1) Concur Home Page
   a) Company Notes
   b) CougarTravel

2) Demonstration – Search Travel & Enter New Request

3) Class Exercise – Hands on Activity
   a) Get travel estimates
   b) Create Travel Request
      i) Request Header tab
      ii) Segment tab
      iii) Expense tab

4) Demonstration – Travel (Book Button)

5) Expense Report Training Dates

6) Approver Training Dates

7) Canceling a trip
Concur Home Page

- Select Concur tab to access the homepage.
- Complete employee profile information.
- Access CougarTravel from homepage under Company Notes or directly by going to www.collin.edu/aboutus/travel.
- Current travel information will be posted to Company Notes page.
- Expanding the Company Notes section by clicking “Read more” reveals additional PDF fillable forms.
Travel Request Demo

1. Get estimates for travel expenses

   Obtain estimates by putting in the trip search criteria including departure/arrival city, dates, and times. Select search. Note the flight and fare that meets your travel needs. DO NOT SELECT ANY FARES AT THIS TIME...YOU’RE ONLY GETTING AN ESTIMATE. Repeat for hotel and rental car (if applicable).
3. Create a New Request

4. Complete the Request Header
   - Request Name format should be: Destination, dates of travel
   - Select the appropriate travel group depending on who will be paying for travel
   - Complete both Cash Advance and Cash Advance Comment fields for prepaid registration

5. Complete the Segment tab with estimates received from travel search. Provide justification for rental car.
   - Select the travel icon you wish to complete.
   - Note the travel request #; in this case it’s 3469. You will need this when booking travel.

6. Complete the Expense tab with all expenses.
• All segment expenses (air, hotel, car rental) will automatically populate on the expense tab. Any segment expense corrections that may need to be made must be modified/edited on the Segment tab.

• When requesting a cash advance for registration, remember to include registration on the expense tab. Select payee from drop down menu. Payee field MUST be completed and the Apply to Cash Advance box must be checked.

Other expense categories to include in estimated expenses are parking, travel allowance (per diem), mileage, taxi, etc. Remember, this is an estimate...
Search Travel and Enter Request

1. Concur Home Page
   a. 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 $

2. Click Request
   a. Click Create New-New Request
      1. Complete Required fields denoted with red bar in Request Header in this format:
         Austin 5/4-5/6
      2. Complete Cash Advance amount for Registration
      3. Complete Cash Advance Comment section. (1) Dollar amount of conference and
         (2) expense type, i.e. Registration. This is required when requesting cash advance.
      4. Click Save

3. Segments (Segments Tab)
   a. Click Airplane.
   b. Complete required fields. Use your air estimate from 1.a.1. above.
   c. Click Save.
   d. Click Hotel Bed
   e. Complete the fields for your hotel stay. Use your hotel estimate from 1.a.5. above.
   f. Click Save

4. Click the Expenses Summary Tab (next to the segment tab, under Request)
   a. Click New Expense- Registration
      1. Complete the Required fields.
      2. Check the cash advance box. This is required for cash advance (prepayment
         for registration).
      3. Enter the Payee for the Registration.
      4. Save

5. Click New Expense for any other Expenses needed for the trip.
6. Click on Attachments
   a. Attach Documents
      1. Agenda
      2. Completed Registration Form
      3. Justification if COE or your department requires Justification.

7. Submit Request Or Delete Request

Questions: send email to acctspayconcur@collin.edu. For demos and current travel procedures: www.collin.edu/aboutus/travel.
1. Concur Home Page
   a. Click Requests
   b. Write down Request ID # for Booking. (339G)
   c. Click Book button under Action

   ![Request Table]

   d. Click Proceed to booking.
   e. Click choose room.
   f. Check the cancelation policy before booking.
   g. Click Select
   h. Click check box that you agree to the rates and restrictions.
   i. Click Reserve Hotel and Continue.
   j. Click Next
   k. Comments for the Travel Agent: Enter conference rate information.
   l. Enter the Travel Request ID #. (Required field)
   m. Click on drop down menu: Do you have an unused ticket in your profile you would like to use, make correct selection. (Required field)

   ![Trip Booking Information]

   n. Click Next
   o. You may also have other segments (air, rental car, train) to book.
   p. Click Confirm Booking.

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Expense Report Instructions

1. Concur Home Page
2. Click Request
3. Click Expense under the Action column on the correct report.
4. Complete required fields. Request will be attached.
5. Click Next.
6. Complete information on Travel Allowance. There will normally be two segments, one for departure and one for return.
9. Click Next after itinerary is completed.
10. Click Next.
11. Check off meals that were provided at conference or meals not eligible for reimbursement based on times of departure and return. See Travel Allowance (Meals per diem) reimbursement chart.

12. Travel allowance

<table>
<thead>
<tr>
<th>Time</th>
<th>Departure</th>
<th>Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:01 am - 8:00 am</td>
<td>B, L, D</td>
<td>B</td>
</tr>
<tr>
<td>8:01 am - 5:00 pm</td>
<td>L, D</td>
<td>B, L</td>
</tr>
<tr>
<td>5:01 pm - Midnight</td>
<td>D</td>
<td>B, L, D</td>
</tr>
</tbody>
</table>

B= breakfast, L=lunch, D=dinner

13. Click Create Expenses.
c. Click Deduct Commute.
d. Click Deduct Round for Commute if traveling during the work week.
e. Click Add Mileage to Expense.

15. Demo Allocation
   a. Click Details.
   b. Click Allocations.
   c. Select Group
   d. Click Allocate Selected Expenses.
   e. Click Allocate By. (Percentage or Amount)
   f. Click Add New Allocation
   g. Click Save
   h. Click Done.
   i. Note Travel Allowance icon

16. Approval Flow
17. Audit Trail
14. Add Expenses such as Mileage. Concur will automatically navigate you to the Google mileage calculator.

15. Enter Destination
   a. Click Make Round Trip
   b. Calculate Route.
   c. Click Deduct Commute.
   d. Click Deduct Round for Commute if traveling during the work week.
   e. Click Add Mileage to Expense.

16. Demo Allocation
   a. Click Details.
   b. Click Allocations.
   c. Select Group
   d. Click Allocate Selected Expenses.
   e. Click Allocate By. (Percentage or Amount)
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