New User Launch Guide

Purpose

This guide provides basic information for new users of the Defense Travel Modernization (DTM) Prototype, a commercial off-the-shelf, software-as-a-service solution, developed by SAP Concur. The DTM Prototype is an end-to-end travel and expense management system with an embedded travel management company (TMC), Carlson Wagonlit Travel (CWTSatoTravel). The DTM Prototype facilitates initiation and approval of travel requests, confirmation and ticketing of travel arrangements, completion and approval of expense reports, and supports split-disbursement.

Quick Links & Information

DoD TravelBot
https://www.defensetravel.dod.mil/travelbot

DTM Prototype
https://dodtravel.concursolutions.com

Additional DTM Information
https://www.defensetravel.dod.mil/site/dtmprototype.cfm

SAP Concur Technical Support & TMC Customer Support

1-844-308-6880

Press #1 for Concur Technical (7am-10pm ET)
Press #2 for TMC (24 hours/day)

First Time Login

1. Configure Browser Settings

SAP Concur works best with the latest version of Chrome. To configure your settings, open Chrome's Settings menu and scroll down to open the Advanced Settings options. Under the "Privacy and Security" settings, select "Site Settings."

- In the "Cookies" menu, add "concursolutions.com" to the list of allowed sites.
- In the "Popups and Redirects" menu, add "concursolutions.com" to the list of allowed sites.

See all SAP Concur supported *browsers*.

2. Access the Prototype

The DTM prototype functionality will be deployed in iterations. As the capabilities of the DTM Prototype are deployed, the types of trips that can be processed in DTM expands. Trips that do not meet the criteria will continue to be processed through the Defense Travel System (DTS). To help travelers determine which system to use, DoD has created "DoD Travel Bot," https://defensetravel.dod.mil/travelbot, a decision support tool that will ask a few short questions about the trip then direct users to either SAP Concur or DTS, based on the trip details. Travelers should use the TravelBot each time they need to book a new trip.

3. Set up Your Profile

When first logging into the prototype, you will be prompted to verify and/or update the following profile fields:

- **Your Information**
  - **Personal Information**
    - First, Middle, Last Name
    - Company Information – If an employee ID (the DoD ID number on the back of a CAC) is incorrect, notify your component coordinator immediately.
  - **Contact Information**
    - Work and Home phone
      - Concur Mobile Devices – *Take pictures of receipts on your smartphone by adding a personal device. A device must be added to utilize this feature.*

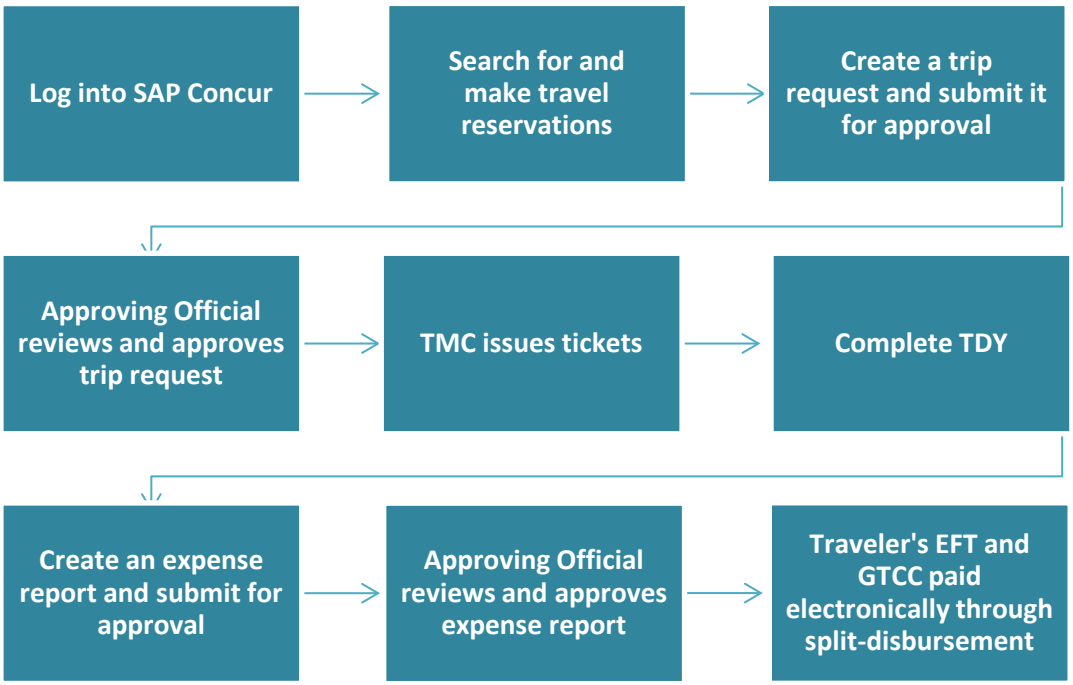
- Email addresses – Verify email address by clicking "verify" and entering the verification code received by email. *To receive e-receipts, the email address must be verified.*
- TSA Secure Flight – Known Traveler Number is the DoD ID number found on the back of your CAC.
- Credit Cards– Enter GTCC information

- **Travel Settings**
  - Travel Preferences
  - Frequent-Traveler Program
  - TSA Secure Flight – gender and date of birth

  SAVE before moving on to Request Settings
- **Request Settings**
  - Request Information – Confirm
    - Civilian/Military – Civilian or Military
    - Title/Rank
    - If Active Military, then Branch of Service
    - Verify your Request Approver
- **Expense Settings**
  - Verify Expense Approver
  - Personal Car – Enter a nickname and vehicle type for a personally owned vehicle. *To claim mileage in DTM, a car must be identified.*
- **Other Settings**
  - E-Receipt Activation – Activate e-receipts in profile settings under "E-receipt activation." *Ensure email addresses are verified.* With e-receipts activated, receipts will automatically attach to those expenses incurred from e-receipt enabled vendors. Look for "e-receipt enabled" when choosing lodging or rental car vendors to avoid errors and save time on the expense report. All airfare receipts are automatically attached to your airfare expenses regardless of e-receipt activation.

Did You Know? As a DoD service member or civilian, you qualify to get TSA Precheck for free! Works for TDY and leisure travel. Enter your DoD ID number found on the back of your CAC in the "Known Traveler Number (KTN)" field. Civilians must opt-in to the program before use. Find out how at www.defensetravel.dod.mil.

DTM Process for Booking and Expensing Travel



1. Log into SAP Concur. Use the Travelbot, https://www.defensetravel.dod.mil/travelbot, to determine if your trip can be booked using the DTMO Prototype or must be booked in DTS.

2. Search for and make travel reservations.

3. Create a trip request and submit it for approval. After making reservations, create and submit a trip request in SAP Concur. Complete each of the request tabs:
   - **Request Header:** click the "Request" tab
   - **Segments:** Ensure all reservations and airline seat assignments are correct (airline, rental car, hotel)
   - **Expenses:** Enter expense items for air, hotel, rental car and meals and incidental expenses (M&IE). For M&IE:
     - Ensure the City Name is correct (based on TDY location)
     - Enter M&IE expense items and allocate expenses

4. Approving Official reviews and approves the request. Approving officials may change the LOA on the request, if necessary.

5. The Travel Management Company issues ticket. View the status of reservations in SAP Concur or in reservation update emails from CWTSatoTravel. When the TMC issues a ticket, you will receive an email from CWTSatoTravel containing an invoice with a detailed trip itinerary and the cost of the airline ticket. **If you booked the airfare through the system, it automatically attaches the e-receipt to the airfare expense in the expense report!**

6. Complete travel.

7. Create an expense report and submit it for approval. SAP Concur uses trip request itineraries to automatically generate expense reports. Choose an itinerary/request to create an expense report for using the red underlined "Expense" link under the Travel tab on the homepage. Update the expense report with any additional valid expenses. Scan, or use uploaded receipt pictures from your smartphone under "available receipts" and attach them to all expenses $75 and above, and all lodging, regardless of amount. For expenses from e-receipt enabled vendors, the e-receipts are already attached to the expense. For detailed instructions on creating an expense report, visit the DTM Training page at: https://www.concursolutions.com/expense/client/view_training.asp.

8. Approving Official reviews and approves expense report. If changes to an expense report are required, the Approving Official returns the expense report. Otherwise, the report is approved. *Note: Multiple or supplemental expense reports may be submitted for a trip.*

9. Traveler's EFT and GTCC are paid electronically through split-disbursement. Electronic payment may take up to 5-10 business days.

User Feedback is Critical

Upon trip return, travelers receive two feedback questionnaires; SAP Concur sends a short electronic survey and DTMO also sends a link to a DTMO questionnaire. **Feedback about experience using this prototype is critical in making the DTM a success!**

Additional Resources

Defense Travel Modernization Prototype Information Sessions

Defense Travel Modernization Prototype Information Sessions provide a basic overview of the DTM Prototype, highlight useful features, and walk participants through demonstrations based on their role as a traveler, approving official, or travel manager. To learn how to participate, check with your organization's travel team.

SAP Concur User Guides and Demonstrations

A library of all SAP Concur basic user guides and video demonstrations is available. DoD authored several quick start guides and other supplements to augment the standard SAP Concur training products for travelers, approvers, and other travel managers. Access the library at https://www.concurtraining.com/en-us/pr/get-started.

For the most current version of this guide, go to: https://www.defensetravel.dod.mil/doc/DTMlaunchguide.cfm