



March 3, 2021

TO: Texas A&M AgriLife Business/Travel Contacts  
 SUBJECT: Travel Virtual Conferences- New Travel Classification

A few months ago, we started requiring a Concur request to be attached to all submitted expense reports. I know many of y'all do the same. However, that requirement became cumbersome when it comes to virtual conferences with no travel involved. We had been advising employees to use their payment card instead. So to accommodate use of the travel card for virtual conferences a new travel classification has been established called "Employee-Virtual Only (No Travel)." Reports created with that classification will bypass our request requirement. The expense types on this classification will be limited to only Conference Registration and Dues. If any other expense type is used the user will be instructed to select another choice in the Travel Classification field. See below.

So this will change the advice we've been giving our customers, advising them to use a payment card. Now they can use a travel card if they choose to.

Below is the new classification:

The screenshot shows a Concur expense report form with the following fields and values:

- Policy: Travel
- Destination: Test Travel
- Trip Start Date: 02/18/2021
- Trip End Date: 02/19/2021
- Report Date: 02/24/2017
- Purpose & Benefit: test
- Report Key: 348415
- Report Id: B44F5E5BD95A4D3CA5F9
- Report Currency: US, Dollar
- Approval Status: Sent Back to Employee
- Payment Status: Not Paid
- Policy: TRAVEL
- System Member: (02) TEXAS A&M UNIVERSI
- Department / Sub-Department: (FISC OPS) FMO - ACCOUN
- Account: (210410 22000) FMO - ACC
- Account Attributes: (L) LOCAL
- Personal Travel Included?:
- Department Reference Number:
- Travel Classification: **Employee-Virtual Only (No Travel)** (highlighted with a red arrow)
- Student Travel Type:
- Headquarters: COLLEGE STATION, TX
- Notes:
- GSA Meal Rate: 50.00
- Over 90 Day Explanation:

The dropdown menu for Travel Classification includes the following options:

- Board of Regents
- Employee-Foreign
- Employee-In State
- Employee-Out of State
- Employee-Virtual Only (No Travel)**
- Non-Employee Contract Services Domestic Vendor
- Non-Employee Contract Services Foreign Vendor
- Non-Employee Lecturers Domestic Vendor
- Non-Employee Lecturers Foreign Vendor
- Participant-In State (Non-Employees Only)
- Participant-Out of State (Non-Employees Only)
- Prospective Employee-Domestic
- Prospective Employee-Foreign
- Prospective Student
- Spouse-Approval Required
- Student-Domestic Travel
- Student-Foreign Travel

Buttons at the bottom of the form include: Add, Remove, Approved, Amount Remaining, Save, and Cancel.



When selected, a Request will not be required when the report header is saved. However, the expense types that can be used are limited to Conference Registration and Dues. Any other expense type will generate a hard-stop exception requiring the user to select a different classification. If there is a need for additional expense types that can be adjusted as needed. But just off the top of my head I can't see other expenses that would be valid if no travel is occurring.

## Test Travel

+ New Expense + Quick Expenses Import Expenses Details Receipts Print / Email

Expense Type	Date	Amount	Exception
Meals	03/08/2021	\$25.00	The travel classification selected is only valid for virtual conferences where no travel took place. Please open your report header and select a valid choice in the Travel Classification field.

Expenses

Date	Expense Type	Amount	Requested
03/08/2021	Meals	\$25.00	\$25.00
03/08/2021	Conference Registration test	\$500.00	\$500.00
03/08/2021	Dues test	\$500.00	\$500.00

New Expense

Expense Type

Recently Used Expense Types

- Dues
- Conference Registration
- Meals
- Personal C

All Expense Types

- Cash Advance
- ...Lodging
- ...Other
- ...Transport

For questions, please contact:

Gwen Marucci at (979) 845-4748 or [gwenc@tamu.edu](mailto:gwenc@tamu.edu) , Jennifer Owen at (979) 458-1754 [jennifer.owen@ag.tamu.edu](mailto:jennifer.owen@ag.tamu.edu) or Jason Engledow at (979) 845-0322 [jason.engledow@ag.tamu.edu](mailto:jason.engledow@ag.tamu.edu)

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