

Specific Concur Instructions for 2012 PMI Forum:

You will need to complete this process in order to submit your PMI Forum expenses for reimbursement thru BDA/AFG or other means. Even if you are driving to the Forum this needs to be done so you can submit a T&E later. Please ask your office/complex administrator for help, they know this system.

1. Book your travel thru Concur. Write down the Record Locator you received as you pre-booked travel.
2. You will see a link to EREQ as you finish the travel booking. You are not ticketed yet, the EREQ function needs to be completed. Click the EREQ link.
3. Once in EREQ enter your Record Locator (PRN) from step 2.
4. The Requisition Information Screen will appear.
 - a. Under "Reason for Travel" select Training
 - b. "External Client Related" must be selected "NO"
 - c. In the blank "Job Number" field enter the following: 9GFATR [case-sensitive]
 - d. Click "SAVE".
5. You now need to incorporate PMI's Hotel Information for Forum.

6. DO NOT book your hotel thru Concur.

Book your hotel through the Westin Diplomat link here: <http://www.starwoodmeeting.com/Book/Portfoliomanagement2012> and reserve your nights for Forum using PMI's room block. Our negotiated room price is **LOWER** than Concur's pricing and applies from Tuesday night, April 17th thru Saturday night April 21st.

7. In the EREQ
 - a. Click "No Hotel Required"
 - b. Under "Reason" enter "Using PMI Hotel Block for Training"
 - c. Enter Address: Westin Diplomat, 3555 South Ocean Drive, Hollywood Florida 33019.
 - d. Click "SAVE".

Send the Requisition for Approval. Their name will be in the drop-down list. If you don't know who that is check with your branch/complex manager's assistant. Click "SEND FOR APPROVAL".

8. When your EREQ has been approved you will receive an email. **YOU NEED TO SUBMIT THE RECORD TO THE TRAVEL OFFICE SO YOUR RESERVATIONS CAN BE COMPLETED.** You may receive e-mails saying you have a "pending" EREQ in the interim.
9. You should be all set.
10. **Again, check with someone in your office or complex regarding specific EREQ and Concur questions. We are PM's just like you, we are merely providing this guide to assist you, but we are NOT Concur or EREQ experts.**
11. Thank you and see you at the Westin Diplomat!