TAMUT TRAVEL DEPARTMENT PRESENTS:
eTravel/CONCUR 101 TRAINING
Travel Contacts

- During business hours: Traci Restelle at 903-223-3173

- After-hours travel card declines for hotel and/or rental car, contact Toni Burton at 903-223-3056. All other declines will be addressed the following business day.
WELCOME EAGLES!!!
How to Order a Travel Credit Card

- Fill out the CBT Travel Card Application found on our website...
- [http://tamut.edu/About/Administration/travel/index.html](http://tamut.edu/About/Administration/travel/index.html)
- Please ensure your supervisor signs the application
- Complete the Acknowledgement form at the end of the Travel Guidelines PowerPoint
- Send original application and Acknowledgement Form to the Travel Office
What is eTravel/CONCUR?

* eTravel/Concur integrates pre-trip approval and expense reporting with a complete travel booking solution.
* This comprehensive Web-based service provides all of the tools users need to book travel as well as create and submit expense reports.
* Managers use the service to review and approve expense reports.
* Back-office employees use the service to produce audit reports, ensure compliance, and deliver business intelligence to help your company reduce its costs.
How to log on eTravel/Concur:

* [https://sso.tamus.edu](https://sso.tamus.edu)

* Login to HR Connect (Single Sign On) using UIN and current password

* Select eTravel/Concur tab
First Things First. .................

............. Setting Up a Traveler’s Profile

* Select Profile Tab
* Select "Personal Information"
* Verify pre-loaded content
* Complete remaining requirements and preferences
* Designate Assistants and Travel Arrangers, if applicable
* Designate Expense Delegates, if applicable
* Add credit card information

* Note: Required fields are denoted in red.
Adding Assistants/Travel Arrangers and Expense Delegates

To setup Assistant/Travel Arrangers:

* Select Profile Tab.
* Select “Assistant/Travel Arrangers” under the “Travel Settings” header on the left-hand column.
* Click on “Add an Assistant”
* Type in the delegates UIN #
* Select “Can book travel for me” and “Is my primary travel assistant” if applicable

To setup Expense Delegates:

* Select Profile Tab
* Select "Expense Delegates" under the "Expense Settings" header on the left-hand column.
* Click on “Add”
* Type in the delegates UIN #
* Check mark “can prepare” and “receive emails”
* Select “Save”
Profile Options

Select one of the following to customize your user profile.

**Personal Information**
Your home address and emergency contact information.

**Company Information**
Your company name and business address or your remote location address.

**Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.

**System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/stop?

**Contact Information**
How can we contact you about your travel arrangements?

**Setup Travel Assistants**
You can allow other people within your company to book trips and enter expenses for you.

**Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.

**Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.

**Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Mobile Registration**
Set up access to Concur on your mobile device.
Customizing Home Page

* To customize additional user settings, select "System Settings"
* Select “Other Preferences”
* Click on Home Page down arrow
* Select “My Concur”
* Home page allows you to see all your Concur activities on one page
* You may move these windows and place them in any order you prefer
* To add mobile access via apps for iPhones, Blackberries, and Android devices, select "Mobile Registration" under the "Other Settings" header on the left-hand column.
Creating the Travel Request (TR):

- Under the “Request" tab, select "New Request," complete the request details, and then select "Save."
Travel Request Screen

![Travel Request Screen](image-url)

### Request Form Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Name/Destination</td>
<td>-</td>
</tr>
<tr>
<td>Trip Start Date</td>
<td>-</td>
</tr>
<tr>
<td>Trip End Date</td>
<td>-</td>
</tr>
<tr>
<td>Travel Classification</td>
<td>-</td>
</tr>
<tr>
<td>Non-Employee/Student Traveler (Last Name, First Name)</td>
<td>-</td>
</tr>
<tr>
<td>Notes</td>
<td>-</td>
</tr>
<tr>
<td>Foreign Country 1</td>
<td>-</td>
</tr>
<tr>
<td>Foreign Country 2</td>
<td>-</td>
</tr>
<tr>
<td>Foreign Country 3</td>
<td>-</td>
</tr>
<tr>
<td>Foreign Country 4</td>
<td>-</td>
</tr>
<tr>
<td>System</td>
<td>-</td>
</tr>
<tr>
<td>System Member</td>
<td>-</td>
</tr>
<tr>
<td>Department/SubDepartment</td>
<td>-</td>
</tr>
<tr>
<td>Account</td>
<td>-</td>
</tr>
<tr>
<td>Account Attribute</td>
<td>-</td>
</tr>
<tr>
<td>Department Reference Number</td>
<td>-</td>
</tr>
</tbody>
</table>
Entering Trip Information

- Add Trip/Destination field should include the City & State
- Fill in trip start and end date (manual or calendar)
- Fill in purpose and benefit to the University
- Select the travel classification
- Select the traveler type
- Denote personal travel – “Yes or No”
- Add notes to supervisor or auditors
- System Member is “22”
- Department/SubDepartment
- Account & Account Attributes
### Request Details

**Trip Name/Destination:**
- Houston, TX/Elongated/10-1

**Trip Start Date:** 10/01/2017

**Trip End Date:** 10/05/2017

**Travel Classification:** Employee-In-State

**Traveler Type:** Staff

**Student Travel Activity Type:**
- No

**Trip Purpose & Benefit:**
- Travel to Houston to attend conference

**Personal Travel Included?:** No

**Non-Employee/Student Traveler (Last Name, First Name):**

**Notes:**

**Foreign Country 1:**

**Foreign Country 2:**

**Foreign Country 3:**

**Foreign Country 4:**

**System:** FMIS

**Department/SubDepartment:** (PURC) PROCUREMENT & DISBURSE

**Account:**

**Account Attribute:**

**Department Reference Number:**

**Status:** Not Submitted
Selecting an Account Number

* Do not change the System Member number. It will always default to our system number “22”.

* When selecting an account number click in the box labeled account and a drop down box will appear. Type the department for the account being used, list of account numbers will appear where you can pick your account number here.

* If you are not sure of your department number you may ask your Admin.
When adding traveler classification and type make sure the correct classification is being used.

For example: If creating an TR for a prospective employee, guest traveler or student make sure to select the appropriate classification.

If you are creating an TR for a traveler who is a prospective employee or guest traveler a W-9 form needs to be filled out and sent to Accounts Payable. Please note on the W-9 that the traveler needs to be added in Concur. Form located on the Accounts Payable website.
**Personal Travel:** Please denote if the traveler is going to have any personal travel while on their trip. Select “Yes” or “No”.

**Notes:** The notes section is reserved for any extra information you will need to explain about the trip. Here is where you can add notes regarding students and/or for multiple traveler approval. Any notes that will help put trips together or offer any type of explanations.

**Department Reference Number:** This field may be used by department. It is not mandatory.

**Contracts:** This field will be defaulted as “No” even if you do have a contract or grant. You will need to change to “Yes” if using grant funds.
Click “Foreign Risk Acknowledgment” box and select “Country(s) not under a warning” or “Country(s) under US State Dept warning”.

Foreign Country 1, 2, 3, 4: “Foreign 1” – select the first country; “Foreign 2, 3, 4” – select the second, third or fourth countries (if applicable) where traveler will visit.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Name/Destination</td>
<td>Houston, TX/Elongoria10-1</td>
</tr>
<tr>
<td>Trip Purpose &amp; Benefit</td>
<td>Travel to Houston to attend Conc...</td>
</tr>
<tr>
<td>Trip Start Date</td>
<td>10/01/2017</td>
</tr>
<tr>
<td>Trip End Date</td>
<td>10/05/2017</td>
</tr>
<tr>
<td>Travel Classification</td>
<td>Employee-in-State</td>
</tr>
<tr>
<td>Traveler Type</td>
<td>Staff</td>
</tr>
<tr>
<td>Student Travel Activity Type</td>
<td></td>
</tr>
<tr>
<td>Contracts/Grants</td>
<td>No</td>
</tr>
<tr>
<td>Personal Travel Included?</td>
<td>No</td>
</tr>
<tr>
<td>Non-Employee/Student Traveler (Last Name, First Name)</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Foreign Country 1</td>
<td></td>
</tr>
<tr>
<td>Foreign Country 2</td>
<td></td>
</tr>
<tr>
<td>Foreign Country 3</td>
<td></td>
</tr>
<tr>
<td>Foreign Country 4</td>
<td></td>
</tr>
<tr>
<td>Country(s) under US State Dept warning</td>
<td></td>
</tr>
<tr>
<td>Foreign Risk?</td>
<td></td>
</tr>
<tr>
<td>Country(s) not under US State Dept warning</td>
<td></td>
</tr>
<tr>
<td>System Member</td>
<td>Texas A&amp;M Uni-Corpus Christi</td>
</tr>
<tr>
<td>Department/SubDepartment</td>
<td>(PURC) PROCUREMENT &amp; DISBURSE</td>
</tr>
<tr>
<td>Account</td>
<td></td>
</tr>
<tr>
<td>Account Attribute</td>
<td></td>
</tr>
<tr>
<td>Department Reference Number</td>
<td></td>
</tr>
</tbody>
</table>
Once you have filled out all the required fields hit Save.
Encumbering your Expenses

* Select “New Expense”
* Choose the expense you would like to add to your TR.
* Type in the amount you are requesting for each entry.
* Make sure the account number is correct. You may encumber a different account for each expense up to 4 accounts including the account listed on the Request Header by using the Allocate button.
* Add any notes and/or higher lodging rate requested for your hotel expense.
* When selecting lodging and meals please make sure you include the General Services Administration (GSA) per diem rates. They can be found on [www.gsa.gov](http://www.gsa.gov).
Encumber your Expenses
If requesting a higher lodging rate please choose Yes or No in the Higher Lodging Rate Requested box.

A higher lodging rate is sometimes needed if the GSA per diem rate is not available or the hotel of the conference site has a specific rate that is higher than the standard rate.
Higher Lodging Requested Here

Request FUXD

Trip Name/Destination: Houston, TX / Longoria/10-1
Trip Purpose & Benefit: Travel to Houston to attend Conc...

Expense Type: Hotel
Transaction Date: 10/13/2017
Description:

Higher Lodging Rate Requested:
- No
- Yes

Transaction Amount:
- 0.00 USD

Comment:

FAMS REF A:

FAMS REF B:
Submitting the request...

* Once you have requested all your expenses for the trip they will appear on the left side of your TR.

* You will then click on the “Submit Request” tab. This will send the request to your supervisor to approve.
How to read your TR...

There are different ways to read your Travel request:

* Click on the “Requests” tab and all “Active Requests” will come up. Choose the one you want to look at.
  * This will show you the basic information of your TR. It will also show you the “Request ID” assigned to your request.

* Click on “Audit Trail”,
  * This will tell you who has touched your document.

* Click “Approval Flow”
  * This will show the status of your TR and who’s box it is sitting in.
Travel Request ID

Request FUXD

Trip Name/Destination: Houston, TX/ELongoria/10-1
Trip Purpose & Benefit: Travel to Houston to attend Con...
## Request CJPP

**Trip Name/Destination:** Houston/Longoria/081016  
**Trip Purpose & Benefit:** Travel to Houston to attend the ...

### Request Level

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Updated By</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/12/2016 03:24 PM</td>
<td>LONGORIA, ELIZABETH</td>
<td>Confirmation Agreement Acceptance</td>
<td>FAMIS Request Submit Confirmation</td>
</tr>
<tr>
<td>07/12/2016 03:24 PM</td>
<td>LONGORIA, ELIZABETH</td>
<td>Approval Status Change</td>
<td>Status changed from Not Submitted to Submitted</td>
</tr>
<tr>
<td>07/12/2016 03:24 PM</td>
<td>LONGORIA, ELIZABETH</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted to Submitted &amp; Pending Approval Comment:</td>
</tr>
<tr>
<td>07/12/2016 03:24 PM</td>
<td>System, Concur</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted &amp; Pending Approval to Auto Approved Comment:</td>
</tr>
<tr>
<td>07/18/2016 09:02 AM</td>
<td>HARRAL, JUDY</td>
<td>Approval Status Change</td>
<td>Status changed from Pending Cost Object Approval to Approved Comment:</td>
</tr>
<tr>
<td>07/18/2016 09:02 AM</td>
<td>System, Concur</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted &amp; Pending Approval to Auto Approved Comment:</td>
</tr>
<tr>
<td>07/18/2016 09:02 AM</td>
<td>System, Concur</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted &amp; Pending Approval to Auto Approved Comment:</td>
</tr>
<tr>
<td>07/18/2016 09:02 AM</td>
<td>System, Concur</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted &amp; Pending Approval to Auto Approved Comment:</td>
</tr>
<tr>
<td>07/18/2016 09:02 AM</td>
<td>System, Concur</td>
<td>Approval Status Change</td>
<td>Status changed from Submitted &amp; Pending Approval to Auto Approved Comment:</td>
</tr>
<tr>
<td>12/10/2016 06:27 AM</td>
<td>System, Concur</td>
<td>Close/Inactivate Status Change</td>
<td>Request was closed/inactivated</td>
</tr>
</tbody>
</table>
Approval Flow

Request CJP

Trip Name/Destination: Houston/Longoria/081016
Trip Purpose & Benefit: Travel to Houston to attend the ...

Cost Object Approval:
(07/18/2016 Approved)

ADMINISTRATIVE SERVICES (FAMIS-15-ADMIN): (07/18/2016 Approved)

HARRAL, JUDY A.
(07/18/2016 Approved)
Booking Hotels, Flights and Car Rentals

Once trip is approved in Concur, traveler may:

* Book local and international flights
* Make car rental reservations
* Reserve hotels
* Using our contracted Concur travel agent, Corporate Travel Planners is recommended. Once all reservations are complete, traveler is ready to go on trip.
* Using Expedia, Travelocity, and other online booking agents is highly discouraged.
Corporate Travel Planners

- Will provide and deliver comprehensive, client specific travel management services faster and cheaper
- Online booking fees will be included with total amount charged to credit card
- For Group travel it is recommended you utilize Corporate Travel Planners, fees will apply.
- Corporate Travel Planners is the only State Contract travel agency we can use.
# Fee Schedule for Corporate Travel Planners

<table>
<thead>
<tr>
<th>Type</th>
<th>Line Item Detail</th>
<th>Corporate Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>On-Line Booking</td>
</tr>
<tr>
<td>Domestic</td>
<td>Airline ticket only</td>
<td>$2.00</td>
</tr>
<tr>
<td></td>
<td>Car reservation only</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Hotel reservation only</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Rail ticket only</td>
<td>$2.00</td>
</tr>
<tr>
<td>Service Description</td>
<td>Fee 1</td>
<td>Fee 2</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
<td>-------</td>
<td>-------</td>
</tr>
<tr>
<td>Bus ticket only</td>
<td>$2.00</td>
<td>$10.00</td>
</tr>
<tr>
<td>Flat fee for booking any combination of airline, car rental, lodging, rail and bus ticket.</td>
<td>$2.00</td>
<td>$18.00</td>
</tr>
<tr>
<td>Group Tickets: Per person flat fee for group tickets.</td>
<td>$0.00</td>
<td>$18.00</td>
</tr>
<tr>
<td>Ticket exchange fee</td>
<td>$5.00</td>
<td>$5.00</td>
</tr>
<tr>
<td>Ticket refund fee</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Voids</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>International</strong></td>
<td><strong>Airline ticket only</strong></td>
<td><strong>Car reservation only</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td></td>
<td>$2.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## CTP Fee Schedule Cont.

<table>
<thead>
<tr>
<th>Miscellaneous/Other</th>
<th>Voids</th>
<th>$0.00</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Connect –domestic or international*</td>
<td>$4.00</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Paper ticket-domestic or international</td>
<td>$15.00</td>
<td>$15.00</td>
<td></td>
</tr>
<tr>
<td>Express paper ticket delivery fee</td>
<td>$30.00</td>
<td>$30.00</td>
<td></td>
</tr>
<tr>
<td>Group and meeting planning fees (per person)</td>
<td></td>
<td>See Below</td>
<td></td>
</tr>
<tr>
<td>After Hours Service (per call)</td>
<td>$16.00</td>
<td>$16.00</td>
<td></td>
</tr>
<tr>
<td>Non-GDS Hotel Reservation</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>
## Additional Fees

<table>
<thead>
<tr>
<th>Description</th>
<th>Corporate Travel Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>On-Line Bookings</td>
</tr>
<tr>
<td>Agent Assist Fee - Examples include but are not limited to: Modify ground</td>
<td>$10.00</td>
</tr>
<tr>
<td>transportation (car, limo, car service), hotel, or air booking that does</td>
<td></td>
</tr>
<tr>
<td>not require a new ticket, quotes requested through an agent but ticketed</td>
<td></td>
</tr>
<tr>
<td>online or not ticketed at all, manual Pretrip approval process that is</td>
<td></td>
</tr>
<tr>
<td>not able to be automated</td>
<td></td>
</tr>
<tr>
<td>Call Direct to Supplier - If a request to an agent (online or to an agent direct) requires an agent to call a vendor, we will charge $10.00 for each outbound call.</td>
<td>$10.00</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Professional services fee (per hour) - assistance with account management; IT projects; customization of program for individual agencies; and other projects outside of mandatory scope of RFP</td>
<td>CTP will assign an Account Executive to help manage The Texas A&amp;M System at no additional cost.</td>
</tr>
</tbody>
</table>

* CTP does not charge a per person research fee for group travel.

CTP charges a flat research fee of $200.00-$500.00 depending on group size and complexity of trip.

This fee is applied towards the cost of the trip, if booked through CTP.
Once you have returned from your trip you will create an expense report to reconcile your charges and be reimbursed for any out of pocket expenses.

Log on to SSO, select “eTravel/Concur Page” and select the Expense tab.

Available expenses will be listed here. Click on the items you need to move to your expense report and click on “Move” then choose “To New Report”.

Once you have started your report you can click on the report header and add your approved travel request and it will populate all your information into your report.

Type in the correct account number.

Click on the “Auth. Encumbrance Release” and select “Final”.

Once you verify the information on the report click on “next”.

Now you have come back from your trip……. What to do next?
### Available Expenses

<table>
<thead>
<tr>
<th>Expense Detail</th>
<th>Expense Type</th>
<th>Source</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SACNAS 831-4590170, CA</td>
<td>Conference Registration</td>
<td></td>
<td>08/21/2017</td>
</tr>
<tr>
<td>Policy</td>
<td>Destination</td>
<td>Trip Start Date</td>
<td>Trip End Date</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------</td>
<td>-----------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Travel</td>
<td>college station</td>
<td>03/05/2020</td>
<td>03/08/2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report Date</th>
<th>Purpose &amp; Benefit</th>
<th>Report Key</th>
<th>Report Id</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/05/2020</td>
<td>test</td>
<td>711800</td>
<td>E3D4264982345299E1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report Currency</th>
<th>Approval Status</th>
<th>Payment Status</th>
<th>Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>US, Dollar</td>
<td>Not Submitted</td>
<td>Not Paid</td>
<td>TRAVEL</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>System Member</th>
<th>Department / Sub-Department</th>
<th>Account</th>
<th>Account Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>(22) TAMU - TEXARKANA</td>
<td>(30000) VICE PRESIDENT C</td>
<td>(206301 00000) VPFA PROF</td>
<td>(L) LOCAL</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Travel Included?</th>
<th>Department Reference Number</th>
<th>Travel Classification</th>
<th>Student Travel Type</th>
<th>Famis External VID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Employee-In State</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notes</th>
<th>Auth. Request Encumbrance Release</th>
<th>Final</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>GSA Meal Rate</th>
<th>Over 90 Day Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Cancel</td>
</tr>
</tbody>
</table>
Claiming your Out of Pocket Expenses…

- Click on New Expense
- Select the expense you are claiming
- Fill out all required fields denoted in red
- If claiming hotel you need to itemize your expenses
- Click on hotel; select itemize.
- On Payment Type choose “Out of Pocket”
- Choose your expense type; Fill in the required fields; and select “Save Itemizations”.
- The expense will populate to the left of the screen with the expense type and itemized amount(s).
- The total itemization must balance to the amount being claimed.
The maximum state mileage reimbursement rate for travel by state employees in a personal vehicle is adjusted each calendar year.

This rate is consistent with the Internal Revenue Service’s standard mileage rate. For more information, see State Mileage Reimbursement Rate (FPP S.005), Transportation: Mileage in a Personal Vehicle in Textravel.
Credit Card Charges and Expenses

* Once your charges and expenses appear on report you will need to assign the expense type to each expense. If “undefined” is showing, that indicates Concur does not know what the expense type is, so you need to tell it.

* Click on the line item to complete transaction details and make sure that the orange circle with a credit card in the middle is showing. This indicates you used your travel card. It looks like this: 😊

* Line items can also be itemized and/or allocated to a different account

* Attach receipt if required

* Save (you may also save as you enter data)
If line item needs to be expensed to a different account number...

- Click on line item
- Select allocate (located on lower right side of screen)
- New window appears
- Select account number
- Allocate by amount or percentage
- Click Save and Done
The red circle with the exclamation mark indicates a hard warning and will not allow you to submit this report until the error has been corrected.
How to upload a receipt..

Attaching a receipt to the expense line.

* Scan receipt(s)
* Save receipt(s) to desktop
* Select “Attach Receipt”
* Box pops up
* Select “Browse”
* Find receipt on desktop
* Click “Attach”
* Receipt is attached

Attaching a document(s) and/or receipt(s) to expense report.

* Scan receipt(s)
* Save document(s)/receipt(s) to desktop
* Select “Receipts” tab
* Select “Attach Receipt Images”
* Box pops up
* Select “Browse”
* Find receipt(s) on desktop
* Click on “Upload”
* Verify box shows “Attached”
* Select “Close”
HOU LONG/081116

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/12/2016</td>
<td>Car Rental</td>
<td>$77.45</td>
<td>$77.45</td>
</tr>
<tr>
<td>05/11/2016</td>
<td>Hotel</td>
<td>$145.41</td>
<td>$145.41</td>
</tr>
<tr>
<td>05/11/2016</td>
<td>Gasoline</td>
<td>$26.00</td>
<td>$26.00</td>
</tr>
<tr>
<td>05/11/2016</td>
<td>Meals</td>
<td>$23.76</td>
<td>$23.76</td>
</tr>
<tr>
<td>05/11/2016</td>
<td>Meals Marriott JW Houston F H</td>
<td>$5.90</td>
<td>$5.90</td>
</tr>
<tr>
<td>05/11/2016</td>
<td>Parking</td>
<td>$18.40</td>
<td>$18.40</td>
</tr>
<tr>
<td>05/10/2016</td>
<td>Meals</td>
<td>$12.31</td>
<td>$12.31</td>
</tr>
<tr>
<td>05/10/2016</td>
<td>Meals Marriott JW HOUST PARK, Hou</td>
<td>$28.19</td>
<td>$28.19</td>
</tr>
</tbody>
</table>

Total Amount: $337.47  Total Approved: $337.47
Click on “Browse”, search for receipt(s) select “Attach”, “Upload” and then “Close”
How to view your receipts…..

* Select the “Receipts Tab”
* Click on “View Receipts in New Window”.
* Your receipts will pop up in a PDF screen.
<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Vendor Name</th>
<th>City</th>
<th>Payment Type</th>
<th>Number of Days</th>
<th>Business Purpose</th>
<th>Amount</th>
<th>Vendor</th>
<th>Payee ID</th>
<th>Payment Method</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/14/2016</td>
<td>Car Rental</td>
<td>ENTERPRISE RENT-A-CAR</td>
<td>Corpus Christi, Texas</td>
<td>Corporate Credit Card</td>
<td>77.48</td>
<td>Enterprise</td>
<td>77.48</td>
<td>Enterprise</td>
<td>ENTERPRISE RENT-A-CAR</td>
<td>04/22/2016</td>
<td></td>
</tr>
<tr>
<td>06/15/2016</td>
<td>Meals</td>
<td>SHELL OIL 10003082000, El Campo</td>
<td>El Campo</td>
<td>Credit Card</td>
<td>77.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/16/2016</td>
<td>Meals</td>
<td>MARRIOTT JW HOUSTON F&amp;B, Houston</td>
<td>Houston</td>
<td>Credit Card</td>
<td>77.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/16/2016</td>
<td>Parking</td>
<td>MARRIOTT JW HOUST PARK, Houston</td>
<td>Houston</td>
<td>Credit Card</td>
<td>77.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/16/2016</td>
<td>Meals</td>
<td>SHELL OIL 10003082000, El Campo</td>
<td>El Campo</td>
<td>Credit Card</td>
<td>77.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/16/2016</td>
<td>Meals</td>
<td>MACGRAVES HOUSTON, Houston</td>
<td>Houston</td>
<td>Credit Card</td>
<td>77.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Attendees:
- Attendee Name: [Attendee Name]
- Attendee Title: [Attendee Title]
- Company: [Company]
- Attendee Type: [Attendee Type]
- Amount: [Amount]
The detailed report shows object codes, amount due to traveler and/or company.

- Open Report
- Select the “Print/Email” tab
- Click on “Texas A&M Detailed Report”
- Report will populate
- Able to print, email, or get PDF copy of report
Houston/Longoria/081116

**Expenses**
- **Date**: 08/12/2016
- **Hotel**: HOYO INDIGO, Houston, Texas
  - Amount: $145.41
- **Gasoline**
  - Shell Oil 1000390208, El Cerrito
  - Amount: $20.00
- **Meals**
  - Shell Oil 1000390208, El Cerrito
  - Amount: $23.75
- **Meals**
  - Marriott JW Houston F&B, Houston
  - Amount: $5.90
- **Parking**
  - Marriott JW Houston Park, Houston
  - Amount: $18.40
- **Meals**
  - Shell Oil 1000390208, El Cerrito
  - Amount: $12.31
- **Meals**
  - Maggiano's Houston, Houston, TX
  - Amount: $28.19

**Attendees**
- [ ] Attendee Name

**Other Information**
- Vendor Name: Enterprise Rent A Car
- City: Corpus Christi, Texas
- Payment Type: Corporate Card Liability
- Number of Days: 77.46
- Total Amount: $77.46
- Approval: YES
- FAMIS Ref: A

**Business Purpose**
- [ ] Personal Expense (do not reimburse)
- Vendor: Enterprise Rent A Car
- Amount: $77.46
- Total: $77.46
- Remaining: $77.46

**Note:** This document appears to be a form or report for expenses related to a business trip, including accommodations, meals, and transportation costs. The form includes fields for vendor information, payment details, and business purpose, with options for approval and reimbursement.
Expense Report
Report Name: Houston/Longoria/081116

Authorization Request
Name: Houston/Longoria/081016
Request ID: CJPP

Employee Name: LONGORIA, ELIZABETH A.
Employee ID: 319005726
*Custom 9-Job Title: CARD SERVICES COORDINATOR
*Custom 8-Headquarters: CORPUS CHRISTI, TX

Report Header
Policy: FAMIS
Business Purpose: Travel to Houston to attend the Concur Fusion Exchange Event.
Report Key: 305455
Report Id: 14AB091D299547C49B05
<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Expense Type</th>
<th>Vendor Name</th>
<th>Vendor City</th>
<th>Payment Type</th>
<th>Amount</th>
<th>Account Code</th>
<th>*FAM-Custom 03-FAMIS REFA</th>
<th>*TAM - Custom 01 - Travel Classification</th>
<th>Has Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/19/2012</td>
<td>Hotel</td>
<td>La Quinta</td>
<td>Austin</td>
<td>Out of Pocket</td>
<td>$113.90</td>
<td></td>
<td></td>
<td>In State</td>
<td>No</td>
</tr>
</tbody>
</table>

**Allocations:** 100.00% ($113.90) FAMIS-15-PURC-285523 00000-L

| 11/20/2012       | Hotel Tax    | La Quinta   | Austin      | Out of Pocket | $5.90      |              |                          | In State                               | No            |

**Allocations:** 100.00% ($5.90) FAMIS-15-PURC-285523 00000-L

Note: The sum of allocation amounts may not exactly match the expense amount due to rounding.

**Company Disbursements**

- Amount Due Employee: $113.90
- Amount Due Company Card: $0.00
- Total Paid By Company: $113.90

**Employee Disbursements**

- Amount Due Company: $0.00
- Amount Due Company Card From Employee: $0.00
- Total Paid By Employee: $0.00
Now you are ready to Submit...

- Once you have completed your Expense Report for your trip you will now Submit the Report.

- Click on the “Submit Report” button on the top right

- You will be prompted to a “Final Review”

- Select “Accept and Submit”
A travel is <50 mile radius of TAMUCC, or you are only claiming mileage reimbursement. All student travel >25 mile radius of TAMUCC requires pre-trip approval.

### Recently Used Expense Types

<table>
<thead>
<tr>
<th>Meals</th>
<th>Hotel</th>
<th>Business Meal</th>
<th>Hotel Tax</th>
<th>Gasoline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual Meals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Meal</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Business Meal-Alcohol</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meals-Non-Overnight</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Tax Charged in Error</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
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<td>Other</td>
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<tr>
<td>Other</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Car-Mileage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### All Expense Types

- **Communications**
  - Phone
- **Lodging**
  - Hotel
  - Hotel Tax
  - Rent-Apartment/House
- **Other**
  - Dues
  - Educ Books < SSR
  - Gifts
  - Incidents
  - Internet
  - Laundry
  - Rental of Space
- **Personal Car-Mileage**
- **Transportation**
  - Airfare Ticket Tax
  - Airline Fees
  - Airline Ticket Change Fee
  - Boat
  - Bus/ Shuttle
  - Car Rental
  - Gasoline
  - Tolls
  - Train
Final Review

User Submit
I certify that these expenses are true, correct, and unpaid to the best of my knowledge. I further certify that these expenses were incurred in the course of conducting official business, research, or other sponsored activities, and that these expenses are properly chargeable to the account(s) listed. I further certify that no alcohol was purchased in association with meals being expensed, or if there was, a receipt has been provided, the expenses marked appropriately and the business purpose of the alcohol has been documented in the comments or purpose field.

Reminder: Receipts Required!
According to company policy, you must provide receipts for the expenses listed below. You may attach scanned images to individual expenses or to the report.
Questions????
CONGRATULATIONS!!!!!

* You have successfully completed the eTravel/Concur 101 Training

* THANK YOU...