TeamWorks
Travel and Expense

With Concur Technologies

TTE System
User Reference

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DOCUMENT REVISION HISTORY

Date	Notes / Comments / Changes
11/14/11	Minor Corrections to Personal Mileage and Travel Request
1/27/12	Section 6: Cancel or Change Airline, Car Rental or Hotel Reservation – Corrected final step # Section 7: Create an Expense Report from a Completed Trip-Itinerary in Upcoming Trips – Changed title and added clearly identified steps to simplify entry. Entire section renumbered. Section 8: Create a New Expense Report – No Travel Itinerary in Upcoming Trips – Updated title and added separate step for Travel Request for ease in user entry.. Added New Section – Import Company Card Transactions into an Existing Expense Report – This is now section 9. Renumbered previous Sections 9-17 to 10-18 to accommodate the new section. Added Document Revision History to Table of Contents area section.
1/29/12	Corrected reference to reimbursement of checked bag fees to 1 bag.
5/15/12	Section 3, Step 4 and Step 6 – made optional Section 5 – update policy notes for approved Travel Policy Update Section 7 - Step 2 to add Selection option which required a renumbering of the section; updated Policy Notes to reflect approved Travel Policy. Update Section 8 - Changed heading description; Step 2 to add Selection option which required a renumbering of the section; updated Policy Notes to reflect approved Travel Policy. Step 3 updated notes. Update Section 9 - for specific colors for Air and Hotel company paid charges Section 10 – drop the Travel Allowance Itinerary Error section as the audit rule was disabled; Cash Advance sections updated to Travel (Cash) Advance and Policy notes updated; Attach Scanned Images – verbiage on note changed. Section 14 – updated Cash Advance to Travel (Cash) Advance
5/29/12	Added Allocation Favorites to Section 11 Added Copy Expense Report to Section 11
9/25/12	Added View Receipts to Section 16 and renumbered section Updated Section 12 Fax or Attach Receipts to include multiple receipts for the same expense item. Updated document for name change from GTE to TTE.
7/10/13	Updated design Added New Section Change Password which caused a renumbering of all sections starting at Section 3. Updated Profile, Travel Allowances, Allocate Expenses, Receipt Store, Allocations. Requests, Cash Advances Removed Approver details and referenced Approver's Handbook; rearranged sections and subsections. Deleted Creating an Expense Report from a Completed Trip. Changed order of options in Using Special Features. Minor renaming in many sections for clearer presentation.
10/11/13	Updated Section 11, Step 2 (Travel Allowance Entry) of Create an Expense Report for updated data entry format and requirements.

Section 1: Logging In to TTE

Log on to TTE Travel & Expense	
1	In the **User Name** field, enter your ***EmployeeID@domain*** *(i.e., 00123456@sog.ga.gov) Your User Name and initial password will be provided.*
2	In the **Password** field, enter your ***password***.
3	Click **Login**.

If you are not sure how to access TTE Travel & Expense, check with the TTE Travel local administrator for your agency.

Attention:

Throughout the TTE system, REQUIRED fields are marked with red bars.

Section 2: My Concur Tab

Explore the available options	
1	Explore the ***My Concur*** section.
2	Locate the **Trip Search** and **Weather** section.
3	Locate the **Alerts** and **Travel Info** sections.
4	Locate the **Company** Info section.
5	Locate the **Expense Reports** (may be labeled **Active Work** for your agency**)** section. *Active Work will appear if your agency uses Authorization Requests or Cash Advances.*
6	Locate the **Trip List** section.
7	Locate the **Approval Queue** section. **Note:** *This section appears only if you are logged on as an approver.*

Section 3: Change Password

1	At the top of the ***My Concur*** page, click **Profile**.
2	From the **Other Settings** menu on the left side of the page, click **Change Password**.
3	In the **Old Password** field, enter your current password.
4	In the **New Password** field, enter your new password.
5	In the **Re-enter New Password** field, enter your new password.
6	In the **Password Hint** field, enter something to remind you of your password when you have forgotten your password. **Note:** *Without this hint you cannot use the prompts on the TTE login page.* *You do not need to change your password to change your hint.*
7	Click **Submit**.

Section 4: Update Profile

Step 1: Verify Time Zone, Date Format	
1	At the top of the ***My Concur*** page, click **Profile**.
2	From the **Other Settings** menu on the left side of the page, click **System Settings**.
3	On the **System Settings** page, update the appropriate information, and then click **Save**.
Step 2: Update Personal Information	
1	At the top of the ***My Concur*** page, click **Profile**.
2	Click **Personal Information.**
3	On the **Personal Information** update your information as necessary. Make certain you have entered an email address for the TTE system to communicate with you.
4	Enter necessary information in **Travel Preferences** such as air, hotel and car rental preferences, You **MUST** select the Government option at the top of the section or you will not see government rates.
5	TSA information MUST be updated even if you will never plan to make flight reservations.
6	Enter your personal Credit Card information. This is a secure site and your information is protected. Only the last four digits of the card number will display. Select the checkbox next to **Use this card as the default for Hotels.**
7	Click **Save** to save all the data.
Step 3: Set up a Travel Arranger or Assistant - Optional	
1	At the top of the ***My Concur*** page, click **Profile**.
2	Select **Personal Information**.
3	Scroll down to the **Assistants and Travel Arrangers** section.
4	Click **Add an Assistant** located to the right of the section.
5	In the **Search Criteria** field, type the last name of the person you wish to add as an assistant/travel arranger.
6	Click **Search**.

7	From the **Assistant** dropdown menu, select the appropriate assistant.
8	Select **Can Book Travel for Me**.
9	OPTION: Select **Is my primary assistant for travel**, if necessary.
10	Click **Save**.
Step 4: Verify Expense Information	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Information**.
3	On the **Expense Information** page, verify the pre-populated information.
Contact the TTE local administrator for your agency if any Expense Information is incorrect.	
Step 5: Add an Expense Delegate - Optional	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
3	On the **Expense Delegate** page, click **Add Delegate**.
4	In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
5	From the list of matches, select the appropriate person. Click **Add.**
6	Select the responsibilities you wish this delegate to perform on your behalf.
7	Click **Save**.

Step 6: Update Expense Preferences	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Preferences**.
3	In the **Send email when**… section, select the email notifications you prefer.
4	In the **Prompt** section, check **For an approver when an expense report is submitted** to have access to the agency authorized approvers list when your supervisor is not available.
5	Click **Save**.
Step 7: Update Travel Request Preferences	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Travel Request Settings** menu on the left side of the page, click **Travel Request Preferences**.
3	In the **Send email when**… section, select the email notifications you prefer.
4	In the **Prompt** section, check **For an approver when an expense report is submitted** to have access to the agency authorized approvers list when your supervisor is not available.
5	Click **Save**
Step 8: Verify Expense Approvers	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Approvers**.

3	On the **Expense Approvers** page, verify that your default expense approver is correct.
If the approver name listed for the Expense Approver is incorrect or if the field is blank, contact the TTE local administrator for your agency immediately.	
Step 9: Add Personal Car ID	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Personal Car**.
3	On the **Personal Car** page, click **New**.
4	In the **Vehicle ID** field, enter Personal Car Tier I.
5	Click on the **Vehicle Type** drop down arrow and choose *Car – Tier I*.
6	Click **Save.**
7	Click **New.**
8	In the **Vehicle ID** field, enter Personal Car Tier II.
9	Click on the **Vehicle Type** drop down arrow and choose *Car – Tier II*.
10	Click **Save.**
Note: *If you report mileage expense for a motorcycle or personal aircraft, add them as well.*	
Step 10: Add a Favorite Attendee - Optional	
1	At the top of the ***My Concur*** page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Favorite Attendee** then click **New Attendee**
Note: *Attendees are used to identify participants at*	

Group Meal functions. See Policy.

3	From the **Type** dropdown menu, select the appropriate Attendee Type.
4	In the **Last Name** field, enter the last name of the new attendee.
5	In the **First Name** field, enter the first name of the new attendee.
6	In the **Attendee Title** field, enter the job title of the attendee.
7	In the **Company** field, enter the company where the attendee is employed.
8	Click **Save** or **Save & Add Another**

Section 5: Set Up Receipt Store Account

Step 1: Verify your Email Addresses

1	From ***My Concur*** select **Profile** then select **Email Addresses**
2	Click **+ Add an Email Address** to add a new email address. Select **Yes** to Contact for Travel Reservations.

Note: *An email address can only be registered with Concur ONCE. Before linking an Expense Delegate's email address to your image account, be certain they don't need to retain it for their own travel account.*

Step 2: Validate Email

1	Click **Verify**
2	Check your email for a code and instructions from Concur. The email will arrive in less than five minutes.
3	Enter the code into the available box in the Profile and click OK.
4	You will then be able to email receipt images to your Receipt Store at myinbox@concursolutions.com or receipts@concur.com

Note: *Receipt Store will allow you to email receipts and documents into TTE to be used for Expense Reports. These receipts and documents can be accessed from the Receipt Store tab in Expense Reports. You can also upload scanned receipt images from your PC into Receipt Store.*

Section 6: Make a Travel Reservation for Air, Car and Hotel

Step 1: Make a Flight Reservation

1	On the **Flight** tab, select one of these: • Round Trip • One Way • Multi-Segment
2	In the **Departure City** and **Arrival City** Fields, enter the cities for your travel**.**
3	In the **Departure** and **Return** fields, select the preferred travel dates and times.
4	If you need a car, select **Pick-up/Drop-off car at airport**.
5	If you need a hotel, select **Find a Hotel**. Select search parameters.
6	Select **Non-Refundable.** *See note.*

Note: *To view refundable and non-refundable options, enter* ***Refundable****.*

Policy Note: *Refundable fares should be within $150 of a Non-Refundable fare. To search and compare pricing on Refundable and Non-Refundable fares select* ***Refundable****.*

Policy Note: *Choose lower cost flights within +/- 2 hours of preferred flight times.*

Policy Note: *Should choose connecting flights over non-stop if it adds 2 hours or less to travel time and saves $200 or more.*

Policy Note: *Domestic flights – coach class only. Upgrades after booking are at traveler's expense. International flights: Business class is reimbursable when the nonstop portion of the flight exceeds 10 hours. Do not include layover time.*

7	In the **Search Flights By** field, **Price** is the default view. You will be able to view by schedule on a secondary tab in the results.
8	Click **Search**.
9	Flight search parameters can be changed in the panel to the right of the flight matrix to refine your search.
10	Select flight from the flight matrix that appears. Click **Show Details** for more flight data and to preview seat availability **Note***: Flight matrix includes inbound and outbound flight. Click the More Like This + link on a flight to see additional inbound/outbound options.*
11	Click the **View Seat Map** icon next to the flight to preview the availability of seats. You cannot book a seat at this point. The reservation will default to the seat preference set in your Travel Profile.

Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the flight without approval. This is Audited by the State.*

Note: *Air Travel Insurance is automatically included at no cost when you book your company paid reservation through TTE. You* ***do not*** *need to purchase it separately.*

12	Click **Reserve**.

Note: *Access the airline website directly to process baggage. Usually less expensive if done online.*	
Step 2: Reserve a Rental Car	
1	If you specified that you need a car on the **Flight** tab, you will see car results for the car search.
Policy Note: *Enterprise and National rental car contracts are mandatory statewide. Renting outside the Statewide vendor contract requires an* <u>*approved*</u> *Statewide* ***Contract Waiver Request (SPD-NI005)*** *which must be attached to your Expense Report*.	
2	Select the appropriate rental car from the car matrix, and then click **Reserve**.
Note: *Book the car rental through the booking tool. For Enterprise car pick-up/return call the renting location directly to make arrangements. The number appears on your Travel Itinerary.*	
Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a /gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the reservation. This is Audited by the State.*	
Step 3: Reserve a Hotel	
1	If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose your rental car. If this is a Hotel only reservation, click on the Hotel tab and enter location and check in/out dates.
2	Use the filter options to narrow your search by **Amenity**, **Neighborhood**, or **Chain**.
Policy Note: *Travelers are required to submit a copy of the Occupancy Tax Exemption Form to instate lodging vendors at registration. Link to form pops up during registration process. Link to form is also on the* [*SAO Website Online Booking Tool*]() *page.*	
3	Click **Show Details** for a specific hotel to view more detailed information.
4	Click **Choose Room** to view rates and details about the rooms.
5	When ready to reserve your room, click the radio button to the left of the rate, and then click the green **Reserve** button.
Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the flight without approval. This is Audited by the State.*	
6	Review the pop up for rates, dates and cancellation policy. Click the acceptance box to acknowledge acceptance and then click **Continue**.
Step 4: Preview Itinerary	
1	Review the reservation components in your Itinerary. Make any necessary changes or corrections.
2	To change your seat assignment on flight segments, click on **Change Seat.**
3	Your current assignment shows with a person icon. Select a new seat and click **Change Seat**.
4	Click **Next.**
Step 5: Trip Booking Information	
1	Enter a name for your trip in **Trip Name** (include travel dates in name) and optionally add any additional information in the **Description** field.
2	You can send a copy of the itinerary to another person from here.
3	Click **Next.**
Step 6: Trip Confirmation	
1	Verify information such as travel dates, cars, hotels, cancellation policy.
2	To make any changes, click **Previous**.
3	To complete the booking, click **Purchase Ticket**.
4	The booking is complete when you see the **Finished** message and a **Trip Record Locator** number.
Note: *Options to print or email a copy of your itinerary are located at the bottom of the page.*	
5	Click **Return to Travel Center**. Your trip will appear in Upcoming Trips on the ***My Concur*** Page.

Section 7: Making an Air Only Reservation

Step 1:Select Flight	
1	On the **Flight** tab, select one of these: • Round Trip • One Way • Multi-Segment
2	In the **Departure City** and **Arrival City** Fields, enter the cities for your travel.
3	In the **Departure** and **Return** fields, select the preferred travel dates and times.
4	Select **Non-Refundable.** *See note.*

Note: *To view refundable and non-refundable options, enter **Refundable**.* **Policy Note:** *Refundable fares should be within $150 of a Non-Refundable fare. To search and compare pricing on Refundable and Non-Refundable fares select **Refundable**.* **Policy Note:** *Choose lower cost flights within +/- 2 hours of preferred flight times.* **Policy Note:** *Should choose connecting flights over non-stop if it adds 2 hours or less to travel time and saves $200 or more.* **Policy Note:** *Domestic flights – coach class only. Upgrades after booking are at traveler's expense. International flights: Business class is reimbursable when the nonstop portion of the flight exceeds 10 hours. Do not include layover time.*	
5	In the **Search Flights By** field, **Price** is the default view. You will be able to view by schedule on a secondary tab in the results.
6	Click **Search**.
7	Flight search parameters can be changed in the panel to the right of the flight matrix to refine your search.
8	Select flight from the flight matrix that appears. Click **Show Details** for more flight data and to preview seat availability **Note:** *Flight matrix includes inbound and outbound flight. Click the More Like This + link to see additional inbound/outbound options.*
11	Click the **View Seat Map** icon next to the flight to preview the availability of seats. You cannot book a seat at this point. The reservation will default to the seat preference set in your Travel Profile.
Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the flight without approval. This is Audited by the State.*	
Note: *Air Travel Insurance is automatically included at no cost when you book your company paid reservation through TTE. You **do not** need to purchase it separately.*	
12	Click **Reserve**.
Note: *Access the airline website directly to process baggage. Usually less expensive if done online.*	
Step 2: Preview Itinerary	
1	Review the reservation components in your Itinerary. Make any necessary changes or corrections.
2	To change your seat assignment on flight segments, click on **Change Seat.**
3	Your current assignment shows with a person icon. Select a new seat and click **Change Seat**.
4	Click **Next.**
Step 3: Trip Booking Information	
1	Enter a name for your trip in **Trip Name** (include travel dates in name) and optionally add any additional information in the **Description** field.
2	You can send a copy of the itinerary to another person from here.
3	Click **Next**.
Step 4: Trip Confirmation	
1	Verify information such as travel dates, cars, hotels, cancellation policy.
2	To make any changes, click **Previous**.
3	To complete the booking, click **Purchase Ticket**.
4	The booking is complete when you see the **Finished** message and a **Trip Record Locator** number.
Note: *Options to print or email a copy of your itinerary are located at the bottom of the page.*	
5	Click **Return to Travel Center**. Your trip will appear in Upcoming Trips on the ***My Concur*** Page.

Section 8: Making A Car Only Reservation

Step 1: Select Rental Location	
Policy Note: *Enterprise and National rental car contracts are mandatory statewide. Renting outside the Statewide vendor contract requires an approved Statewide **Contract Waiver Request (SPD-NI005).***	
1	Click on the **Car** tab in Trip Search.
2	Enter **Pick-up Date** and **Drop-off Date** and times.
3	Select **Airport Terminal** or **Off Airport** pickup filters. • For Airport, enter the Airport name. The system will help you by displaying the closest match s you type the name in. • For Off Airport click the blue Search to display the search filters. Enter the desired options and click on **Search**. Click **Choose**. Click on the Choose This Car Location link for the desired pickup location. Click **Search**. Click **Continue**.

4	Select the appropriate rental car from the car matrix, and then click **Reserve**.

Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a /gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the reservation. This is Audited by the State.*

Note: *Book the car rental through the booking tool. For Enterprise car pick-up/return call the renting location directly to make arrangements. The number appears on your Travel Itinerary.*

Step 2: Preview Itinerary

1	Review the reservation components in your Itinerary. Make any necessary changes or corrections.
2	Click **Next.**

Step 3: Trip Booking Information

1	Enter a name for your trip in **Trip Name** (include travel dates in name) and optionally add any additional information in the **Description** field.
2	You can send a copy of the itinerary to another person from here.
3	Click **Next** to continue or click **Previous** to make changes.

Step 4: Trip Confirmation

1	Verify information such as travel dates, rates, cancellation policy.
2	Click **Previous** to make changes or **Confirm Booking** to complete the reservation.

Section 9: Making a Hotel Only Reservation

Step 1: Select Hotel

1	Click on the **Hotel** tab in Trip Search.
2	Enter **Check-in Date** and **Check-out Date** and times.
3	Enter Search criteria choosing Airport, Company Location, Address or Reference Point. • Each option has additional filters to complete
4	Click **Search** Click **Choose** Click **Continue**

Policy Note: *Travelers are required to submit a copy of the Occupancy Tax Exemption Form to instate lodging vendors at registration. Link to form pops up during registration process. Link to form is also on the SAO Website Online Booking Tool page.*

5	A hotel matrix displays.
3	Click **Show Details** for a specific hotel to view more detailed information.
4	Click **Choose Room** to view rates and details about the rooms.
5	When ready to reserve your room, click the radio button to the left of the rate, and then click the green **Reserve** button.

Note: *Reservations within Statewide Travel Policy guidelines will display a green reserve button, those outside policy a gold reserve button. You can book out of policy, but will need to explain why in the reservation process. A red button will not allow you to book the flight without approval. This is Audited by the State.*

6	Review the pop up for rates, dates and cancellation policy. Click the acceptance box to acknowledge acceptance and then click **Continue**.
7	Enter Credit Card Payment information and then **Reserve Hotel.**

Step 2: Preview Itinerary

1	Review the reservation components in your Itinerary. Make any necessary changes or corrections.
2	Click **Next.**

Step 3: Trip Booking Information

1	Enter a name for your trip in **Trip Name** (include travel dates in name) and optionally add any additional information in the **Description** field.
2	You can send a copy of the itinerary to another person from here.
3	Click **Next** to continue or click **Previous** to make changes.

Step 4: Trip Confirmation

1	Verify information such as travel dates, rates, cancellation policy.
2	Click **Previous** to make changes or **Confirm Booking** to complete the reservation.

Section 10: Cancel or Change Airline, Car Rental, or Hotel Reservations

Note: *Flight changes are available for e-tickets with a single carrier. You can change the time or date of a ticketed flight that has not yet occurred with the same airline and routing.*

Direct contact with the State TMC Travel Consultant to book reservations may incur additional charges.

1	Select your trip from the **Upcoming Trips** tab in **Travel** or **Trip List** in **My Concur.**
2	Click the name of the trip to display options for this trip.
3	On the drop down menu, click the appropriate link to: • View Itinerary • Email Itinerary • View Request (see all data pertaining to trip selections) • Create Template (make it easier to book the same trip regularly) • Clone Trip (make it possible to book the same trip for others you make arrangements for) • Share Trip (share trip information with a colleague) • Change Trip (make minor modifications to trip) • Cancel Trip (completely cancel a trip)
4	Follow prompts depending on action chosen.

Policy Note: Air c*ancellations, Voids and Exchanges – see Travel Policy.*

Note: *If you completely cancel a reservation there is still going to be an agency booking fee that needs to be expensed. You can import this paid expense to your next expense report.*

Section 11: Create a New Expense Report

DO NOT combine in-state, out-of-state and international travel expenses. All required fields have red bars.

Step 1: Create the report

1	In the **Expense Reports** (may be labeled **Active Work** for your agency**)** section of ***My Concur***, click **New Expense Report**.
2	The current system date defaults in the **Report** Date field.
3	In the **Report Name** field, enter a name for the expense report. Include the travel dates in the Report Name. (i.e. Banking Conference 0612 to 0618)
4	Click on the arrow in the **Trip Type** field and select the appropriate trip type: In-State Travel, International Travel or Out Of State travel from the drop down menu.
5	Click on the calendar icon in the **Trip State Date** field, click on trip start date.
6	Click on the calendar icon in the **Trip End Date** field, click on trip end date.
7	In the **Purpose of Trip** field, enter the business purpose for the expense report.
8	Enter any necessary comments in the **Comments** box.

Step 1b: Attach Approved Travel Request (if required by agency)

1	If your agency uses Pre-Trip Travel Requests, you must link the approved Request to the Expense Report. Click on **Add** in the Travel Request section. If not, go to #1C.
2	Select the applicable Travel Request from the list and click **Add**.

Step 1c: Complete Report Creation (Required by all agencies)

1	Click **Next**.

Step 2: Enter Any Travel Allowance (Meals Per Diem)

1	A **Travel Allowance** window opens: Will this report include Travel Allowance Expense? Select **Yes** if Meals Per Diem applies to this trip or No if you prefer to enter them later.

Note: *For overnight trips begin here. For Single day trips go to #3b.*

3	Move scroll bar to top of New Itinerary box. If this is a multiple day trip you should be using **Standard Itinerary**. Enter departure city in **Depart From** and enter your departure time in **Time** (i.e. 6:30 am). **Note:** To enter Single Day Per Diem see **Single Day Itineraries** at #3b
4	Enter your destination city for the first day in **Arrival** and enter your arrival time in **Time.** Click **Save.** This builds the first leg of your trip.
5	Now you enter the final leg of your trip. The departure city will default to your last stop. If this isn't correct, enter the city where you spent the night in **Departure**. Enter the time you left in **Time**.

Note: *Entering departure and arrival times is used to calculate eligibility for Per Diem.*

6	Enter your arrival destination for the last day of travel which is likely home in **Arrival**. Enter the time you arrived in **Time**. Click **Save.**
7	Click **Next**
8	Click **Next** again
9	Click **Create Expenses**

Note*: For Single Day Per Diem-No Overnight begin here.*

3b	**Single Day Trips:** Select **Go To Single Day Itineraries** at the bottom of the

	window if the Single Day Entry does not appear.
4b	Enter a start date **in choose start date** and press **Go.**
5b	In **Start Location** next to the correct date enter your starting point for the day trip and enter the time you left in **Depart**.
6b	Enter the last business stop of the day in **End Location.** You must choose a city with **(Single Day**) in the name**.** Enter the time you arrived in **Arrive**. ***Note****: Don't be concerned with stops in between. This only determines eligibility for Per Diem Meals.*
7b	In the next **Depart** field enter the time you left your last business stop and in the **Back** field enter the time you arrived home. Press **Tab** to display the total hours calculation.
8b	When you have completed entering your Itineraries for this date range in Travel Allowance click on **Save Itineraries**. *See policy note*.
9b	Click **Next**
10b	Click **Next** again
11b	Click **Create Expenses**

Policy Note: *On day of departure /return, Travel Allowance is calculated at 100% of Per Diem rate for Single Day Per Diem and 75% for 1st and last day of travel on Multiple Day Per Diem. Rates are based on the last business location of the travel day.*

Single Day Per Diem : Return Day – rate based on your last business travel location of the day.

Multiple Per Diem Days: Departure Day – Rate is based on your last business stop of the day; Return Home Day – based on last business stop of the day.

Travel Allowances for a single day where travel exceeds 50 miles from the home/office location and continuous travel is 12 hours or greater are calculated at 100% of Per Diem based on last business stop location. You MUST choose a final business destination that has (Single Day) in the name!

Travel Policy Note: *Effective 7/1/13 incidental expenses are no longer included in Out of State Per Diem.*

Step 3: Add out-of-pocket expenses to the new expense report; Required fields have red bars

1	On the **New Expense** tab to the right, search or scroll to locate the appropriate expense type and click on it.
2	Click on the calendar icon in the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3	The purpose of the trip is populated from entering Step 1, Section 7.
4	Enter the merchant name for the expense in **Vendor Name** (i.e. Staples, FedEx)
5	Start entering the name of the city where the merchant was located in the **City** field. When the correct city and state (or country) appears select it

Note: *This field acts like a search field. To restrict the search to the US click the arrow next to "all countries" and select United States.*

6	Verify the **Payment Type** is correct. Click the arrow in the **Payment Type** field to choose from Out of Pocket or Company Paid
7	In the **Amount** field, enter the amount spent on the expense.
8	If you emailed, uploaded or faxed your receipt to Concur, click **Receipt Store** and drag the receipt to attach it to the expense item.

Note: *Click the* ***Personal Expense*** *box for any personal and non-reimbursable items on the receipt See Travel Policy for Miscellaneous expenses-reimbursable and non-reimbursable*

9	Click **Save.**

Note: *If your Agency uses Travel Advances please see Section 12 Using Special Features Attach Travel Advances to an Expense Report, Attach Travel Advance that exceeds actual Expense Report Total*

Section 12: Importing Company Credit Card Transactions into an Existing Expense Report

1	Open the Expense Report
2	Click on **Import**
3	The **Smart Expenses** window opens.
4	Click the check box next to the Company Paid charges you want to add to the Expense Report.
5	Click on **Import.**
6	If prompted, select the "**To Current Report**" option.
7	The expenses are imported to the Expense Report and are visible on the left side of the open Expense Report.

Section 13: Review or Edit an Expense Report

1	In the **Expense Reports** (may be labeled **Active Work** for your agency**)** section of ***My Concur***, click the name of the report that you want to review to open it.

2	Select the expense item you want to correct make the change and **Save** enter a new expense and **Save** or delete an incorrect entry.
3	To correct details for the overall Expense Report (such as reporting dates, etc.), select the **Details** Tab, then select **Report Header** from the dropdown menu. Make any changes and **Save**.
4	Click **Save**.

Section 14: Using Expense Special Features

Add Personal Car Mileage

1	On the **New Expense** tab, select Personal Car Mileage from the **New Expense** list.
2	Click the **Transaction Date** field and enter the date you drove this mileage.
3	Leave the **From Location** and the **To Location** fields, blank. These fields will update from **Calculate Mileage**.
4	Verify the **Trip Type** from the Report Header.
5	Select the appropriate personal car in the **Vehicle ID** field; generally Personal Car-Tier I or Personal Car – Tier II
6	Click on the **Mileage Calculator** icon. Enter <u>**all**</u> the waypoints for your trip that day – start to last travel location.

Note: *When entering a single day of a multi-day trip start may be where you left from that travel day and end where you spent the night that travel day.*

Note: *You can enter a city and state without an address. The system will calculate mileage to the center of the location. Adjust mileage on the actual expense if needed. See note at end of this section on mileage differences.*

7	Enter the final destination of the day or click **Make Round Trip** to show final destination the same as the starting destination.
8	Click the box **Deduct Commute** to deduct a one way commute.

Note: *The first time you enter Personal Car Mileage you will enter your home and office address in the Deduct Commute box. You only have to enter home and office data once.*

9	To make this a round trip commute deduction, click **Deduct Round Trip**.
10	Click **Add Mileage To Expense** to update the expense report.

Note: *If your actual mileage was different than the calculated mileage due to detours, locations with no address, etc., add this mileage to the calculated distance in the expense amount box and <u>make a note in the comments box.</u> Failure to enter an explanation may result in your expense report being rejected.*

Allocate Expenses

New Allocation

1	Complete all expenses as usual.
2	Click **Details** tab and select **Allocations** from the dropdown list.
3	Select the expense(s) you wish to allocate from the Expense List. You may choose multiple or all the expense items.
4	In the upper right hand corner of the window, click **Allocate Selected Expenses**.
5	In the **Allocate By** field, enter the appropriate **Percentage** or **Amount**.
	The coding information that appears on the line displayed is your default from the HCM system.

Note: *To use an existing saved **Favorites** allocation go to Step 9b.*

6	Click **Add New Allocation** to add a new line. You may adjust the amount or percentage to suit your needs.
7	Click in the fields requiring the coding adjustment (**Department, Program, Fund Source, etc**) and then make the necessary adjustments. You may use the lookup or enter the information if you know it. *Add new allocations as necessary. Default information is in the first row of the allocations.*
8	Click **Add New Allocation**, and then repeat steps 6-7 for each new allocation. *Note that there is a running total of how much remains to be allocated to the right of the window title (Allocations).*
9	To save this allocation to reuse again click on the **Add to Favorites** tab
10	Enter a name for the Allocation in the **Add To Favorites** dialogue box that opens.
11	Click **Save**
12	Click **Save** again, click **OK**
13	In the **Allocate Report** window, click **Done**.

To used a saved Allocation to allocate expenses

9b	Click on the **Favorites** Tab
10b	Select the appropriate saved Allocation from the drop down list.

11c	Click **Yes** in the **Confirmation** dialogue box that opens.
12c	Click **Save**, and then click **OK**.
13c	I In the **Allocate Report** window, click **Done**.
Convert Foreign Currency Transactions	
1	Click **New Expense**
2	On the **New Expense** tab select the appropriate expense type.
3	Complete all required fields as usual *except* **Amount**.
4	In the **Amount** field, enter the amount spent on the expense.
5	Select the "spend" currency from the dropdown list to the right of the **Amount** field.
6	Click the appropriate mathematical symbol (multiply or divide) to change the conversion format, if required.
Note: *You can override the currency conversion rate to match the rate on your receipt by entering the correct data*	
7	Click **Save**
Itemize Nightly Lodging Expenses	
Step 1: Itemize nightly lodging expenses	
1	For a new item on **New Expense** tab select the **Hotel** expense type OR For an item imported into the expense Report from a Completed Trip Itinerary click on the Hotel expense item to be itemized.
2	Click on the **Transaction Date** field and use the calendar to add or correct the date of the transaction (invoice date.
3	Verify or select the vendor from the Vendor dropdown list.
4	Enter location of hotel in **City**. (i.e. Moultrie, GA)
5	Verify the **Payment Type**.
6	In the **Amount** field, enter the **total** amount on the hotel receipt.
7	Click **Itemize**.
8	The Check Out date should be filled in from the 1st entry screen. You can change it here.
9	Enter the **Check-in Date** from the receipt. The number of nights field will update from the dates entered.
10	In the **Room Rate** field, enter the amount you were charged per night for the room only.
11	In the **Room Tax** fields, enter the amount of each room tax that you were charged.
Note: *For In State lodging only any Occupancy Tax is NOT entered in Taxes,*	
12	Go to **Additional Nightly Charges** and from the drop down menu in **Expense Type** select **Occupancy Tax** (in the **Lodging** section) and enter the daily amount of the Occupancy Tax in the amount field.
13	Any **Additional Charges** (Daily recurring charges) are added in the next available field. From the **Expense Type** drop down menu, select the appropriate expense type.
14	In the **Amoun**t field, enter the amount of the epense.
15	Click **Save Itemizations**.
Step 2: Add any remaining lodging itemizations	
1	If the **Amount Remaining** displayed at the top of the **Expense** tab on the right is more than zero, you have amounts not itemized. You may have a few expenses that were charged but were not nightly charges to enter this way.
2	Click the **Expense Type** dropdown arrow, and then select the appropriate expense from the dropdown list.
3	Enter the amount of the expense in the **Amount** field. Check the **Personal Expense** box if this is a personal non-reimbursable expense on the receipt.
4	Click **Save.**
5	Repeat steps 1-4 until the **Remaining Amount** equals $0.00
Attach Cash Advances to an Expense Report	
Note: Not all Agencies offer Cash Advances.	
1	Open the Expense Report, click on the **Details** tab and under ***Cash Advances*** heading on the menu, select **Available**
2	Click the box(es) next to the Cash Advance applicable to this Expense Report. Multiple Cash Advances can be applied.
3	Click **Assign Cash Advance to Report**.

Note: *The Cash Advance does not appear in expenses at this point. To view, click* ***Details*** *tab and select* ***Assigned*** *under* ***Cash Advances*** *to display, and view any amount due.*

Note: *Please read the Statewide Travel Advance Policy – OPB. A link to this OPB Policy is on the SAO website*

Account for a Cash Advance that Exceeds Actual Expenses Reported.	
1	After assigning the Cash Advance to the Expense Report the **Cash Advance Return** expense item appears in the Expense Types list on the New Expense tab. Select Cash Advance Return.
2	A grid appears displaying the amount of the Cash Advance and the amount due back to the State.
3	Enter the date you returned the unused portion to your Agency in the **Transaction Date** field and the amount returned in the **Amount** field.
4	Attach any documentation for the return of the unused portion utilizing the Attach Receipt button or fro Receipt Store.
5	Click **Save.**

Note: *Please read the Statewide Travel Advance Policy – OPB. A link to this OPB Policy is on the SAO website.*

Detach Cash Advance from an Expense Report	
1	Open the Expense Report
2	Click on the **Details** tab and under ***Cash Advances*** select **Assigned**.
3	Click the box next to the Cash Advance to be detached and click **Remove From Report.** **Note:** *This <u>does not</u> delete the Advance, just removes it from association with this Expense Report.*

Add Attendees to Group Meals	
1	On the **New Expense** tab, select the Group Meals expense.
2	Click the **Transaction Date** field, and then enter the date (mm-dd-yyyy) or use the calendar icon to select the date of the transaction.
3	The Purpose of Trip field should be populated.
4	Enter the merchant name on the receipt into the **Vendor** field. Verify the **City** field is correct.
5	In the **Amount** field, enter the amount of the expense.
6	Scroll down to the **Attendees** Section.
7	To add a new attendee, click the » icon and select **New Attendee**. Complete the required fields, and then click **Save** or **Save & Add Another.** –OR- Click **Favorites,** select the attendees for this expense, and then click **Add to Expense.** -OR- Click the **Search** button. Enter your search criteria, select the attendee. Click **Add to Expense.**
8	Click **Save**.

Copy a Single Expense	
1	On the Expense Report page, from the **Expense List**, select the checkbox next to the expense you wish to copy.
2	Click **Copy**
3	Click on the new expense.
4	Make all the necessary changes to the new expense. The date will increment one day from the item you copied.
5	Click **Save**.

Copy an Expense Report	
Note: *If you have repetitive travel, or repeat a previous trip this can save you time. For some TTE users this will not be a viable tool.*	
1	Click on the **Expense** tab.
2	Select **View Reports**
3	Click the check box next to the Expense Report you wish to copy.
4	Click **Copy Report**,
5	Enter a name for the new Expense Report. **Note:** *The old name will be displayed but will be overwritten with the new name.*
6	Enter the earliest date you will be entering expenses for on the new Expense Report in the **Starting Date for Expense Entries on the New Report** field.
7	Click **OK.**

Note: *Some expenses will NOT copy – such as Travel Allowances, Travel Requests, Cash Advances and receipts. You will see a brief message indicating whether all expenses copied or not.*

8	The new Expense Report opens.
9	Click on the **Details** tab and select the **Report Header**.
10	Correct the **Trip Start Date** and T**rip End Date**.
11	Correct any other fields in the **Report Header** that need adjustment.
12	Attach any approved **Requests** needed.
13	Click **Save**
14	The new Expense Report opens.
15	Add any Travel Allowances by clicking on the **Details** Tab and selecting **New Itinerary** and enter as usual. See Section 9, Step 2 of this document for details.
16	Look at the details on all expenses that copied. Make any corrections necessary. For example, dates, adjust the stops on personal car mileage, dates on hotel stays, etc.
17	Attach any receipts necessary. See Section 15: Attaching Receipts.
18	Attach and account for any applicable Cash Advances. See **Attach Cash Advances** section above in this Section.

Itemize Expenses

1	On the **Expense Report** page, click the expense item you want to itemize (use multiple expense codes for same item)
2	Click **Itemize.**
3	On the **New Itemization** tab, click the **Expense Type** dropdown arrow and select the appropriate expense from the dropdown list.
4	Complete all the required and optional fields such as **Vendor**, **Transaction Date** and **Amount**.
5	Click **Save**.
6	Repeat steps 3-5 until the **Remaining Amount** equals $0.00.

Section 15: Attaching Receipts

Fax receipts

1	Open the Expense Report you want to fax receipts for.
2	Click the **Print/Email** tab and select ***SOG Fax Receipt Cover Page.**
3	Click **Print**.
4	Fax the printed cover page and receipts to the fax number on the page. **Note:** *The Fax Cover page cannot be used for other expense reports. The bar code generated is exclusively for the Expense Report that generated the Cover Page. Complete instructions and the Fax Number are on the page. Allow 10-15 minutes for the receipts to process.*
5	To verify the receipts were successfully attached, click the **Receipts** tab and select **Check Receipts**.

Attach scanned images of receipts

1	On the **Expense Report** page, from the **Receipts** dropdown menu, select **Attach Receipt Images**.
2	Click **Browse**. Locate the files you want to attach.

Note: *Recommended that you create a folder on your PC to store your scanned receipts so you can easily locate them.*

3	Click the file, and then click on **Open.**
4	Repeat Step 2-3 for each file you want to attach..
5	Click **Close** when finished
6	To view the attached receipts, click on the **Receipts** tab and select **View Receipts.**

Note: *You can add multiple expense images to a single expense item. Each one is added separately using the Attach button. The system will ask if you want to append the image, say Yes.*

Attach Line Item Receipts from Receipt Store

1	Click on **Receipt Store.**
2	Click on the appropriate receipt and drag it to the expense item you wish to attach it to and drop it.
3	Repeat Step 2 to add additional receipts to the same expense entry or to add receipts to other expense entries.

Manually Upload Receipts to Receipt Store

1	Click on the **Expense** tab and select **View Receipt Store**. **Note:** *No Expense Report needs to be open*
2	Click on **Upload**
3	Click on **Browse**
4	Locate the receipt image file you wish to attach and click **Open**.
5	Click **Upload**.
6	Repeat steps 2-5 for each receipt image you want to add.
7	When done, click **Close**. The receipts are available for use on any Expense Report. When you drag a

	receipt from Receipt Store to an Expense Item, the file no longer appears in Receipt Store. You can upload receipts anytime **Receipt Store** is open, whether inside an Expense Report or not.

Email Receipts to Receipt Store

1	Verify your email address in Profile if you have not already done so.
2	Send the receipt (one at a time) via email to receipts@concur.com.
3	The receipts will appear in **Receipt Store** available for use. Please refer to the Receipt Store Set Up Manual for more details.

Delete a receipt image from a single expense item

1	Open the Expense Report,
2	Hover over the green receipt icon to display the attached receipt images for that item. Click on **Detach From Entry**.
3	Click **Yes** in the confirmation box.
4	The image is detached. **Note**: *Items with multiple receipt images attached will act as one image with multiple pages. Deleting will delete all the images attached to the item. You can add back any receipt images you do want attached.*

Delete ALL attached receipt images from an Expense Report

1	Open the Expense Report, click on the **Receipts** tab and select **Delete Receipt Images.**
2	Click **Yes** in the confirmation window.

Note: *Do not try to delete <u>individual</u> attached receipt images from here.*

Deleting will delete ALL attached images. Detach an individual receipt from the expense entry line.

Section 16: Print, Submit or Recall Expense Reports

To print a hard copy of your Expense Report

1	Open the Expense Report
2	Click the **Print/Email** tab and select ***SOG Detail Report.**
3	Click **Print** to create a hard copy if desired.

Policy Note: *Expense reports are to be submitted within 45 days of travel completion but it is recommended submitting within 10 days of your trip close.*

Note: *Reimbursements should be in the traveler's account, if on ACH, within 3 days after the expense report has been approved for payment by the Back Office.*

To Submit an Expense Report

1	Open the Expense Report
2	In the upper right of the Expense Report page, click **Submit Report**.
3	In the **Final Review** dialogue box, click **Accept and Submit Report.**
4	In the **Report Submit Status** window, click **Close**.

Correct and resubmit an Expense Report sent back by an approver

1	Open the Expense Report from **Expenses/View Expense Reports** or from **My Concur Active Reports**
2	Make the necessary corrections.
3	Click **Save.**
4	Click **Submit Report**
5	In the **Final Review** dialogue box, click **Accept and Submit Report.**
6	In the **Report Submit Status** window, click **Close**.

Recall a Submitted and Unapproved Expense Report

1	Open the Expense Report from **Expenses/View Expense Reports** or from **My Concur Active Reports**
2	Click on the **Recall** tab.
3	The Expense Report is removed from your Approver's queue. You can make any changes and submit the report when done.

Section 17: Request Cash Advance

Note: *If your agency does not allow Travel (Cash) Advances it will not appear under the Expense tab. If you need the Cash Advance in less than a week, so not process through TTE.*

1	At the top of the **My Concur** page, click **Expense.**
2	Click **New Cash Advance.**
3	Enter a meaningful name for the Cash Advance in the **Cash Advance Request Name** field.
4	Enter the required amount in the **Amount** field.
5	Use the **Comment** field to provide any additional information to the Cash Advance Approver.
6	Click Submit at the bottom right of the entry window.
7	You can monitor the status of the Cash Advance Request from the My Concur home page.

Section 18: Create Request (Travel Authorization)

Note: *If your Agency does not require Pre-Trip Approval through TTE, it will not appear as a tab in TTE.*

Create Request

1	In the **Active Work** section of the ***My Concur*** homepage**,** click on **Request.**
2	Click **New Request.**
3	Enter a meaningful name for the Request in **Request Name**. Include the travel dates in the name. (i.e. Banking Conference 0612 to 0618)
4	Enter **Start Date**, **End Date** and **Purpose** for the travel.
5	Click **Save**
7	Click the **Air**, **Car, Hotel, Meals** or **Misc** icon to enter estimated costs for each segment of the anticipated travel.
8	Enter an <u>estimated dollar amount</u> of the travel cost for the segment you are entering. For air, you will need to select Round Trip, One way or Multi-Segment. Any required fields are indicated by a red bar.

Note: *Do not combine requests in one icon. Select each icon type and enter estimated amounts for each expense type.*

9	Click **Save** after completing each segment (Air, Car, Hotel, etc.)

Note: *You cannot change or delete a Request once you submit it for approval unless the approver returns it to you for change.*

10	Click **Submit Request** to forward for Approval.

Modify Request Returned by Approver

1	On the ***My Concur*** page, select the **Request** tab from the **Active Work** section.
2	Select the **Request** that has been returned by an Approver. The return is indicated in the Status field as well as with an orange icon
3	Make any necessary changes requested by the approver in the Comments. You can change header or segment information.
4	Click on the **Segments** tab to update segment information.. Scroll through the entries. You will see a **Modify** and **Delete** button for each segment. **Modify** allows you to change a segment and **Delete** allows you to delete a segment. You can also add a new segment, by clicking on one of the segment icons (Air, Car, Hotel, etc.)
5	Click **Submit Travel Request** to resubmit the request with the required changes.

The following Sections are for Approvers Only. If you are not an approver, you will not be able to access these queues with your login.

APPROVERS

Section 19: Review & Approve Expense Reports, Requests or Cash Advances.

Please see the **Approver's Handbook** available in the Reference Manuals section of the **TeamWorks Travel and Expense Training** page of the SAO website.