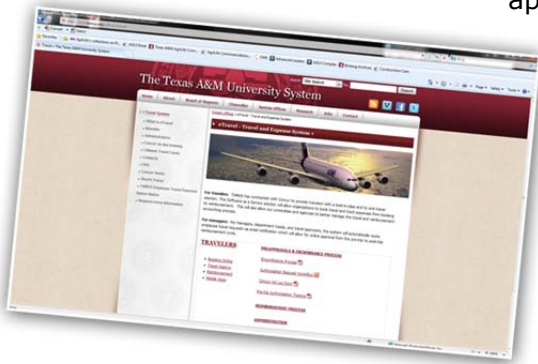


e-Travel/Concur: Beginning with the Basics

e-Travel/Concur

beginning with the basics

Background: In an effort to secure the best solution for end-to-end travel, The Texas A&M University System has contracted with Concur, which will allow personnel to have the ability to both book travel and track expenses from the booking to reimbursement phase electronically. Texas AgriLife Research, Texas AgriLife Extension Service, and Texas Veterinary Medical Diagnostic Laboratory have committed to implementing the Concur system for all travel processes, with a launch date of April 4, 2012. There's no doubt that the transition process will be challenging in its own right, but the ability to easily review, approve, and process the travel process electronically will provide for greater efficiency.



Currently, no test training site is available, as all testing is conducted in a live environment. Upon Texas A&M AgriLife's implementation of the Concur system, Administrative Services will work with all units in an effort to provide access to demonstrations, recorded sessions, and live training. Additionally, online training tools and help buttons are provided within Concur. The following fundamental references are provided as supplemental tools to training available on The Texas A&M University System Travel Web site:

<http://www.tamus.edu/offices/travel/concur-on-line-training/>

Don't forget to reference the Travel portion of the Administrative Services Web site for up-to-date communications regarding resources and implementation of the Concur system, as it pertains to our agencies:

<http://agriflifeas.tamu.edu/fiscal/travel/resources/index.php#concur-e-travel>.

Questions? Contact Shiao-Yen Ko <sko@ag.tamu.edu or 979.845.4778> or Kim Payne <kpayne@ag.tamu.edu or 979.845.4764>.

Quick Resources

beginning with the basics

[Setting Up a Traveler's Profile](#) | [Pre-Trip Authorization Requests](#) | [Pre-Trip Authorization Approvals](#)

[Booking Travel](#) | [Creating an Expense Report](#) | [Expense Report Authorization](#) | [Questions and Resources](#)

First Things First

setting up a traveler's profile

Upon first access to the new travel system, it is recommended that users setup their traveler profile. Complete the following steps to accomplish this task. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

<http://www.tamus.edu/assets/files/travel/pdf/CentraCap.pdf>.

Step	Process Actions
1	Login to Single Sign On, and select the Concur tab.
2	Select the "Profile" tab.
3	Select "Personal Information" under the "Your Information" header on the left-hand navigation. Verify pre-loaded content, and complete remaining requirements and preferences. This section will also allow you to designate travel assistants, and add credit cards. <i>Note: Required fields are distinguished.</i>
4	To setup expense delegates, select "Expense Delegates" under the "Expense Settings" header on the left-hand navigation.
5	To setup expense preferences, select "Expense Preferences" under the "Expense Settings" header on the left-hand navigation.
6	To customize additional user settings, select "System Settings" under the "Other Settings" header on the left-hand navigation.
7	To add mobile access via apps for iPhones, Blackberries, and Android devices, select "Mobile Registration" under the "Other Settings" header on the left-hand navigation.

Before your Trip

pre-trip authorization requests

Completion of travel authorization requests is recommended to ensure approval to travel is received. Requests for travel authorization are delegated to departments/units, and depending upon preferences may still continue to require paper authorizations. Contact your department regarding requirements for domestic travel. Please note that travel authorization requests are required for foreign travel. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

https://www.tamus.edu/assets/files/travel/pdf/domestic_ar_request.pdf (domestic travel); and

https://www.tamus.edu/assets/files/travel/pdf/Foreign_AuthoRequest.pdf (foreign travel).

Domestic Travel:

<i>Step</i>	<i>Process Actions</i>
1	Login to Single Sign On, and select the Concur tab.
2	Under the "Expense" tab, select "New Authorization Request," complete the request details, and then select "Save."
3	On the next screen, estimate your expenses for each of the four categories (lodging, meals, transportation, and other) by selecting each category, completing the details, and selecting "Save." If you are a delegate, at this point, you will need to notify the traveler of the authorization request they need to submit.
4	If you're a traveler, you may now submit this request to your approver by selecting "Submit Request." You will receive confirmation that the request was submitted successfully.

Foreign Travel:

<i>Step</i>	<i>Process Actions</i>
1	Login to Single Sign On, and select the Concur tab.
2	Visit the State Department Web site, linked in the "Travel Info" box to view the list of current travel warnings and verify if the country you are intending to travel to is on that list. Return to the Concur system.
3	Under the "Expense" tab, select "New Authorization Request," complete the request details, and then select "Save."
4	On the next screen, estimate your expenses for each of the four categories (lodging, meals, transportation, and other) by selecting each category, completing the details, and selecting "Save." If you are a delegate, at this point, you will need to notify the traveler of the authorization request they need to submit.
5	If you're a traveler, you may now submit this request to your approver by selecting "Submit Request." You will receive confirmation that the request was submitted successfully.

Before your Trip

pre-trip authorization approvals

Because travel authorizations are delegated to your department/unit, domestic pre-trip approvals may continue to require paper authorizations depending on the preferences of your department/unit. However, foreign travel authorization requests are required. Requests using the Concur system will be sent to approvers via email for pre-authorization. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

https://www.tamus.edu/assets/files/travel/pdf/ar_approval_requests.pdf.

Step	Process Actions
1	Login to Single Sign On, and select the Concur tab.
2	Scroll to the "Approval Queue," which is broken into "Expense Reports" and "Authorization Requests." Select the "Authorization Requests" tab to view the list of authorization requests needing approval.
3	Open an authorization request by selecting the title. Under the "Details" tab, select "Request Header" to view/update the request fields. Additionally, the approver can view/update the expense details by selecting the categories in the "Expense Category" tab.
4	The approver can then send the authorization request back to the employee with a note indicating why the pre-trip authorization is returned unapproved by selecting "Submit Back to Employee," or they can approve by selecting "Approve." Once the authorization has been approved, the approver will receive confirmation that the action has successfully been submitted. The pre-trip authorization request will no longer display in the "Approval Queue" once it has been approved.

Before your Trip

booking your travel

After obtaining pre-approval for your trip, you are ready to book the travel. Although travel is not required to be booked within the Concur system, you will still need to manually enter your expense report within Concur. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

https://www.tamus.edu/assets/files/travel/pdf/travel_booking.pdf.

Step	Process Actions
1	Login to Single Sign On, and select the Concur tab.
2	Select either the "My Concur" or "Travel" tab, which will bring you to the screen to complete the trip information.
3	Select your funding source, and then complete your travel details.
4	Select "Search" to view travel options. For extended flight options, such as seat selection, within a particular flight, select "Show Details." Select "Reserve" to book your flight. A confirmation screen will be provided; select "Save" to continue. <i>Note: Green boxes distinguish travel that is compliant with policy. If you select a travel option not within compliance, you will be asked to complete justification for your selection.</i>
5	The next screen will allow you to select your credit card. Select "Next" to proceed after confirming your credit card selection.
6	Rental car selections will be displayed on the proceeding screen. Contract vendors will be identified with green diamonds. Select "Reserve" to book your rental car. <i>Note: "E-Receipt Enabled" identifies that the vendor will automatically submit an e-receipt.</i>
7	The next screen will display hotel options. Contract vendors will be identified with green diamonds. Select "Choose Room" from the hotel you wish to stay at. Select your hotel room option, and then select "Reserve." A pop-up screen will then display terms and conditions. Select "I agree..." and then "Continue" or "Cancel" to select another option.
8	The next screen will allow you to select your credit card. Select "Next" to proceed after confirming your credit card selection.
9	Confirmation of your entire itinerary will display on the next screen. You may change your options by selecting the change link next to each component of your travel. Select "Next" to continue, or "Cancel" to discontinue booking of this travel.
10	The next screen will allow you to enter your trip booking information. Complete the details, and select "Next" to continue.
11	The following screen displays your trip confirmation. At this point, you will have one more chance to confirm or make changes to the itinerary. If all details are correct, select "Purchase Ticket." Your travel home page will then display your trip under the "Upcoming Trips" tab.

After your Trip

creating an expense report

After your trip, you will need to complete an expense report no matter if your travel was completed within the Concur system or not. Once you complete your expense report within Concur, the system will transmit information to FAMIS. It will not be necessary to enter information into FAMIS. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

<https://www.tamus.edu/assets/files/travel/pdf/Expense%20Report%20Creation.pdf>.

Step	Process Actions
1	Login to Single Sign On, and select the Concur tab.
2	Under the "Expense" tab, select "View Authorization Requests." The next screen will display authorization requests to book the trip from. Check the trip, and then select "Create Expense Report."
3	Complete the trip details not already populated on the next screen. Select "Next" to continue.
4	The next screen will display a list of credit card charges. Select the charges needing to be reported. After selecting your charges, select "Import." To items without an e-receipt, select the expense type and complete the details. Select "Save." The item will now display under "Expenses." Select "New Expense" to add an out-of-pocket expense. Complete the details, and select "Save."
5	You can then select the "Receipts" tab to manage your receipts.
6	If you're a delegate, you can now email the traveler for notification of the expense report needing to be submitted. If you're a traveler, you may now select "Submit Report" if no further changes are needed. On the pop-up screen that shows next, the traveler may now select "Accept and Submit" to certify and submit the report, or "Cancel" to make any additional changes needed.
7	Upon selection of "Accept and Submit," the expenses report has now been submitted, and notification of process completion will be sent. The traveler will then receive notification once the expense report has been approved.

After your Trip

expense report approval

Travel expense reports must be approved by an approver, who will receive notification that the expense report is available to view for approval. Detailed training resources pertaining to this process can be found on The Texas A&M University System Travel Web site:

https://www.tamus.edu/assets/files/travel/pdf/expense_report_approval.pdf.

Step	Process Actions
1	Login to Single Sign On, and select the Concur tab.
2	Scroll to the "Approval Queue" which displays expense reports awaiting approval. Select the expense report needing approval.
3	The approver will have access to view receipts and details. To view the header, under the "Details" tab, select "Report Header." To view any hard copy receipts that were attached, under the "Receipts" tab, select "View Receipts in New Window." Each expense component details may be viewed by selecting the expense type.
4	At this point, the approver has the option to either send the report back to the traveler with a note indicating why the expense report is returned by selecting "Send Back to Employee," or approve the expense report by selecting "Approve." If the approver selects "Accept" on the next pop-up screen, they will have certified the expense report.
5	The approver will then receive a confirmation pop-up screen. The expense report will now not display in the pending reports screen, and has now moved onto the next step in the work-flow.

Questions

and additional resources

Questions? Contact Shiao-Yen Ko <sko@ag.tamu.edu or 979.845.4778> or Kim Payne <kpayne@ag.tamu.edu or 979.845.4764>.

Travel portion of the Texas A&M AgriLife Administrative Services Web site:
<http://agrilifeas.tamu.edu/fiscal/travel/index.php>

Concur Details: <http://agrilifeas.tamu.edu/fiscal/travel/resources/index.php#concur-e-travel>

The Texas A&M University System Travel Office:
<http://www.tamus.edu/offices/travel>

Detailed Online Training: <http://www.tamus.edu/offices/travel/concur-on-line-training/>