrow.

3. To select a flight, click the fare button.

Note that a yellow caution sign next to the Fare button will indicate if the selection is out of policy compliance. If this is the case, you will be prompted to select a reason and this information will be sent to your supervisor, along with the results of your search.

4. On the Review and Reserve Flight page, you can do the following:
   - Review your flight details
   - Enter your traveler information
   - Select your frequent flyer programs
   - Select your seat assignment
   - Review the price summary
   - Select your method of payment

   Note: Depending on your airfare provider, you may be able to click the Select a seat link to select your seat on the flight. Select the appropriate Available seat from the Seat Map.
the airfare provider does not allow seat selection at this time, you will be able to make your selection further along in the process.

5. Click Reserve Flight and Continue.

**STEP 3: SELECT A RENTAL CAR**

If you requested a car on the Flight tab Search, the rental car search results appear. For information about booking a rental car, see **Booking a Car** in this document.

**STEP 4: SELECT A HOTEL**

If you requested a hotel on the Flight tab Search, the hotel search results appear. For information about booking a hotel, see **Booking a Hotel** in this document.

**STEP 5: REVIEW THE TRAVEL DETAILS PAGE (ITINERARY)**

1. On the Travel Details page, review and change your itinerary, if necessary.
2. In the Trip Overview section:
   a. Review the information for accuracy.
   b. In the I want to section, print or email your itinerary as appropriate.
c. In the **Add to your Itinerary** section, add a car, hotel, as needed.

![Travel Details](image)

3. In the **Flight** section:
   
a. Verify the information for accuracy.
   
b. Click **Select Seat** or **Change Seat** to select or change your seat option (depending on the airline).
   
c. Your company might allow you to change or cancel your flight from the itinerary page. If so, click **Change** or **Cancel**, and then follow the prompts to change your outbound or return flight.
   
   Travelers given the option to change a flight will be able to select a different date or time for the trip but must stay on the same airline.
   
   **Note:** Changing a flight can result in fare changes.
   
d. Click **Cancel all Air**, as needed.

![Reservations](image)

4. Review the remaining sections and make the appropriate changes.

5. Review the **Total Estimated Cost** section.
6. Click Next.
7. The Trip Booking Information page appears.

**STEP 6: REVIEW THE BOOKING INFORMATION**

Use the Trip Booking Information page to enter additional information about your trip.

1. Enter or modify your **Trip Name**.
   This is how the trip will appear on your itinerary and in the automated email from Concur. This will also appear under “My Trips” on your home page.
2. Enter a **Trip Description** (optional).
3. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.
   If you book the trip, you will automatically receive the email. If you book the trip as an arranger, you will also receive the email.
4. Choose your preferred email format, either plain text or HTML.
5. You will also be able to choose whether you would like to receive directions or maps to the hotel.
   This information will be part of the initial email from Concur.
6. The approved travel request ID must be entered in the required field. You will not be able to proceed with booking if you do not have this information.
7. Click **Next**.
   **Note:** Your company might offer its travelers the option to hold a trip. Travel will always display the length of time this trip can be held on this page. **Pay close attention to the date and time displayed; if the trip is not submitted, approved, and ticketed by the date and time displayed, in most cases it will be automatically cancelled.**
Concur displays your itinerary on the Trip Confirmation page. This itinerary will include any messages about ticketing policies.

**STEP 7: PURCHASE THE TICKET**

1. Click **Purchase Ticket** to send your request to the travel management company. At this time, your agency will be charged a $5 booking fee by the travel management company. Cancellations may be allowed within the same day without a charge to the travel card, but the booking fee is nonrefundable.
   
The Finished! screen shows your confirmation number and information to contact the travel agent.

2. Click **Return to Travel Center**.
BOOKING A CAR

STEP 1: SEARCH FOR YOUR CAR

If you require a car but not airfare, from the Concur home page, request the car using the Car tab instead of the Flight tab.

1. Enter your pick-up and drop-off dates and times.
2. In the Pick-up car at section, select either:
   - Airport Terminal, and then type the city or the Airport code.
   - Off-Airport, and then enter (or search for) the location.
3. Select the Return car to another location check box, as needed.
   If you want to return the car to another location, additional fields will appear. Select either Airport Terminal or Off-Airport, and then enter the appropriate location.
4. To see additional search preferences, click More Search Options.
5. Select the Car Type.
   Tip: Hold the Ctrl key to select more than one type.
6. Select all your preferences, and then click Search.
   The rental car search results appear.

STEP 2: FILTER THE RESULTS

There are two sets of filters: The matrix at the top of the page, and the Change Car Search area on the left side of the page.

To filter your results using the Change Car Search area

1. On the left side of the page, use the show \( \vee \) and hide \( \wedge \) arrows.
2. Select the Use my default credit card check box, if needed.
   This is the credit card that you set up as your default in your profile.
3. In the Change Car Search area:
   - Change your pick-up and drop-off dates and times, and your pick-up and drop-off locations.
   - Click More Search Options to select additional options such as a car type, and vendors.
4. Click Search.
   The new search results display.

To filter your results using the Matrix at the top of the page

1. Use the grid to filter the results.
- Your company might display only its preferred vendors in the left column.
- The shaded column, if any, displays the type of car defined in your company's travel policy.
- To see a particular size of car, click the cell with the car size. The search results below will reflect that choice.
- To see cars for a particular vendor, click the cell for that vendor. The search results below will reflect that choice.
- To see cars of a particular size and a particular vendor, click the appropriate cell. The search results below will reflect that choice.

**STEP 3: SORT THE RESULTS**

If you want to sort your results, click the Sorted By dropdown arrow, and then select the appropriate option.

**STEP 4: REVIEW THE RESULTS**

1. Review the price and options.
2. Click the picture of the car (if available) to see a larger picture as well as passenger and luggage capacity.
3. Click Location details for more information about the available options.
**Step 5: Select the Rental Car**

1. Click the **Total cost** button.
   
   Note that a yellow caution sign next to the **Total cost** button will indicate if the selection is out of policy compliance. If this is the case, you will be prompted to select a reason and this information will be sent to your supervisor.

   The **Review and Reserve Car** page appears.

2. Review the details for accuracy.

3. Select a rental car program, as needed.

4. Select a method of payment, if necessary.

5. Click **Reserve Car and Continue**.

   If you requested the car using the Flight 🛫 tab, and you elected to reserve a hotel room, Travel will display those search result pages.
BOOKING A HOTEL
If you are booking a conference hotel, you will not use the Travel module. You will need to book the hotel directly with the conference in order to get the conference rate.

**STEP 1: SEARCH FOR YOUR HOTEL**

1. If you require a hotel *but not airfare*, from the Concur home page, click the Hotel tab.
2. Enter the Check-in and Check-out Dates (or click in the fields to use the calendar).
3. Enter the search radius.
   Concur will always show company preferred hotels within a larger radius, usually 30 miles or kilometers.
4. Choose to search near an Airport, Address, Company Location, or Reference point / Zip Code, and then enter the appropriate information in the available fields.
5. If you will be using more than one hotel on your trip, select the Add Another Hotel check box. Additional fields will appear. The Check-in Date field for the second hotel is automatically populated with the check-out date of the first hotel. Change the date as necessary.
6. Click Search.
   The hotel search results appear.

**STEP 2: CHANGE AND FILTER YOUR SEARCH**

1. In the Change search area:
   - Change your check-in and check-out dates, and your hotel location.
   - Click Search.
   Travel displays the new results.
2. Use the slider in the Price area to narrow your search.
3. In the Hotel chain area, select the appropriate hotels.
4. In the Hotel Amenities area, select the appropriate options.
STEP 3: REVIEW THE HOTEL MAP

1. Review the hotel map.

   ![Hotel Map Image]

2. Click any blue icon to see specific hotel information. Use your mouse to zoom, and move the map, as needed.

   The red 🔔 icon indicates your reference point, and the blue ⬇️ icon shows your company’s preferred hotels.

STEP 4: SORT THE SEARCH RESULTS (AS NEEDED)

Below the map, use the **Hotel Name Search** and **Sorted By** fields to sort the results.
STEP 5: REVIEW THE RESULTS

A picture, as well as, the name, address, rating stars, and price range appears.
1. Click the picture to see more images.
2. Click Hotel details to see contact information, street address, cancellation policy, and information about the facility.
3. Click View Rooms to see:
   - The available room options and rates
   - Other amenities per room/rate
   - Rules and cancellation policy

STEP 6: SELECT THE HOTEL ROOM

1. Click the Cost button next to the room that you want to reserve.

   Note that a yellow caution sign next to the Fare button will indicate if the selection is out of policy compliance. If this is the case, you will be prompted to select a reason and this information will be sent to your supervisor.

   The Review and Reserve Hotel page appears. Navigate through the page and:
   - Review or modify the room preferences.
   - Verify or modify the guest and program information.
   - Review the price summary.
   - Select a method of payment, if available, as defined by your company’s configuration.
   - Review and accept the rate details and cancellation policy.
2. Select the I agree to the hotel’s rate rules, restrictions, and cancellation policy check box.
3. Click Reserve Hotel and Continue.

   Your Travel Details page (itinerary) displays.
CREATING AN EXPENSE TO PAY FOR ADVANCE CHARGES ON TRAVEL CARD

The Expense module will allow for advance charges booked through the Travel module or directly to the State’s travel card to be expensed when the charge from the travel card has imported into your profile from the bank. This will be important to do in order to keep the travel card from incurring interest charges on trips booked well in advance of the travel dates. A separate guide will be available to walk you through this process.
CREATING AN EXPENSE REPORT

1. Select the Request tab on the menu bar.

2. Select Manage Requests. This will give you a list of all active requests.

3. Under the Action column, the option for “Expense” will be available for any approved requests. Select Expense to begin creating the expense report.

4. The link should take you to the following screen:

   Note: Required fields are marked with a red bar.

   - Policy – The Policy will default to the Policy on the Request.
   - Report Name – The Report Name should default from the Request.
   - Report Date – This field will default to the current date.
   - Comment – Enter any necessary comments that your approver will need to approve the expense report.
• **Department** – This information should default based on the user. *This will determine how the expense is posted, but your approver will have the ability to change this information if necessary.*

• **Accounting Group** - This information should default based on the user. *This will determine how the expense is posted, but your approver will have the ability to change this information if necessary.*

• **Accounting Template** - This information should default based on the user. *This will determine how the expense is posted, but your approver will have the ability to change this information if necessary.*

• The Request tied to the expense report should be visible. If it is not, you can select the **Add** button to choose a different request. Note: Only one request per expense report is allowed.

5. Select **Next** in the bottom right-hand corner of the screen.

6. Creating your travel allowance itinerary:

   ![Travel Allowance Itinerary](image)

   • **Itinerary Name** – This will default to the Report Name.

   • **Selection** – This field will default to USGSA CONUS for agencies that will reimburse the CONUS per diem. For the agencies that continue to reimburse based on actual expenses, you will select USGSA Actuals. *Note: Please see [Creating Travel Allowance for Receipts](#) for assistance with this process.*

   ![Itinerary Info](image)

   • **Departure City** – Enter the city you are departing from.
• **Date** – Enter the date your travel began.
• **Time** – Enter the time your travel began.
• **Arrival City** – Enter the city you traveled to.
• **Date** – Enter the date you arrived at your destination.
• **Time** – Enter the time you arrived at your destination.
• **Select Save.** This should be the itinerary for your depart date.

Note: You will repeat this process for the return itinerary or any other stops.

• **Departure City** – This will default from the Arrival City in the prior itinerary entry screen.
• **Date** – Enter the date you departed.
• **Time** – Enter the time you departed.
• **Arrival City** – This will default from the Departure City in the prior itinerary entry screen.
• **Date** – Enter the date you arrived.
• **Time** – Enter the time you arrived.
• **Select Save.** This should be the itinerary for your return date.

7. If there are no other stops, select **Next.** You should have at least two lines visible (depart date and return date).

8. Review the itinerary information for accuracy and select **Next.** You can edit from this screen if a correction is necessary.
9. The next screen will allow you to select individual meals that were provided by a conference. If any personal days were taken, you can select the row to exclude the entire day from the CONUS calculation.

![Image of the travel allowances screen]

10. Select **Create Expenses**.

11. If you have travel card charges, select **Import Expenses** to pull them to the expense report.

![Image of the expense report screen]
12. Select transaction(s) click **Move** to add them to the current expense report.

13. The transaction is pulled into the expense report and ready for additional information to be entered.

- **Expense Type** – This field will default if you manually select an expense type. If you select a credit card transaction, be sure the expense type is accurate based on the charges.
- **Transaction Date** – This field will default if a loaded credit card transaction is selected. If a manual charge is added, this field will need to be completed.
- **Business Purpose** – This field may be required based on agency policy.
- **Vendor** – This field will default if a loaded credit card transaction is selected. If a manual charge is added, this field will need to be completed.
- **City of Purchase** – Enter the city the purchase took place.
- **Payment Type** – Enter the payment type used. If a loaded credit card transaction is selected, AL-VISA will default.
- **Amount** – Enter the amount of the reimbursement.
- **Request** – This field shows the amount that was requested.
14. Any business expenses that were not paid with the State’s travel card will need to be manually entered. You may do so by selecting the expense type from the options on the right of the screen.

- **Expense Type** – This field will default if you manually select an expense type.
- **Transaction Date** – If a manual charge is added, this field will need to be completed.
- **Business Purpose** – This field may be required based on agency policy.
- **Vendor** – This field will default if a loaded credit card transaction is selected. If a manual charge is added, this field will need to be completed.
- **City of Purchase** – Enter the city the purchase took place.
- **Payment Type** – Enter the payment type used. If a loaded credit card transaction is selected, AL-VISA will default.
- **Amount** – Enter the amount of the reimbursement.
- **Request** – This field shows the amount that was requested.
15. When keying a hotel reimbursement, select **Itemize** at the bottom right-hand corner. This will allow you to key the nightly rate and associated taxes and parking.

- Select **Save Itemizations** and you will be redirected back to the expense screen.

16. Each expense, except for the M&IE rate and Agency Booking Fees, will need a receipt attached. You can do so by selecting the **Attach Receipt** button in each expense type.

17. The expense can also be allocated to different accounting templates by selecting the **Allocate** button. *Note: Approvers in the workflow will have the capability to make adjustments to allocations as necessary.*

18. Personal Car Mileage – enter the transaction date and select the **Mileage Calculator** link.
• Enter the points of travel and **Calculate Route**. Commute miles can be deducted from the calculation by clicking the **Deduct Commute** button. Select **Add Mileage to Expense**.

![Mileage Calculator](image)

• Add any additional expenses and attach receipts.

19. Select **Submit Report**.

20. Select **Accept & Submit**.

![Final Review](image)