



CONCUR 101 TRAINING

WELCOME EAGLES!!!



Travel Contacts

During business hours: **K'Leeh Holt** at **903-223-3112**

Please only call after-hours for hotel and/or rental car travel card declines. All other declines will be addressed the following business day.

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>

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 CONCUR?

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 to Concur:

<https://sso.tamus.edu>

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

Select Concur

Applications you have access to

Name : [REDACTED]

SSO Menu

| | |
|-------------------------------------|--|
| ▶ Business Objects | ▶ Business Objects CMC |
| ▶ Canopy | ▶ Canopy (Training) |
| ▶ Concur | ▶ DW Report Portal |
| ▶ Endowment Reports | ▶ HRConnect Legacy |
| ▶ Maestro | ▶ MyEvive |
| ▶ TrainTraq | ▶ Workday |
| ▶ Workday Help | |

[Manage Menu](#) [Refresh Menu](#)

You have hidden menu items which may be shown by clicking the Manage Menu button.

My Links

| |
|--------------|
| 1099Pro Prod |
| 1099Pro Test |

[Manage Links](#)

Recent Logon Activity [Help](#)

| Date/Time | Activity |
|---|-------------------|
| <input type="checkbox"/> 04/23/2021 | Successful Logon. |
| <input type="checkbox"/> 04/23/2021 | Successful Logon. |
| <input type="checkbox"/> 04/23/2021 | Successful Logon. |
| <input type="checkbox"/> 04/22/2021 | Successful Logon. |
| <input type="checkbox"/> 04/22/2021 | Successful Logon. |

[View Security Log](#)

What should I report?

[Report Problem](#)

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"

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Company Car
- Favorite Attendees

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.

Request 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.

Company Car

Company Car

System Settings

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

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies 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

CONCUR Requests Travel Expense Approvals Reporting App Center Administration Help Profile

Manage Requests **New Request** Process Requests Quick Search

Request Cancel Save Print / Email Delete Request Submit Request Status: Not Submitted

Trip Name/Destination:
Trip Purpose & Benefit:

Request Header Expenses Approval Flow Audit Trail

| | | | | | | |
|------------------------|----------------------|----------------------|-----------------------|----------------------|------------------------------|------------------|
| Trip Name/Destination? | Trip Start Date | Trip End Date | Travel Classification | Traveler Type | Student Travel Activity Type | Contracts/Grants |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | No |

| | | | |
|------------------------|---------------------------|--|----------------------|
| Trip Purpose & Benefit | Personal Travel Included? | Non-Employee/Student Traveler (Last Name, First Name?) | Notes |
| <input type="text"/> | No | <input type="text"/> | <input type="text"/> |

| | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| Foreign Risk? | Foreign Country 1 | Foreign Country 2 | Foreign Country 3 | Foreign Country 4 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | | | |
|--------|------------------------------------|-------------------------------|----------------------|----------------------|-----------------------------|
| System | System Member | Department/SubDepartment | Account | Account Attribute | Department Reference Number |
| FAMIS | (15) Texas A&M Univ-Corpus Christi | (PURC) PROCUREMENT & DISBURSE | <input type="text"/> | <input type="text"/> | <input type="text"/> |

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

Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Trip Name/Destination:

Trip Purpose & Benefit:

Request Header Expenses Approval Flow Audit Trail

| | | | | | | |
|--|------------------------------------|--|-----------------------|-------------------|------------------------------|------------------|
| Trip Name/Destination? | Trip Start Date | Trip End Date | Travel Classification | Traveler Type | Student Travel Activity Type | Contracts/Grants |
| Houston, TX/ELongoria/10-1 | 10/01/2017 | 10/05/2017 | Employee-In State | Staff | | No |
| Trip Purpose & Benefit | Personal Travel Included? | Non-Employee/Student Traveler (Last Name, First Name)? | Notes | | | |
| Travel to Houston to attend Concur conference. | No | | | | | |
| Foreign Risk? | Foreign Country 1 | Foreign Country 2 | Foreign Country 3 | Foreign Country 4 | | |
| | | | | | | |
| System | System Member | Department/SubDepartment | Account | Account Attribute | Department Reference Number | |
| FAMIS | (15) Texas A&M Univ-Corpus Christi | (PURC) PROCUREMENT & DISBURSE | | | | |

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.

Traveler Classification and Type

When adding traveler classification and type, make sure the correct options are being used.

Commonly Used Classifications/Types:

- Employee-In State/Faculty or Staff
- Employee-Out of State/Faculty or Staff
- Student-Domestic Travel/Faculty with students or Staff with students (used when traveling w/students)
- Prospective Employee-Domestic/Non-employee
- Prospective Student/Staff (used for Recruiting trips)

If you are creating a 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.

Personal Travel: Please denote if the traveler is going to have any personal travel while on their trip. Select “Yes” or “No”.

Notes: This 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 (4xxxxx accounts).

Foreign Risk Acknowledgment and Foreign Country 1, 2, 3, 4

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 and 4: “Foreign 1” – select the first country; “Foreign 2, 3, 4” – select the second, third or fourth countries (if applicable) where traveler will visit.

Request FUXD

Trip Name/Destination: Houston, TX/ELongoria/10-1

Trip Purpose & Benefit: Travel to Houston to attend
Conc...

Request Header Expenses Approval Flow Audit Trail

| | | | | | | |
|---|--|--|--|-----------------------------|------------------------------|------------------------|
| Trip Name/Destination? Houston, TX/ELongoria/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 | Contracts/Grants No |
| Trip Purpose & Benefit Travel to Houston to attend Concur conference. | Personal Travel Included? No | Non-Employee/Student Traveler (Last Name, First Name)? | Notes | | | |
| Foreign Risk? Country(s) not under a warning Country(s) under US State Dept warning | Foreign Country 1 | Foreign Country 2 | Foreign Country 3 | Foreign Country 4 | | |
| System Member FAMIS | Department/SubDepartment (15) Texas A&M Univ-Corpus Christi | Account (PURC) PROCUREMENT & DISBURSE | Account Attribute | Department Reference Number | | |

Once you have filled out all the required fields hit Save



Request FUXD

Cancel Save Attachments Print / Email Delete Request Submit Request

Status: Not Submitted

Trip Name/Destination: Houston, TX/ELongoria/10-1

Trip Purpose & Benefit: Travel to Houston to attend Concur...

Request Header Expenses Approval Flow Audit Trail

Trip Name/Destination Houston, TX/ELongoria/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
Contracts/Grants No

Trip Purpose & Benefit
Travel to Houston to attend Concur conference.
Personal Travel Included? No
Non-Employee/Student Traveler (Last Name, First Name)
Notes

Foreign Risk
Foreign Country 1
Foreign Country 2
Foreign Country 3
Foreign Country 4

System FAMIS
System Member (15) Texas A&M Univ-Corpus Christi
Department/SubDepartment (PURC) PROCUREMENT & DISBURSE
Account
Account Attribute
Department Reference Number

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.

Encumber your Expenses

Request FUXD

[Attachments](#)
[Print / Email](#)
[Delete Request](#)
[Submit Request](#)

Status: Not Submitted

Trip Name/Destination: Houston, TX/ELongoria/10-1

Trip Purpose & Benefit: Travel to Houston to attend
Conc...

[Request Header](#)
[Expenses](#)
[Approval Flow](#)
[Audit Trail](#)

«

| <input type="checkbox"/> Date | Expense Type | Amount | Requested |
|-------------------------------|--------------|--------|-----------|
|-------------------------------|--------------|--------|-----------|

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- | | | |
|-----------------------|----------------------------|--------------------------------|
| Communications | Other | Transportation |
| Phone | Conference Registration | Airfare |
| Individual Meals | Dues | Airfare Ticket Tax |
| Business Meal | Educ Books < \$5k | Airline Fees |
| Business Meal-Alcohol | Gifts | Airline Ticket Change Fee |
| Meals | Incidentals | Boat |
| Meals-Non-Overnight | Internet | Bus/Shuttle |
| Lodging | Laundry | Car Rental |
| Hotel | Rental of Space | Gasoline |
| Hotel Tax | Services-Other than Travel | Limousine |
| Rent-Apartment/House | Supplies | Mileage Single Engine Aircraft |
| | Travel Agent Fees | Mileage Turbo Aircraft |
| | Personal Car - Mileage | Mileage Twin Engine Aircraft |
| | | Parking |
| | | Subway |
| | | Taxi |

| | |
|--------------|-----------------|
| TOTAL AMOUNT | TOTAL REQUESTED |
| \$0.00 | \$0.00 |

Higher Lodging

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

Attachments ▾ Print / Email ▾ Delete Request Submit Request

Status: Not Submitted

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

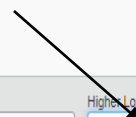
Request Header Expenses Approval Flow Audit Trail

+ New Expense

Delete

| <input type="checkbox"/> | Date | Expense Type | Amount | Requested |
|--------------------------|------|--------------|--------|-----------|
|--------------------------|------|--------------|--------|-----------|

| | | | |
|--------------------|------------------|-------------|--------------------------------|
| Expense Type | Transaction Date | Description | Higher Lodging Rate Requested? |
| Hotel | 10/01/2017 | | <input type="checkbox"/> |
| Transaction Amount | Comment | FAMIS REF-A | FAMIS REF-B |
| 0.00 USD | | | |



Attach Documents to your Request

Manage Requests New Request **Process Requests** Quick Search

Request TYHA

Trip Name/Destination:
Trip Purpose & Benefit:

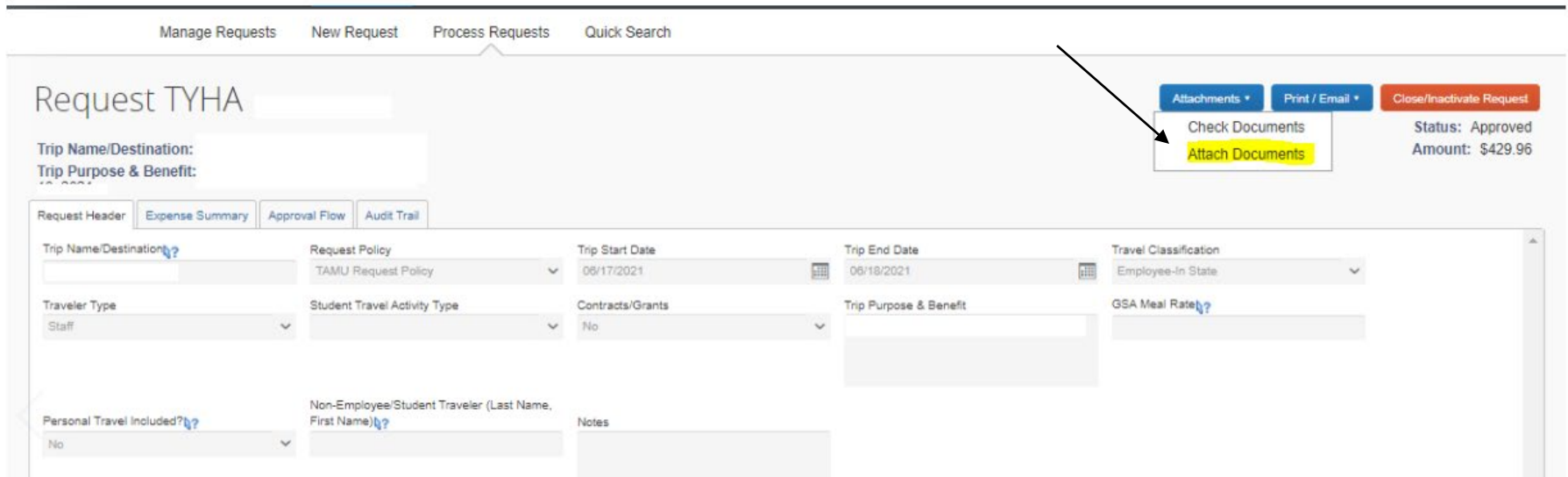
Request Header Expense Summary Approval Flow Audit Trail

| | | | | |
|---------------------------|---|-------------------------------|-----------------------------|--|
| Trip Name/Destination | Request Policy TAMU Request Policy | Trip Start Date 06/17/2021 | Trip End Date 06/18/2021 | Travel Classification Employee-In State |
| Traveler Type Staff | Student Travel Activity Type | Contracts/Grants No | Trip Purpose & Benefit | GSA Meal Rate |
| Personal Travel Included? | Non-Employee/Student Traveler (Last Name, First Name) | Notes | | |
| No | | | | |

Attachments * Print / Email * Close/Inactivate Request

Check Documents
Attach Documents

Status: Approved
Amount: \$429.96

The image shows a screenshot of a web application interface for managing requests. At the top, there are navigation tabs: 'Manage Requests', 'New Request', 'Process Requests' (which is active), and 'Quick Search'. Below this, the main content area is titled 'Request TYHA'. There are several input fields for 'Trip Name/Destination' and 'Trip Purpose & Benefit'. Below these are tabs for 'Request Header', 'Expense Summary', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is selected, showing a form with various fields: 'Trip Name/Destination', 'Request Policy' (set to 'TAMU Request Policy'), 'Trip Start Date' (06/17/2021), 'Trip End Date' (06/18/2021), 'Travel Classification' (Employee-In State), 'Traveler Type' (Staff), 'Student Travel Activity Type', 'Contracts/Grants' (No), 'Trip Purpose & Benefit', 'GSA Meal Rate', 'Personal Travel Included?' (No), 'Non-Employee/Student Traveler (Last Name, First Name)', and 'Notes'. In the top right corner, there are three buttons: 'Attachments *', 'Print / Email *', and 'Close/Inactivate Request'. A dropdown menu is open under 'Attachments *', showing 'Check Documents' and 'Attach Documents' (which is highlighted in yellow). An arrow points from the 'Process Requests' tab to this dropdown menu. To the right of the dropdown, the status is 'Status: Approved' and the amount is 'Amount: \$429.96'.

Submitting the request...

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

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

Request FUXD

Trip Name/Destination: Houston, TX/ELongoria/10-1

Trip Purpose & Benefit: Travel to Houston to attend
Conc...

Request Header Expenses Approval Flow Audit Trail

+ New Expense Delete <<

| Date | Expense Type | Amount | Requested |
|------|--------------|--------|-----------|
|------|--------------|--------|-----------|

Attachments Print / Email Delete Request **Submit Request**



Status: Not Submitted

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

| | | |
|----------------|-------------------------|----------------|
| Communications | Other | Transportation |
| Phone | Conference Registration | Airfare |

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 Conc...

Request Header | Expenses | **Approval Flow** | Audit Trail

| | |
|---|---|
| Trip Name/Destination? Houston, TX/ELongoria/10-1 | Trip Start Date 10/01/2017 |
| Trip Purpose & Benefit Travel to Houston to attend Concur conference. | Personal Travel Included?? No |

Audit Trail View

Request CJPP

Trip Name/Destination: Houston/Longoria/081016

Trip Purpose & Benefit: Travel to Houston to attend the

...

| | | | |
|----------------|-----------------|---------------|-------------|
| Request Header | Expense Summary | Approval Flow | Audit Trail |
|----------------|-----------------|---------------|-------------|

Request Level

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

Approval Flow

Request CJPP

Trip Name/Destination: Houston/Longoria/081016

Trip Purpose & Benefit: Travel to Houston to attend the

...

Request Header Expense Summary Approval Flow Audit Trail

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.

Now you have come back from your trip.....What to do next?

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 Concur, and select the Request tab

Locate approved request then click “Expense” under the “Action” column.

The Expense Report Header is displayed with the Travel Request attached.

Type in the correct account number.

Once you verify the information on the header, click “Next”.

The Expense Report Summary is displayed. Click “Import” add Citibank charges. Click “New Expense” to add out-of-pocket expenses.



Create a New Expense Report

Report Header

| | | | | |
|---|---|---|---|--|
| Destination Fort Worth, TX Conference | Trip Start Date 02/17/2015 | Trip End Date 02/18/2015 | Report Date 01/12/2015 | Policy FAMS |
| Purpose & Benefit Attend conference to present research and network with colleagues | Report Key | System Member (02) TEXAS A&M UNIVET | Department / Sub-Department (FISC OPS) FMO - ACCO | Account (210410 22000) FMO - A |
| Account Attributes (L) LOCAL | Personal Travel Included? No | Department Reference Number | Travel Classification Employee-in State | Student Travel Type |
| Notes | Auth. Request Encumbrance Release Final | Famis External VID | | |

GSA RATES

0.00

Requests

Add Remove

| Request Name | Request ID | Cancelled | Request Total | Amount Approved | Amount Remaining |
|---------------------------|------------|-----------|---------------|-----------------|------------------|
| Fort Worth, TX Conference | 67GP | No | \$0.00 | \$0.00 | \$0.00 |

Click Next

Next >> Cancel



Manage Expenses

View Transactions

Cash Advances

Fort Worth, TX Conference

Delete Report

Submit Report

[+ New Expense](#) [+ Quick Expenses](#) [Import](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses

[More](#) [Delete](#) [Copy](#) [View](#)

| <input type="checkbox"/> | Date | Expense | Amount | Requested |
|--------------------------|------|---------|--------|-----------|
|--------------------------|------|---------|--------|-----------|

Adding New Expense

No Expenses Found

New Expense

Available Receipts

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Meals
- Car Rental
- Parking
- Hotel
- Airfare


All Expense Types

- | | | |
|----------------------------|-------------------------------|--------------------------------|
| Communications | ...Other | ...Transportation |
| Phone | Dues | Airline Fees |
| Individual Meals | Educ Books < \$5k | Airline Ticket Change Fee |
| Business Meal | Gifts | Boat |
| Business Meal-Alcohol | Incidentals | Bus/Shuttle |
| Meals | Internet | Car Rental |
| Meals-Non-Overnight | Laundry | Gasoline |
| Sales Tax Charged in Error | Rental of Space | Limousine |
| Lodging | Services-Other than Travel | Mileage Single Engine Aircraft |
| Hotel | Supplies | Mileage Turbo Aircraft |
| Hotel Tax | Travel Agent Fees | Mileage Twin Engine Aircraft |
| Rent-Apartment/House | Personal Car - Mileage | Parking |
| Other | Personal Car Mileage | Subway |
| ATM Cash Withdrawal | Transportation | Taxi |
| Bank Fees | Airfare | Tolls |
| Conference Registration | Airfare Ticket Tax | Train |

| | |
|--------------|-----------------|
| TOTAL AMOUNT | TOTAL REQUESTED |
| \$0.00 | \$0.00 |

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)

Allocating Charges & Expenses

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

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.

If claiming mileage...

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 Texttravel.

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”

Missing a receipt!

| <input type="checkbox"/> | Date ▾ | Expense Type |
|-------------------------------------|---|-------------------------------------|
| <input type="checkbox"/> | 08/09/2017     | Hotel ALA MOANA HOTEL, Honolulu, |
| <input checked="" type="checkbox"/> | 08/08/2017    | Taxi SITTIPRON POONPIROM, Honc |

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.

Houston/Longoria/081116

[Copy Report](#)

[Summary](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses View

| Date | Expense Type | Amount | Approved |
|------------|--|----------|----------|
| 08/12/2016 | Car Rental ENTERPRISE RENT-A-CAR, Corpus | \$77.48 | \$77.48 |
| 08/11/2016 | Hotel HOTEL INDIGO, Houston, Texas | \$145.41 | \$145.41 |
| 08/11/2016 | Gasoline SHELL OIL 10003382008, El Campo | \$26.00 | \$26.00 |
| 08/11/2016 | Meals SHELL OIL 10003382008, El Campo | \$23.78 | \$23.78 |
| 08/11/2016 | Meals MARRIOTT JW HOUSTON F&, Hous | \$5.90 | \$5.90 |
| 08/11/2016 | Parking MARRIOTT JW HOUST PARK, Hous | \$18.40 | \$18.40 |
| 08/10/2016 | Meals SHELL OIL 10003382008, El Campo | \$12.31 | \$12.31 |
| 08/10/2016 | Meals MAGGIANOS HOUSTON, Houston, * | \$28.19 | \$28.19 |

TOTAL AMOUNT **\$337.47** TOTAL APPROVED **\$337.47**

Expense Receipt Image Available Receipts

| | | | | |
|--------------------------------------|--|---|--|--|
| Expense Type Car Rental | Transaction Date 08/12/2016 | Number of days the vehicle was rented <input type="text"/> | Business Purpose <input type="text"/> | Vendor Enterprise |
| Vendor Name ENTERPRISE RENT-A-CAR | City Corpus Christi, Texas | Payment Type Corporate Card Agency Liability | Amount 77.48 USD | <input type="checkbox"/> Personal Expense (do not reimburse) |
| Approved Amount 77.48 | Travel Classification Employee-In State | Clearing Account 15-000390 | FAMIS REF-A <input type="text"/> | FAMIS REF-B <input type="text"/> |

*TAM-Custom D6-Citi Corp Id
70230

Attendees Attendees: 0 | Attendee Total: \$0.00 | Remaining: **\$77.48**

[Create Group](#)

| <input type="checkbox"/> | Attendee Name | Attendee Title | Company | Attendee Type | Amount |
|--------------------------|---------------|----------------|---------|---------------|--------|
| <input type="checkbox"/> | | | | | |



[Attach Receipt](#)

Houston/Langoria/081116

Copy Report

Click to view report name and other details

Summary Details Receipts Print / Email

Expenses

| Date | Expense | Approved |
|------------|--|----------|
| 08/12/2016 | Car Rental ENTERPRISE RENT-A-CAR | \$77.48 |
| 08/11/2016 | Hotel HOTEL | \$145.41 |
| 08/11/2016 | Gasoline SHELL OIL 10003382008, El Campo | \$26.00 |
| 08/11/2016 | Meals SHELL OIL 10003382008, El Campo | \$23.78 |
| 08/11/2016 | Meals MARRIOTT JW HOUSTON F&, Hous | \$5.90 |
| 08/11/2016 | Parking MARRIOTT JW HOUST PARK, Hous | \$18.40 |
| 08/10/2016 | Meals SHELL OIL 10003382008, El Campo | \$12.31 |
| 08/10/2016 | Meals MAGGIANOS HOUSTON, Houston, | \$28.19 |

Receipts Required

- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images
- View Available Receipts



Expense
Receipt Image
Available Receipts

| | | | | |
|--------------------------------------|--|---|---------------------|--|
| Expense Type Car Rental | Transaction Date 08/12/2016 | Number of days the vehicle was rented | Business Purpose | Vendor Enterprise |
| Vendor Name ENTERPRISE RENT-A-CAR | City Corpus Christi, Texas | Payment Type Corporate Card Agency Liability | Amount 77.48 USD | <input type="checkbox"/> Personal Expense (do not reimburse) |
| Approved Amount 77.48 | Travel Classification Employee-In State | Clearing Account 15-000390 | FAMIS REF-A | FAMIS REF-B |

*TAM-Custom 06-Citi Corp Id
70230

Attendees

Create Group

| <input type="checkbox"/> | Attendee Name | Attendee Title | Company | Attendee Type | Amount |
|--------------------------|---------------|----------------|---------|---------------|--------|
| <input type="checkbox"/> | | | | | |

Attendees: 0 | Attendee Total: \$0.00 | Remaining: **\$77.48**

Click on "Browse",
search for receipt(s)
select "Attach",
"Upload" and then
"Close"

Houston/Longoria/081116

Summary Details Receipts Print / Email

Expenses

| Date | Expense Type | Amount | Approved |
|------------|---|----------|----------|
| 08/12/2016 | Car Rental ENTERPRISE RENT-A-CAR, Corpus | \$77.48 | \$77.48 |
| 08/11/2016 | Hotel HOTEL INDIGO, Houston, Texas | \$145.41 | \$145.41 |
| 08/11/2016 | Gasoline SHELL OIL 10003382008, El Campo | \$26.00 | \$26.00 |
| 08/11/2016 | Meals SHELL OIL 10003382008, El Campo | \$23.78 | \$23.78 |
| 08/11/2016 | Meals MARRIOTT JW HOUSTON F&, Hous | \$5.90 | \$5.90 |
| 08/11/2016 | Parking MARRIOTT JW HOUST PARK, Hous | \$18.40 | \$18.40 |
| 08/10/2016 | Meals SHELL OIL 10003382008, El Campo | \$12.31 | \$12.31 |
| 08/10/2016 | Meals MAGGIANOS HOUSTON, Houston, T | \$28.19 | \$28.19 |

TOTAL AMOUNT \$337.47
TOTAL APPROVED \$337.47

Attach Receipt

Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.

File Selected for uploading:

Browse...

Attach

No file selected

Or choose an image from your Available Receipts.

Available Receipts

Attach

Cancel

Copy Report

Available Receipts

Business Purpose

Vendor

Enterprise

Amount

USD

Personal Expense (do not reimburse)

Receipts REF-A

FAMIS REF-B

Attendees: 0 | Attendee Total: \$0.00 | Remaining: \$77.48

Attendee Title

Company

Attendee Type

Amount

Attach Receipt

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.

Houston/Longoria/081116

Copy Report

Summary Details Receipts Print / Email

Expenses

| Date | Expense | Approved |
|------------|--|----------|
| 08/12/2016 | Car Rental ENTERPRISE RENT-A-CAR | \$77.48 |
| 08/11/2016 | Hotel HOTEL | \$145.41 |
| 08/11/2016 | Gasoline SHELL OIL 10003382008, El Campo | \$26.00 |
| 08/11/2016 | Meals SHELL OIL 10003382008, El Campo | \$23.78 |
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| 08/11/2016 | Parking MARRIOTT JW HOUST PARK, Hous | \$18.40 |
| 08/10/2016 | Meals SHELL OIL 10003382008, El Campo | \$12.31 |
| 08/10/2016 | Meals MAGGIANOS HOUSTON, Houston, | \$28.19 |

Receipts Required

- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images
- View Available Receipts



Expense Receipt Image Available Receipts

| | | | | |
|-----------------------|-----------------------|---------------------------------------|------------------|--|
| Expense Type | Transaction Date | Number of days the vehicle was rented | Business Purpose | Vendor |
| Car Rental | 08/12/2016 | | | Enterprise |
| Vendor Name | City | Payment Type | Amount | <input type="checkbox"/> Personal Expense (do not reimburse) |
| ENTERPRISE RENT-A-CAR | Corpus Christi, Texas | Corporate Card Agency Liability | 77.48 USD | |
| Approved Amount | Travel Classification | Clearing Account | FAMIS REF-A | FAMIS REF-B |
| 77.48 | Employee-In State | 15-000390 | | |

*TAM-Custom 06-Citi Corp Id
70230

Attendees

Create Group

Attendees: 0 | Attendee Total: \$0.00 | Remaining: \$77.48

| Attendee Name | Attendee Title | Company | Attendee Type | Amount |
|---------------|----------------|---------|---------------|--------|
| | | | | |

Printing Detailed Report

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

Copy Report

Summary Details Receipts Print / Email

Expenses

| Date | Expense Type | | |
|------------|---|----------|----------|
| 08/12/2016 | Car Rental ENTERPRISE RENT-A-CAR | | |
| 08/11/2016 | Hotel HOTEL INDIGO, Houston, Texas | \$145.41 | \$145.41 |
| 08/11/2016 | Gasoline SHELL OIL 10003382008, El Campo | \$26.00 | \$26.00 |
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| 08/11/2016 | Meals MARRIOTT JW HOUSTON F&, Hous | \$5.90 | \$5.90 |
| 08/11/2016 | Parking MARRIOTT JW HOUST PARK, Hous | \$18.40 | \$18.40 |
| 08/10/2016 | Meals SHELL OIL 10003382008, El Campo | \$12.31 | \$12.31 |
| 08/10/2016 | Meals MAGGIANOS HOUSTON, Houston, Tex | \$28.19 | \$28.19 |

Texas A&M Fax Receipt Cover Page

Texas A&M Detailed Report

*Texas A&M Detailed Report w/ Allocation Summary

*Texas A&M Detailed Report w/ Alloc & Audit Detail

Receipt Image
Available Receipts

| | | | |
|--------------------------------------|---------------------------------------|---------------------------------|-------------|
| Transaction Date | Number of days the vehicle was rented | Business Purpose | Vendor |
| 08/12/2016 | | | Enterprise |
| Vendor Name | City | Payment Type | Amount |
| ENTERPRISE RENT-A-CAR | Corpus Christi, Texas | Corporate Card Agency Liability | 77.48 USD |
| Approved Amount | Travel Classification | Clearing Account | FAMIS REF-A |
| 77.48 | Employee-In State | 15-000390 | |
| *TAM-Custom D6-Citi Corp Id 70230 | | | |

Attendees

Create Group

| Attendee Name | Attendee Title | Company | Attendee Type | Amount |
|---------------|----------------|---------|---------------|--------|
| | | | | |

Attendees: 0 | Attendee Total: \$0.00 | Remaining: **\$77.48**



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

| Transaction Date | Expense Type | Vendor | Vendor Name | City | Payment Type | Amount | Account Code 1 | *FAM-Custom 03-FAMIS REF A | *TAM - Custom 01 - Travel Classification | Has Allocation |
|--|--------------|-----------|-------------|--------|---------------|----------|----------------|----------------------------|--|----------------|
| 11/19/2012 | Hotel | La Quinta | La Quinta | Austin | Out of Pocket | \$113.90 | | | In State | No |
| • 11/20/2012 | Hotel | La Quinta | La Quinta | Austin | Out of Pocket | \$108.00 | 3030 | | In State | No |
| Allocations : 100.00% (\$108.00) FAMIS-15-PURC-285523 00000-L | | | | | | | | | | |
| • 11/20/2012 | Hotel Tax | La Quinta | La Quinta | Austin | Out of Pocket | \$5.90 | 3025 | | 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.

Report Total : \$113.90
Personal Expenses : \$0.00
Total Amount Claimed : \$113.90
Amount Approved : \$113.90

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 you 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”

Delete Report

Submit Report

Print / Email ▾

Hide Exceptions



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.

New Expense

Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

| Meals | Hotel | Business Meal | Hotel Tax | Gasoline | |
|---|---|--|---|--|--|
| Communications Phone Individual Meals Business Meal Business Meal-Alcohol Meals Meals-Non-Overnight Sales Tax Charged in Error | Lodging Hotel Hotel Tax Rent-Apartment/House Other ATM Cash Withdrawal Bank Fees Conference Registration | ...Other Dues Educ Books < \$5k Gifts Incidentals Internet Laundry Rental of Space | ...Other Services-Other than Travel Supplies Travel Agent Fees Personal Car - Mileage Personal Car Mileage Transportation Airfare | ...Transportation Airfare Ticket Tax Airline Fees Airline Ticket Change Fee Boat Bus/Shuttle Car Rental Gasoline ...Transportation Tolls Train | ...Transportation Limousine Mileage Single Engine Aircraft Mileage Turbo Aircraft Mileage Twin Engine Aircraft Parking Subway Taxi |

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.

Print ▾

Attach Receipt Images

View Receipts

Expense Type

Date ▲

Amount



Accept & Submit

Cancel

Questions????



CONGRATULATIONS!!!!!!

You have successfully completed the Concur 101 Training

THANK YOU...