

GA Travel and Expense

With Concur Technologies



Travel Request Users Guide



GTE Travel & Expense –Travel Request User’s Guide

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Welcome to GA Travel & Expense

GA Travel & Expense with Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools traveling State of Georgia employees need to create and submit Travel Requests, book travel as well as create and submit Expense Reports. Managers use the service to review and approve expense reports, Cash Advance Requests and Travel Requests. Back-office employees use the service to produce audit reports, ensure Travel Policy compliance, and deliver business intelligence to help the State of Georgia manage its costs.

Section 1: Log on to GA Travel & Expense

How to...

1. Log on to GA Travel & Expense with the username and password provided by your Local GA Travel & Expense Administrator.

Additional Information

Your password is case sensitive.

If you are not sure how to log on, check with your Local GA Travel & Expense Administrator or contact the SAO Customer Service Center.



The screenshot shows the Concur login interface. At the top, there are language selection links: English (US), English (UK), Deutsch, Français, Français canadien, Español, Português (Brasil), Nederlands, Italiano, and Svenska. The main content area is titled "Welcome" and includes a "Notice" section. The notice states: "If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below." Below this, there is a French translation: "Si vous éprouvez des difficultés à ouvrir une session dans ce site, veuillez cliquer sur le lien [Vous avez oublié votre mot de passe?](#) ci-dessous." The Concur logo is displayed on the left. Below the notice is a "Login" section with a dark blue header. It contains two input fields: "User Name" and "Password". There is a checked checkbox labeled "Remember user name on this computer" and a "Login" button. Below the button are two links: "[Forgot your user name?](#)" and "[Forgot your password?](#)". A note at the bottom of the login section states "Passwords are case sensitive." At the bottom of the page, there is a promotional banner for Concur's mobile solution, featuring an image of a hand holding a smartphone and the text: "Make your life easier with Concur's mobile solution. This is what smartphones were made for. [Click here to learn more.](#)"



Section 2: Create a Travel Request

Depending on Agency policy, employees may be required to submit a Travel Request to get pre-trip authorization before incurring travel expenses. Travel Request allows you to create and submit Travel Requests for pre-trip authorization as well as attach that information to Expense Reports - all on line. If Request (Travel Request) does not appear as a tab or section accessible from the My Concur page then the Agency has not elected to use this option. Contact the Local Travel Administrator for additional questions.

How to...

1. Click on the Request tab on the menu bar.
2. Select New Travel Request.

Additional Information

The **Travel Request** area opens.
A new **Travel Request Header** opens.

View Travel Requests [New Travel Request](#) Quick Search

Travel Request Cancel Save Print / Email Delete Travel Request Submit Travel Request

Request Name: _____ Purpose: _____ Status: Not Submitted

Travel Request Header Segments Approval Flow Audit Trail

Request Name _____ Trip Type _____ Request Policy *SOG Request Policy 1

Start Date _____ End Date _____ Purpose _____

Comment _____

3. Complete the required fields on the **Travel Request Header**.

- **Request Name** - Enter a name for the Travel Request.
- **Trip Type** – Select **In-State**, **Out-Of-State** or **International** from the drop down menu.
- **Start Date** – Enter the start date for your trip
- **End Date** – Enter the end date for your trip
- **Purpose** – Enter the purpose for the trip

4. Use the **Comment** field to enter any information your approver will need to approve the Travel Request.

The **Comment** field can hold quite a bit of information.

5. Click on the **Segments** tab.

Travel Request Cancel Save Print / Email Delete Travel Request Submit Travel Request

Request Name: _____ Purpose: _____ Status: Not Submitted

Travel Request Header **Segments** Approval Flow Audit Trail

Request Name Peace Officers Conf Feb 2-6 Trip Type Out of State Travel Request Policy *SOG Request Policy 1

Start Date 12/02/2011 End Date 12/06/2011 Purpose Annual conference and certification training

Comment Certification and delivering spotlight lecture.



Section 2: Create a Travel Request (Continued)

How to...

Additional Information

The **Segments** Section opens.

3. Click on the icon representing a Travel Request type.

Each icon represents a different request type for pre-trip authorization: airfare, car rental, hotel, meals and miscellaneous.

You can have multiple segment types and multiples of the same segment type.

- A. Click on the **Airfare** icon.



The **Air Ticket** segment opens.

- 1) Enter the estimated cost of your airfare in the **Amount** field.
- 2) The system defaults to Round Trip but you can change it to One Way by clicking on the radio button if necessary.
- 3) Enter your departure location in the **From** field.
- 4) Enter your destination in the **To** field.
- 5) Enter your departure date in the Outbound **Date** field.
- 6) Enter your return date in the Return **Date** field.
- 7) Enter any comments regarding the airfare segment in the **Comments** field.
- 8) Click **Save**.

Comments are not required but may provide information necessary to have the travel approved.



Section 2: Create a Travel Request (Continued)

How to...

Additional Information

The screenshot shows the 'Add Segment' form for a Car Rental. The 'Amount' field is set to 225.00 USD. The 'Pick-up' section has 'City' set to Orlando, Florida and 'Date' set to 02/02/2012. The 'Drop-off' section has 'City' set to Orlando, Florida and 'Date' set to 02/06/2012. A red arrow points to the 'Save' button.

B. Click on the **Rental Car** icon.



The **Rental Car** segment opens.

- 1) Enter the estimated amount for a rental car in the **Amount** field.
- 2) In Pick-up enter the Car pick-up location in **City** and the pick-up date in **Date**.
- 3) In Drop-off enter the Car drop-off location in **City** and the drop-off date in **Date**.
- 4) Scroll down and enter any necessary comments in the **Comments** field.
- 5) Click **Save**.

C. Click on the **Hotel** icon.



The **Hotel** segment opens.

The screenshot shows the 'Add Segment' form for a Hotel Reservation. The 'Amount' field is set to 400.00 USD. The 'Check-In' section has 'City' set to Orlando, Florida and 'Date' set to 12/02/2011. The 'Check-Out' section has a 'Date' field. A red arrow points to the 'Save' button.

- 1) Enter the estimated amount for hotel charges in the **Amount** field.
- 2) Enter the hotel location in City and expected check-in date in **Date**.
- 3) Enter comments in the **Comments** field.
- 4) Click **Save**.



Section 2: Create a Travel Request (Continued)

How to...

Additional Information

D. Click on the Meals icon.



The **Meals** segment opens.

The screenshot shows the 'Add Segment' form with the 'Dining' segment selected. The 'Amount' field is set to 225.00 USD and is circled in red. A red arrow points to the 'Save' button. The form includes fields for 'Start' and 'End' dates, a 'Detail' field, and a 'Comment' field.

- 1) Enter the estimated amount for meals in the **Amount** field.
- 2) Click **Save**.

E. Click on the **Misc** icon.



The **Misc** segment opens.

The screenshot shows the 'Add Segment' form with the 'Miscellaneous' segment selected. The 'Amount' field is set to 0.00 USD and is circled in red. A red arrow points to the 'Save' button. The form includes fields for 'Departure City', 'Arrival Date', and 'Departure Detail'.

- 1) Enter the estimated amount for any miscellaneous expenses in the **Amount** field.
- 2) Click **Save**.
4. Review your Travel Request before submitting for approval.
5. Click **Submit Travel Request**.

Scroll down to the **Comments** field and detail what the request is for.

Once you submit your travel request you cannot make any changes unless your approver or the Back Office returns it to you for adjustment.

The screenshot shows the 'Travel Request 227V' summary page. The 'Submit Travel Request' button is highlighted with a red arrow. The page displays the request name, purpose, status (Not Submitted), and amount (\$1,500.00). Navigation tabs for 'Travel Request Header', 'Segments', 'Approval Flow', and 'Audit Trail' are visible at the bottom.



Section 2: Create a Travel Request (Continued)

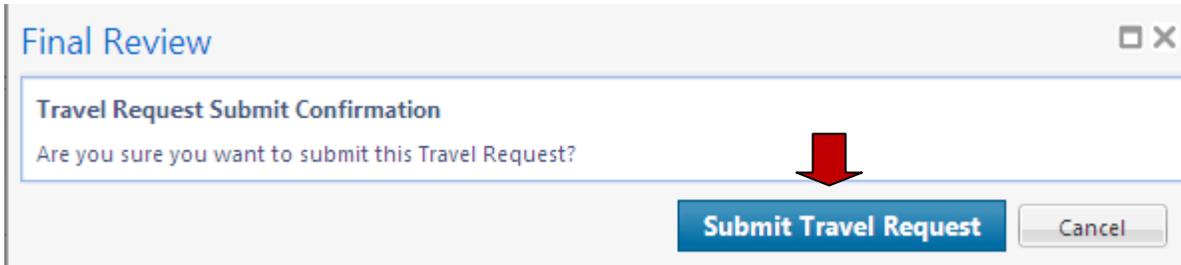
How to...

6. Click **Submit Travel Request** to forward the Travel Request for approval.

Additional Information

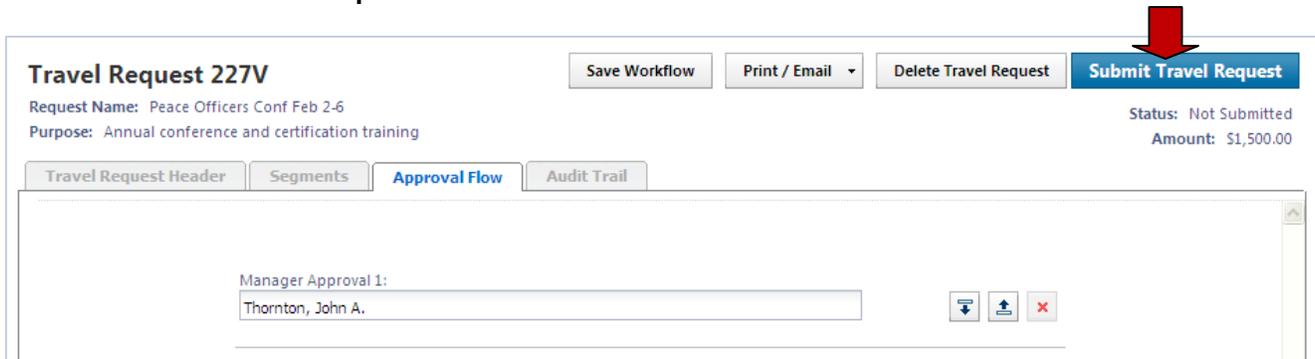
The **Final Review** dialogue box opens.

NOTE: If you click Cancel, the Travel Request is not deleted, it just isn't sent for approval at this time. You can go back and send it later.



The **Approval Flow** tab opens.

7. Click **Submit Travel Request**.



The **Travel Request** has now been sent to your first level of approval.



Section 3: Correct and Resubmit a Returned Travel Request

All Travel Requests whether sent, returned or approved will appear in the **Active Work** Section of **My Concur** under the **Travel Request** tab. If an Approver or Back Office Processor has an issue with all or part of your Travel Request, the entire Travel Request will be returned to you for adjustment. The Travel Request will be marked with an orange “returned” icon (see below).

Active Work						
New Travel Request		View Travel Requests				
Travel Requests (8)		Expense Reports (13)		Cash Advances (8)		
	Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
	SHRM Conference Washington DC Required CE's	227H	Approved	01/15/2012 01/20/2012	USD 950.00	
	Requirement 1220611 Review	227P	Not Submitted	12/06/2011 12/09/2011		
	Peace Officers Conf Feb 2-6 Annual conference and certification training	227V	Submitted & Pending Approval - Thornton, John A	12/02/2011 12/06/2011	USD 1,500.00	
	Certification Workshop 11/20 to Certification	227E	Sent Back to Employee - System, Concur	11/20/2011 11/23/2011	USD 575.00	

How to...

1. Access an Expense Report from the Travel Requests tab of the Active Work by clicking on the Travel Request Name.
2. Click on the **Segments** tab.

Additional Information

The Travel Request opens to the Travel Request Header. Instructions on what you need to correct will be visible in the comments section.

Use the scroll bar to access the segment or segments you need to make corrections to.

Travel Request 227E

Request Name: Certification Workshop 11/20 to
Purpose: Certification

Print / Email Submit Travel Request

Status: Sent Back to Employee
Amount: \$575.00

Travel Request Header **Segments** Approval Flow Audit Trail

Add Segment
Click icon to create segment

Car Rental Amount: \$250.00 Modify Delete

Pick-up City: Alpharetta, Georgia
Date: Sunday, November 20, 2011

Click the **Modify** button for the segment you need to adjust.

3. Click on the **Save**.

You modify each segment separately. To delete a segment, select the Delete button.

You may also add segments by selecting the appropriate segment icon and completing the information.

You must click **Save** for each segment you modify.



Section 3: Correct and Resubmit a Returned Travel Request (continued)

How to...

Additional Information

The screenshot shows the 'Add Segment' dialog box with the 'Car Rental' segment selected. The amount is set to 250.00 USD. The pick-up location is Alpharetta, Georgia, on 11/20/2011. The drop-off location is also Alpharetta, Georgia, on 11/23/2011. A red arrow points to the 'Save' button.

4. Click the **Submit Travel Request** button to resubmit the request for approval.

The screenshot shows the 'Travel Request 227E' final review dialog box. The status is 'Sent Back to Employee' with an amount of \$575.00. A red arrow points to the 'Submit Travel Request' button, which is circled in red. The dialog box contains a 'Previous Comment' and various fields for request details.

5. Click the **Submit Travel Request** button in the Final Review dialogue box.

The screenshot shows the 'Final Review' dialog box with the message: 'Travel Request Submit Confirmation. Are you sure you want to submit this Travel Request?'. A red arrow points to the 'Submit Travel Request' button, which is circled in red.



Section 3: Correct and Resubmit a Returned Travel Request (continued)

How to...

6. Click the **Submit Travel Request** button in the **Approval Flow** dialogue box.

Additional Information

The screenshot shows the 'Travel Request 227E' interface. At the top, there are navigation links: 'View Travel Requests', 'New Travel Request', and 'Quick Search'. The main header displays 'Travel Request 227E' and 'Request Name: Certification Workshop 11/20 to'. Below this, 'Purpose: Certification' is shown. On the right side, there are buttons for 'Save Workflow', 'Print / Email', and 'Submit Travel Request'. The 'Submit Travel Request' button is highlighted with a red circle and a red arrow pointing to it. Below the buttons, the status is 'Status: Sent Back to Employee' and the amount is 'Amount: \$575.00'. There are also tabs for 'Travel Request Header', 'Segments', 'Approval Flow', and 'Audit Trail'. The 'Approval Flow' tab is active, showing a 'Manager Approval 1:' section with a text input field containing 'Thornton, John A.' and three icons (down arrow, up arrow, and red X).

The **Travel Request** will be resubmitted for approval with your changes.



Section 4: Recall a Submitted Travel Request

If you have submitted a Travel Request for approval and it has not been processed you may be able to **Recall** it and make changes.

All Travel Requests whether sent, returned or approved will appear in the **Active Work** Section of **My Concur** under the **Travel Request** tab.

Active Work

New Travel Request View Travel Requests

Travel Requests (8) Expense Reports (13) Cash Advances (8)

	Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
	SHRM Conference Washington DC Required CE's	227H	Approved	01/15/2012 01/20/2012	USD 950.00	
	Requirement 1220611 Review	227P	Not Submitted	12/06/2011 12/09/2011		
	Peace Officers Conf Feb 2-6 Annual conference and certification training	227V	Submitted & Pending Approval - Thornton, John A	12/02/2011 12/06/2011	USD 1,500.00	
	Certification Workshop 11/20 to Certification	227E	Sent Back to Employee - System, Concur	11/20/2011 11/23/2011	USD 575.00	

How to...

1. Access a **Travel Request** from the **Travel Requests** tab of the **Active Work** section by clicking on the **Travel Request Name**.
2. Click on the **Recall** button.

Additional Information

The Travel Request opens.
You can only Recall a Travel Request if it has not yet been approved.

View Travel Requests New Travel Request Quick Search

Travel Request 227V Print / Email Recall

Request Name: Peace Officers Conf Feb 2-6
Purpose: Annual conference and certification training Status: Submitted & Pending Approval
Amount: \$1,500.00

Travel Request Header Segments Approval Flow Audit Trail

Previous Comment View all

Entered By William Abercrombie: Certification and delivering spotlight lecture.

Request Name	Trip Type	Request Policy
Peace Officers Conf Feb 2-6	Out of State Travel	*SOG Request Policy 1
Start Date	End Date	Purpose
12/02/2011	12/06/2011	Annual conference and certification training

3. The **Travel Request** opens and a **Confirmation** dialogue box opens.
4. Click **Yes** to confirm recalling the **Travel Request**.

Please Confirm X

Are you sure you want to recall this travel request?



Section 4: Recall a Submitted Travel Request (continued)

How to...

Additional Information

You may correct any date in the **Travel Request Header**. To, add or delete segments, click on **Segments**.

5. Click on **Submit Travel Request**.

The screenshot shows the 'Travel Request 227V' interface. At the top right, there are buttons for 'Cancel', 'Save', 'Print / Email', and 'Submit Travel Request'. The 'Submit Travel Request' button is circled in red, and a red arrow points to it from above. Below the buttons, the request details are displayed: Request Name: Peace Officers Conf Feb 2-6, Purpose: Annual conference and certification training, Status: Sent Back to Employee, Amount: \$1,500.00. The 'Travel Request Header' tab is selected, showing fields for Request Name, Trip Type, Request Policy, Start Date, End Date, and Purpose. A 'Previous Comment' section is also visible.

6. Click **Submit Travel Request** again in the Final Review dialogue box.

The screenshot shows a 'Final Review' dialog box. It contains the text 'Travel Request Submit Confirmation' and 'Are you sure you want to submit this Travel Request?'. At the bottom, there are two buttons: 'Submit Travel Request' and 'Cancel'. A red arrow points to the 'Submit Travel Request' button.

7. Click on **Submit Travel Request** in the **Approval Flow** dialogue box.

The screenshot shows the 'Travel Request 227V' interface with the 'Approval Flow' tab selected. At the top right, there are buttons for 'Save Workflow', 'Print / Email', and 'Submit Travel Request'. The 'Submit Travel Request' button is circled in red, and a red arrow points to it from above. Below the buttons, the request details are displayed: Request Name: Peace Officers Conf Feb 2-6, Purpose: Annual conference and certification training, Status: Sent Back to Employee, Amount: \$1,500.00. The 'Approval Flow' section shows 'Manager Approval 1: Thornton, John A.' with a dropdown menu and icons for 'down', 'up', and 'close'.

The recalled **Travel Request** has been resubmitted for approval.



Section 5: Link Travel Requests to an Expense Report

Travel Requests are not linked to an Expense Report during the approval process because you control the Expense Report name. One of the following actions must be taken to link an approved Travel Request to the Expense Report containing the actual expenses for that Travel Request.

Create a New Expense Report from a Travel Request

How to...

1. Click on the **Travel Request** tab in the **Active Work** section on the **My Concur** page.

Additional Information

A list of all Travel Requests appears – approved, returned, submitted but pending approval and created but not submitted.

Approved Travel Requests will display the  icon in the **Total Expense Report?** column.

Active Work

New Travel Request View Travel Requests

Travel Requests (7) Expense Reports (13) Cash Advances (8)

	Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
	Peace Officers Conf Feb 2-6 Annual conference and certification training	227V	Approved	02/02/2012 02/06/2012	USD 1,500.00	
	SHRM Conference Washington DC Required CE's	227H	Approved	01/15/2012 01/20/2012	USD 950.00	
	Requirement 1220611 Review	227P	Not Submitted	12/06/2011 12/09/2011		
 	Certification Workshop 11/20 to Certification	227E	Submitted & Pending Approval - Thornton, John A	11/20/2011 11/23/2011	USD 575.00	
 	test test	227J	Sent Back to Employee - System, Concur	11/06/2011 12/10/2011	USD 325.00	
	Conference in DC 10-23 to 28 Biannual Conference	2278	Approved	10/23/2011 10/28/2011	USD 1,150.00	 

2. Click on the  icon of the **Travel Request** you want to create an Expense for.

The **Report Header** for a new **Expense Report** opens. Some information from the **Travel Request Header** will populate the **Expense Report Header**.

Create a New Expense Report

Report Header

Report Date: 12/27/2011
 Report Name: Conference in DC 10-23 to 28
 Trip Type: 
 Policy: State of Georgia Expense Policy 1
 Trip Start Date: 
 Trip End Date: 

Purpose of Trip: Biannual Conference
 Comment:
 Report Key:
 AP Vendor ID: 0000381129
 Special Activity:

Travel Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/>	Conference in DC 10-23 to 28	2278	No	\$1,150.00	\$1,150.00	\$1,150.00

Next >> Cancel



Section 5: Link Travel Requests to an Expense Report

Create a New Expense Report from a Travel Request (continued)

How to...

3. Complete the required fields and edit any pre-populated fields where necessary.
4. Click **Next**
5. Select **Yes** to enter any Meals Per Diem for this Expense Report.

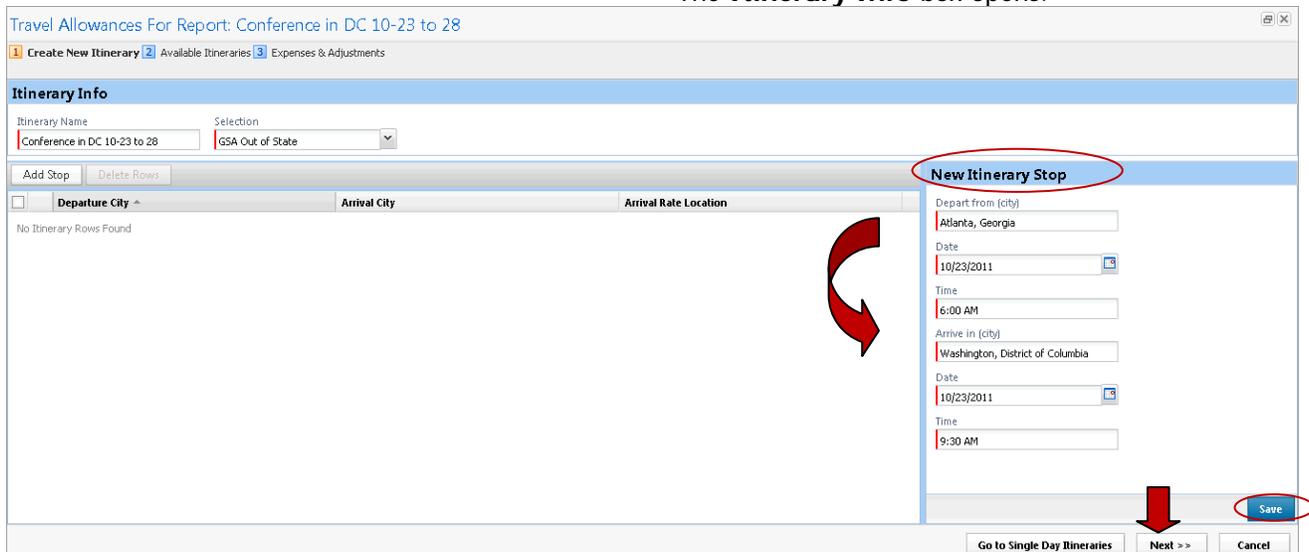
Additional Information

NOTE: The **Travel Request** you had selected has been linked to the **Expense Report** you are creating.

The **Travel Allowances** dialogue box opens.



The **Itinerary Info** box opens.



6. Enter the first leg of your trip in **New Itinerary Stop**.
 - a. Enter the **Depart from city**, **Date** of departure, **Time** of departure, **Arrive in city**, arrival **Date** and arrival **Time**.
 - b. Click **Save**
7. Enter the last leg of your trip as the second **Itinerary Stop**.
 - a. Your **Depart from city** will be populated from the **Arrive in city** in the previous step.
 - b. Enter the **Date** of departure, **Time** of departure, **Arrive in city** (final destination – generally your home address), arrival **Date** and arrival **Time**.

NOTE: Travel Allowances are Meals Per Diem. This process creates an Itinerary for meals and is not the same as a Travel Itinerary. This information is used to calculate any Meals Per Diem reimbursements you are eligible for.



Section 5: Link Travel Requests to an Expense Report

Create a New Expense Report from a Travel Request (continued)

How to...

8. Click **Save**.
9. Click **Next**.

Additional Information

The updated **Itinerary Info** screen appears.

Itinerary Info

Itinerary Name: Conference in DC 10-23 to 28 Selection: GSA Out of State

Departure City	Arrival City	Arrival Rate Location
Atlanta, Georgia 10/23/2010 6:00 AM	Washington, District of Columbia 10/23/2010 9:30 AM	DISTRICT OF COLUMBIA, US-DC, US
Washington, District of Columbia 10/28/2010 6:00 PM	Atlanta, Georgia 10/28/2010 10:00 PM	FULTON COUNTY, US-GA, US

New Itinerary Stop

Depart from (city): Atlanta, Georgia

Date: [Date Picker]

Time: [Time Picker]

Arrive in (city):

Date: [Date Picker]

Time: [Time Picker]

Buttons: Go to Single Day Itineraries, **Next >>**, Cancel

10. Click **Next**.

The **Assigned Itinerary** screen opens.

Travel Allowances For Report: Conference in DC 10-23 to 28

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Conference in DC 10-23 to 28				
Atlanta, Georgia	10/23/2010 6:00 AM	Washington, District of Columbia	10/23/2010 9:30 AM	DISTRICT OF COLUMBIA, US-DC, US
Washington, District of Columbia	10/28/2010 6:00 PM	Atlanta, Georgia	10/28/2010 10:00 PM	FULTON COUNTY, US-GA, US

Available Itineraries

Current Itineraries: [Dropdown] Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

Buttons: << Previous, **Next >>**

11. Click **Next**.



Section 5: Link Travel Requests to an Expense Report

Create a New Expense Report from a Travel Request (continued)

How to...

Additional Information

The **Travel Allowances Expenses & Adjustments** screen opens.

Travel Allowances For Report: Conference in DC 10-23 to 28

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	10/23/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25
<input type="checkbox"/>	10/24/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	10/25/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	10/26/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	10/27/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	10/28/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25

<< Previous Create Expenses Cancel

12. Click on the box in the appropriate meal column for any meals that were provided and you did not have to pay for on this trip.

The system will adjust the daily allowance for that meal. The total you will be reimbursed for each day appears in the Allowance column. High cost, low cost, and GSA rates are built into the system.

13. Click **Create Expenses**.

Travel Allowances For Report: Conference in DC 10-23 to 28

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	10/23/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25
<input type="checkbox"/>	10/24/2010 Washington, District of Columbia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	10/25/2010 Washington, District of Columbia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	10/26/2010 Washington, District of Columbia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	10/27/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	10/28/2010 Washington, District of Columbia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25

<< Previous **Create Expenses** Cancel



Section 5: Link Travel Requests to an Expense Report

Create a New Expense Report from a Travel Request (continued)

How to...

14. The **Expense Report** is created and opens.

Additional Information

Any eligible **Travel Allowances** (Meals Per Diem) are entered on the Expense report and the **Travel Request** is attached to the **Report Header** of the Expense Report.

You may add additional items to the Expense Report as needed at this time or later.

Link a Travel Request to an Existing Expense Report

How to...

1. Select the Expense Report you want to link a Travel Request to from the **Expense Report** tab in the **Active Work** or **Expense Report** section of the **My Concur Page**.

Additional Information

Click on the Expense Report to open it.

The screenshot shows the 'My Concur' navigation bar with tabs for Request, Expense, and Profile. Below is the 'Company Info' section with a welcome message. The 'Active Work' section contains buttons for 'New Expense Report' and 'View Reports'. Underneath, there are tabs for 'Travel Requests (7)', 'Expense Reports (13)', and 'Cash Advances (8)'. A table lists expense reports with columns for Report Name, Status, Payment Status, Report Date, and Requested Amount. A red arrow points to the first row: 'Conference in DC 10-23 to 28 Biannual Conference' with a status of 'Not Submitted' and a requested amount of 'USD 655.00'.

Report Name	Status	Payment Status	Report Date	Requested Amount
Conference in DC 10-23 to 28 Biannual Conference	Not Submitted	Not Paid	12/16/2011	USD 655.00
ttt 8/17 ttt	Sent Back to Employee - Abercrombie, William A	Not Paid	12/01/2011	USD 7.50

2. Click on the **Details** tab.

The **Details** tab options will appear.

The screenshot shows the 'Conference in DC 10-23 to 28' expense report details. At the top right are 'Delete Report' and 'Submit Report' buttons. Below the title is a navigation bar with 'New Expense', 'Details', 'Receipts', and 'Print / Email' tabs. The 'Details' tab is active. On the left, there is a table of expenses with columns for Date, Expense Type, Amount, and Requested. On the right, there is a 'New Expense' form with an 'Expense Type' search field and a list of expense categories: Local Phone, Registration, Long Distance, Other Meals, Company Car Expense, and Group Meals.

Date	Expense Type	Amount	Requested
12/23/2011	Registration Cert Training, Washington, District o	\$550.00	\$550.00
10/06/2011	Airfare Delta Air Lines, Washington, District	\$325.00	\$325.00
10/06/2011	Hotel	\$330.00	\$330.00



Section 5: Link Travel Requests to an Expense Report

Link Travel Request to an Existing Expense Report (continued)

How to...

Additional Information

3. Select **Report Header** from the list that appears.



The **Report Header** opens.

4. Click on **Add** in the **Travel Requests** section of the **Report Header**.

A list of available Travel Requests appears.

Report header for: Conference in DC 10-23 to 28

Report Date 12/16/2011	Report Name Conference in DC 10-23 to 28	Trip Type International	Policy State of Georgia Expense Policy 1
Trip Start Date 10/23/2011	Trip End Date 12/28/2011	Purpose of Trip Biannual Conference	Comment
Report Key 1124	Report Currency US, Dollar	Approval Status Not Submitted	Payment Status Not Paid
AP Vendor ID 0000381129	Special Activity		

Travel Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/>						

5. Select the appropriate **Travel Request** by clicking on the check box next to the Travel Request name.

Available Travel Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Appro...	Amount Remai...
<input type="checkbox"/>	Add Request to Exp RReport	224Q	No	\$50.00	\$50.00	\$50.00
<input type="checkbox"/>	Agency Reviews 0311 to 15...	224K	No	\$503.00	\$503.00	\$503.00
<input checked="" type="checkbox"/>	Conference in DC 10-23 to 28	2278	No	\$1,150.00	\$1,150.00	\$1,150.00
<input type="checkbox"/>	Peace Officers Conf Feb 2-6	227V	No	\$1,500.00	\$1,500.00	\$1,500.00
<input type="checkbox"/>	SE Compliance 09-12 to 16	224N	No	\$926.00	\$926.00	\$926.00
<input type="checkbox"/>	SHRM Conference Washing...	227H	No	\$950.00	\$950.00	\$950.00
<input type="checkbox"/>	Trip to Savannah TEST 9-5 t...	224G	No	\$1,000.00	\$1,000.00	\$1,000.00
<input type="checkbox"/>	Trips 10-1 to 10	2277	No	\$1,725.00	\$1,725.00	\$1,725.00
<input type="checkbox"/>	ttt 8/17	224P	No	\$125.00	\$125.00	\$125.00
<input type="checkbox"/>	Visit 9/15 to 9/21	224T	No	\$200.00	\$200.00	\$200.00



Section 5: Link Travel Requests to an Expense Report

Link Travel Request to an Existing Expense Report (continued)

How to...

6. Click on **Add**.

Additional Information

The Travel Request now appears in the **Travel Request** section of the **Report Header**.

Report header for: Conference in DC 10-23 to 28

Report Date 12/16/2011	Report Name Conference in DC 10-23 to 28	Trip Type International	Policy State of Georgia Expense Policy 1
Trip Start Date 10/23/2011	Trip End Date 12/28/2011	Purpose of Trip Biannual Conference	Comment
Report Key 1124	Report Currency US, Dollar	Approval Status Not Submitted	Payment Status Not Paid
AP Vendor ID 0000381129	Special Activity		

Travel Requests						
Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining	
<input type="checkbox"/> Conference in DC 10-23 ...	2278	No	\$1,150.00	\$1,150.00	\$1,150.00	

Buttons: Add, Remove, Save, Cancel

7. Click on **Save**.

The Travel Request is now attached to the Expense Report. You may continue to add expenses and any additional expense information you need to this expense report.

Keep in mind that each expense report can only contain one travel type: In-state Travel, Out of State Travel or International Travel.



Section 6: Detach Travel Requests Linked to an Expense Report

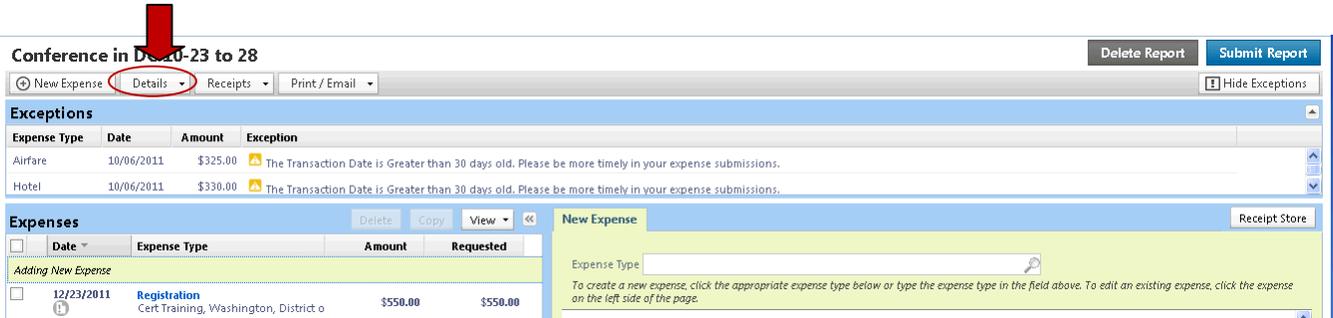
The following process is used if you attach a Travel Request to the wrong Expense Report and need to remove it.

How to...

1. Access the Expense Report you wish to remove a Travel Request from.

Additional Information

You can access the Expense Report from the **Active Work** section of the **My Concur** page by clicking on it to open it.



2. Click on the **Details** Tab and select **Report Header** from the **Report** section of the drop down menu.

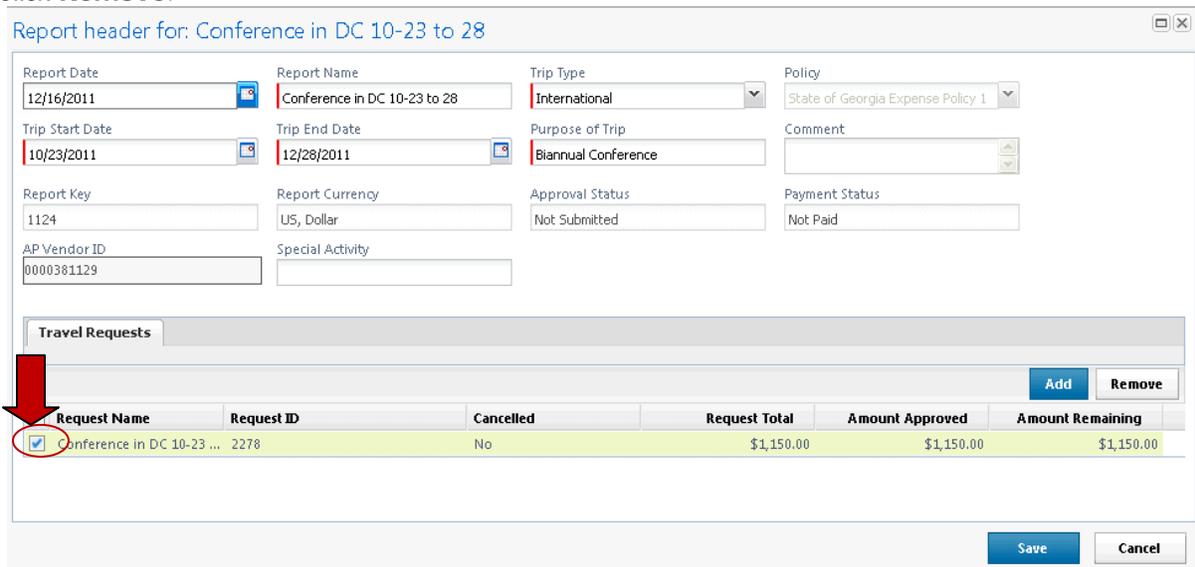


The Report Header opens.

3. Click the check box next to the **Travel Request(s)** you wish to detach from the Expense Report.

You may attach multiple Travel Requests to an Expense Report and you may detach one or multiple Travel Requests from an Expense Report.

4. Click **Remove**.

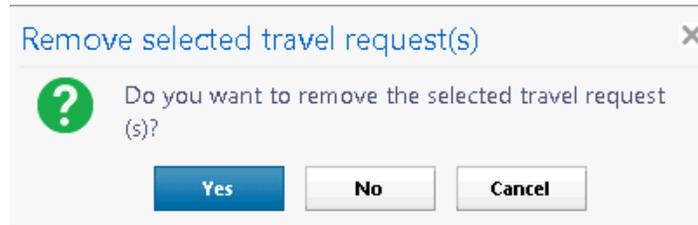


Section 6: Detach Travel Requests Linked to an Expense Report (continued)

How to...

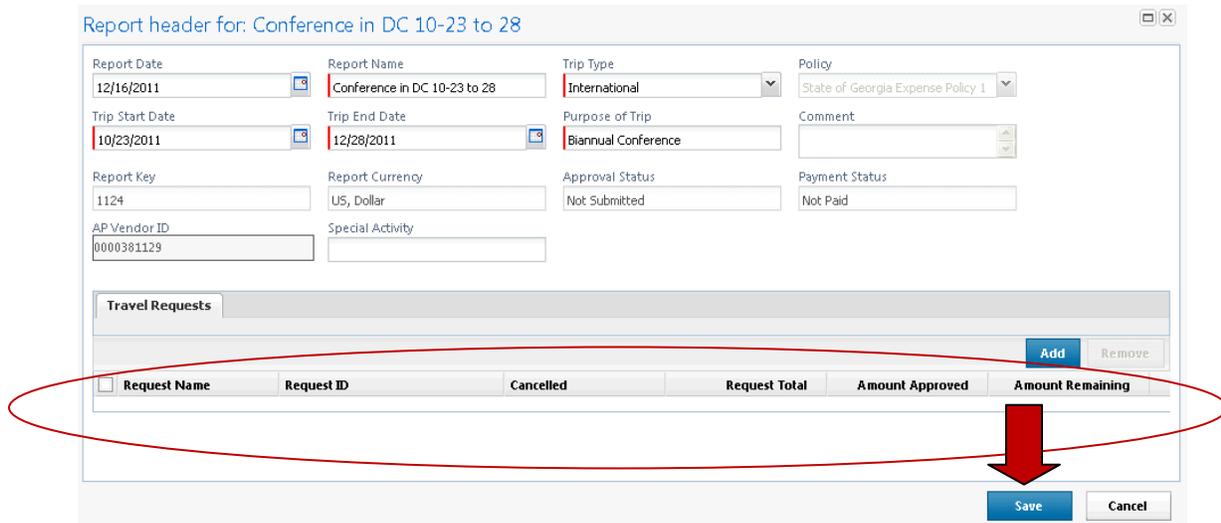
Additional Information

5. Click **Yes** in the confirmation box that appears.



The **Expense Report Header** opens and the **Travel Requests** selected for removal from the Expense Report no longer appear in the **Travel Requests** section.

NOTE: Detaching a Travel Request from an Expense Report does NOT delete the Travel Request from the system.



6. Click **Save**.

NOTE: The selected Travel Request is no longer attached to the Expense Report. Detaching a **Travel Request** from an **Expense Report** does NOT delete the **Travel Request** from the system.

7. The **Expense Report** opens.

You can add expense items, edit the expense report or exit the system.



Section 7: Delete a Travel Request

Only Travel Requests with a status of Not Submitted can be deleted.

How to...

1. Select an un-submitted **Travel Request** from the **Travel Request** tab on the Active Work section of the **My Concur** page.

Additional Information

The **Travel Request** opens.

Active Work

New Travel Request View Travel Requests

Travel Requests (7) Expense Reports (14) Cash Advances (8)

Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
Peace Officers Conf Feb 2-6 Annual conference and certification training	227V	Approved	02/02/2012 02/06/2012	USD 1,500.00	
SHRM Conference Washington DC Required CE's	227H	Approved	01/15/2012 01/20/2012	USD 950.00	
Requirement 1220611 Review	227P	Not Submitted	12/06/2011 12/09/2011		
Certification Workshop 11/20 to Certification	227E	Submitted & Pending Approval - Thornton, John A	11/20/2011 11/23/2011	USD 575.00	
test test	227J	Sent Back to Employee - System, Concur	11/06/2011 12/10/2011		
Conference in DC 10-23 to 28 Biannual Conference	2278	Approved	10/23/2011 10/28/2011	USD 1,150.00	
Trips 10-1 to 10 Field Visits	2277	Approved	10/01/2011 10/10/2011	USD 1,725.00	

2. Click on the **Travel Request**.

The **Travel Request** opens.

Travel Request 227P

Request Name: Requirement 1220611 Purpose: Review Status: Not Submitted

Cancel Save Print / Email **Delete Travel Request** Submit Travel Request

Travel Request Header Segments Approval Flow Audit Trail

Request Name: Requirement 1220611 Trip Type: In-State Travel Request Policy: *SOG Request Policy 1

Start Date: 12/06/2011 End Date: 12/09/2011 Purpose: Review

Comment:

3. Click on **Delete Travel Request**



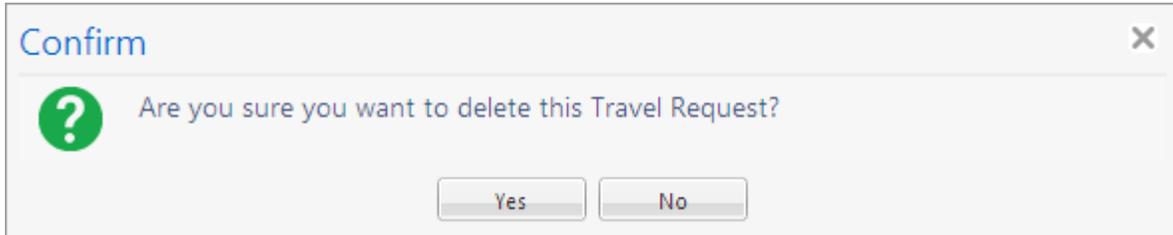
Section 7: Delete a Travel Request (continued)

How to...

4. Click on **Yes** in the **Confirmation** dialogue box that opens.

Additional Information

The un-submitted Travel Request is deleted from the system.



Appendix A: Buttons and Icons

Button/Icon Description	
Add New Allocation	Add New Allocation: Add a new allocation row.
	Airfare: Click to view your airfare booking information.
Allocate By: ▾	Allocate By: Choose between allocating by percentage or amount.
	Allocations: Indicates that an expense entry has been allocated.
	Attendees: Indicates that an expense entry has associated attendees.
Approve	Approve: Approve the expense report for processing.
Approve & Forward	Approve & Forward: Add additional review steps for an expense report.
	Car Rental: Click to view booking information for your car rental.
	Credit Card Transaction: Indicates that an expense entry was from a credit card transaction.
	Comments: Indicates that an expense entry has comments associated with it.
	Create Expense Report: Creates an expense report from a completed Trip Itinerary or a Travel Request.
Delete Report	Delete Report: Deletes the current expense report. *Only originator can delete.
Details ▾	Details: Provides options to view details of the expense report such as the report header, allocations, and audit trail.
	Dining: Click to add a Request for Meals on a Travel Request.
	Exceptions: Indicates that an expense entry has an exception associated with it. Red exceptions create a hard stop. Yellow errors allow you to continue.
Import ▾	Import: Provides access to import trip details or credit card charges to the current expense report.
Itemize	Itemize: Save the current expense entry and begin the itemization process. For example, hotel expenses have to be itemized.
	Lodging: Click to view your lodging (hotel) booking information.
	Misc: Click to add a Request for Miscellaneous Expenses on a Travel Request.
	Mobile Expense: Indicates that the expense was entered in Concur Mobile.
	Multiply: Reverses the exchange rate when working with foreign out of pocket transactions.
New Attendee	New Attendee: Add a never before used attendee to an expense report.
+ New Expense	New Expense: Add a new expense entry to an Expense Report.
New Expense Report	New Expense Report: Create a new expense report.
Next >>	Next: After creating the expense report header go to the next step in the process.
	Personal: Indicates that an expense entry was marked as personal.
Print / Email ▾	Print: Print the fax cover page or detail report for the current expense report.
Receipts ▾	Receipts: Access to attach receipt images or view previously attached receipts.
Reserve	Reserve: Reserves the selected trip details. A green reserve indicates the reservation is within Policy, Yellow indicates out of policy
	Resubmitted: This icon indicates the report was returned. This icon appears when an approver returns a report to a user. It also appears in the Approval Queue of the approver when a user corrects and resubmits a report.
	Seat map: Click to view the flight seat map.



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Button/Icon Description	
	Send Back to Employee: Allows the approver to send the expense report back for corrections.
	Submit Report: Submit the expense report for approval.
	Tooltip: Click the tooltip icon to view the associated field-related help.
	Show / Hide Itemization: Click this icon to view or hide itemization specifics.
	Yellow Diamond: Indicates a company preferred vendor.

