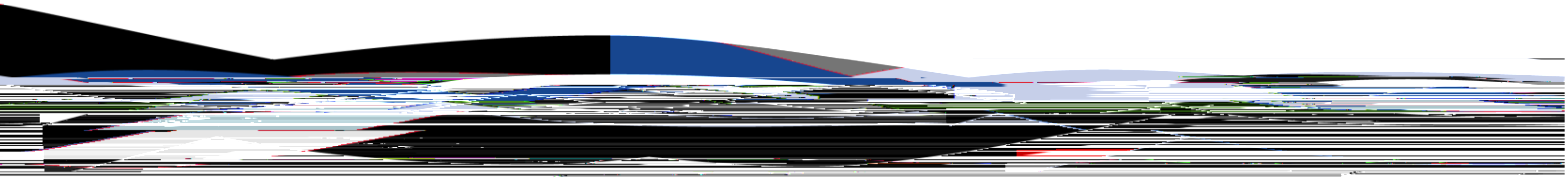

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Getting Started

Log on

1. Navigate to travel.smu.edu.
2. Click **Login**.
3. Enter your **SMU ID** and **Password.**
4. Click **Login**.

Before You Begin

First time users must Updated Profile settings before using Concur. Stand-alone instructions for one-time set up may be found at travel.smu.edu/training.

Requesting, Booking & Submitting Travel Expenses

Travel is divided into four sections. The instructions below outline these processes:

1. **Submit a Travel Request** (This step is required. Please note the request ID. This id is required to book travel.)
2. **Make a Travel Reservation**
3. **Create Expense Report**
4. **Review & Process Expense Report**

1. Submit a Travel Request

Note: All travel must be preapproved prior to making travel reservations or leaving for the trip.

1 From the **My Concur homepage** hover over **+ New**, select **Start a Request.**

2 The **Request Header** tab displays. Enter trip information.
Note: A red bar appears to the left of each required field.

Report Name Format:

Recommended format includes location and date: Austin TX 3-14-15.
Another option includes conference name and date: SCTEM 5-22-12.
No need to include your name, since you are doing this under your own account.

4 The Request may include **Attachments** and can be viewed in PDF and distributed via **Print/Email**

2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. In the **Amount**

4. Review and edit the Fund/Org Combination row as needed.
5. Click **Add New Allocation**, and then repeat steps 3-4 for each new allocation.
6. Click **Save**, and then click **OK**.
7. In the **Allocate Report** window, click **Done.**

Note: Allocations can be saved as favorites by selecting **Add to Favorites.**

Allocate multiple expenses:

1. Check the expenses you wish to allocate**.**
2. From the multiple expenses list, select **Allocate the selected expenses.**
3. Repeat steps 2-7 as needed.

Business Meals: Add Attendees

1. Several event types require an attendee list for entertainment expenses. From the **New Expense** tab, select an **Entertainment**, **Business Meals**, or **Team/Group Meals** expense type.
2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. Fill out all other required fields for this expense type.
4. In the **Amount** field, enter the amount of the expense. (See the Table of Contents for information on itemizing expenses.)
5. ***Adding Attendees*:** To add a new attendee, click **New Attendee**. Complete the required fields, and then click **Save**.
6. To search for an attendee, click **Search**, enter your search criteria in the **Search Attendees** window, and then click **Add to Expense**.
7. To search for a favorite that was previously added, click **Favorites**.
8. On the **Favorites** tab in the **Search Attendees** window, select the attendees for this expense, and then click **Add to Expense**. Click **Save**.

   You can make Attendees favorites by clicking **Favorites.** Then, select **New Attendee.** Populate the required fields and click one of the **Save** options.

   To add attendee groups, check the desired attendees, click **Create Group**, enter the **Group Name** and click **Save. (Import)**
9. ***Importing Attendees:*** Click **Import**. The attendee import window will display. Right click the link provided and open up the excel template.
10. Select the appropriate menu option to save the template spreadsheet to your computer.
11. Once saved, populate the desired information on the **Attendee** tab.

    Note: In order for the spreadsheet to successfully upload the **Attendee Type** must be entered and should be populated with one of the following attendee type values. **(These must be entered exactly as shown.)**

    Guest
    Spouse/Partner
    Student
12. To upload your attendee information click **Browse**. Locate your spreadsheet and click **OK**. Click **Next**.
13. A preview of attendees to be imported will display. Click **Next.**
14. The results will display. Click **Done**.

7. In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
8. In the **Amount** field, enter the amount of the expense.
9. Repeat steps 7-8 using the second **Expense Type** field if you have more than one recurring additional charge.
10 Click **Save Itemizations**.
11 Complete all required fields.