Entering a Request with Screenshots
Search Travel for Estimates Only!

Use Travel tab to research cost of Air, Hotel and Car Rental for your estimates for your Request. Select the appropriate icon for the travel segment you’re seeking a travel estimate for. Fill in your search criteria for departure and arrival city, and departure and return date/time. Click on Search. Write down the lowest rate for travel segment meeting your requirements. Click on the Travel tab again, then appropriate travel icon to search another travel segment, if needed.

Trip Search-Click Travel Tab to get air and hotel estimates; (Check each item separately)

1. Click Travel tab-Select Airplane icon-Enter Airline Information
2. Click Search – Estimate for Air $____________
3. Click Travel tab again
4. Click Hotel Bed
5. Click Search- Estimate for Hotel $___________

* Hotel estimate should include room rate and taxes times the number of nights.

*Check the prices of baggage fees for the airline you have chosen.
Click Requests tab on Concur toolbar. Click New Request. **Complete all Required Fields, designated with a red bar, including:**

1. **Request Name:** Format Request name as follows: Trip Location & Dates of travel; Example: SMF 4/4-4/6/16.
2. Select appropriate **Purpose** from drop down menu.
3. Select appropriate **Travel Group** from drop down menu. If using COE funds to pay for travel, employee must select COE travel group. Travel group selected determines budget paying for travel, i.e COE travel group paid by COE, or professional-faculty/staff travel paid by departmental budget.
4. **Index**-select COE index when using COE travel group; otherwise, if professional-faculty/staff, index will auto-populate with default org.
5. Use **Comment** section to indicate sharing a room, driving with another employee, name of conference or No Registration. Also, enter who will cover any amount over the budgeted amount (COE)? (Personal or Department)
6. **For registration payment or reimbursement** enter the dollar amount into the Cash Advance amount and complete Cash Advance Comment section with dollar amount and what the cash advance is for (Registration). Professional Leave and Travel can only do a cash advance for Registration.
Click Segments tab. Complete Required fields. Have your estimates available. Your hotel estimate is the room rate and taxes times the number of nights. When renting a vehicle is necessary, complete the comment field with justification for renting a vehicle.

If you are booking air and already have a confirmation number or want the travel agent to book the conference rate, DO NOT ENTER INTO SEGMENTS. Enter hotel information into an Expense. When you Book your travel, enter under Comments to agent the confirmation # and hotel information or conference rate, enter conference name, hotel and conference rate.

If there is no air, select hotel segment. When you receive the Book button choose the hotel you would like to stay at. If the hotel is sold out, choose another hotel and enter Comments to the Agent. If you have confirmation number along with name of hotel or enter the information of the hotel you would like the travel agent to book with conference rate information.
Click the Expenses tab. If a cash advance for Registration was entered on the Request Header complete the required fields on the Expense.

- **Select Payee.** If Payee is not listed in drop down menu, email acctspayconcur@collin.edu and include registration form with information on vendor. Allow a couple days to get the vendor set up in Concur. If employee has already paid the registration on-line, attach proof of payment and select *Employee as the Payee to get reimbursement. Proof of payment will need attached to the Request.

- **Place check mark in Apply to Cash Advance box. REQUIRED.**
- **Click Save.**
Click Mileage Expense if driving by car. Complete required fields. Estimate the miles and enter. Use mileage chart on the Concur Home Page or CougarTravel How to page to obtain an estimate of travel miles for cities within Texas. Concur will calculate the total Transaction Amount based on mileage and rate.

Click Save.
Enter required fields for Travel Allowance (Meals per Diem). This is an estimate only. Traveling within the state of Texas is $46/day. Traveling outside of Texas is $71/day. If you need the exact amount for per diem, go to Cougar Travel. Click on How To, click on GSA rates, type in the city and state.

Click save.
Click on New Expense to add any other expenses you anticipate incurring while traveling.

Click Save.

Use the comment section for things such as driving together or sharing a hotel.
Click on the Attachment tab to add attachments. Attach the Agenda, completed Registration form, receipt for paid registration (if applicable).

You may need to attach other documentation requested by your dean and a Justification for COE travel (if applicable). Other items that may need to be attached Training agreement over $1000 orFlying vs driving outside of Texas.

Review and Submit.