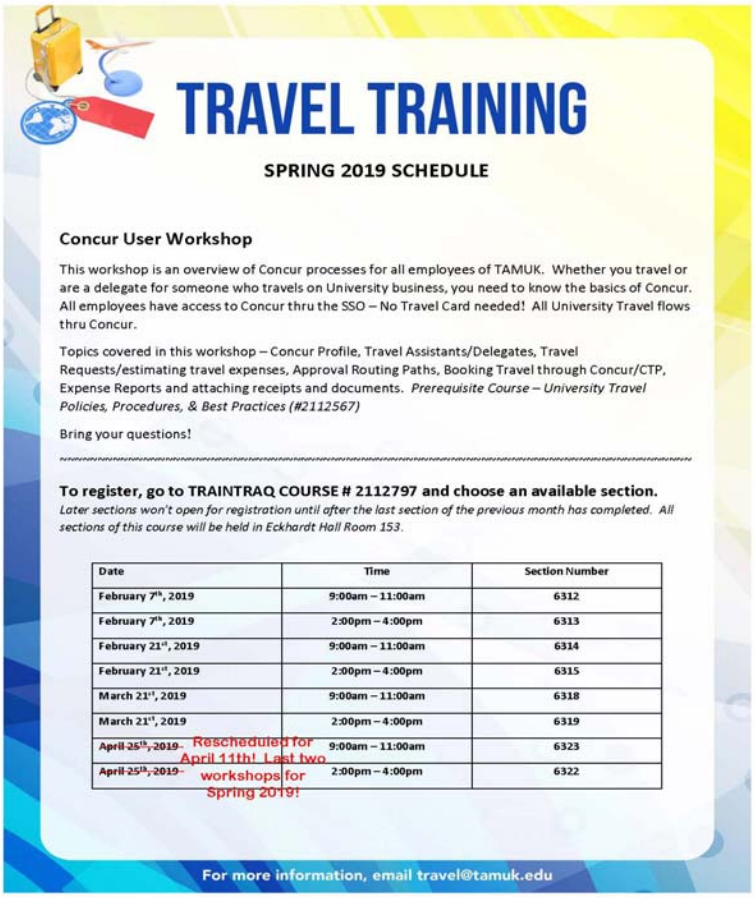
TAMUK TRAVEL UPDATE

APRIL 2019

Last two Concur User Workshops for Spring 2019 rescheduled for April 11, 2019!

- Due to the TAMUK Presidential Inauguration on April 25th, the Concur User Workshops have been rescheduled for April 11th. Same times – Same location! These are the last two Concur User Workshops scheduled for Spring 2019! See the attached flyer for more information.



TRAVEL TRAINING

SPRING 2019 SCHEDULE

Concur User Workshop

This workshop is an overview of Concur processes for all employees of TAMUK. Whether you travel or are a delegate for someone who travels on University business, you need to know the basics of Concur. All employees have access to Concur thru the SSO – No Travel Card needed! All University Travel flows thru Concur.

Topics covered in this workshop – Concur Profile, Travel Assistants/Delegates, Travel Requests/estimating travel expenses, Approval Routing Paths, Booking Travel through Concur/CTP, Expense Reports and attaching receipts and documents. *Prerequisite Course – University Travel Policies, Procedures, & Best Practices (#2112567)*

Bring your questions!

To register, go to TRAINTRAQ COURSE # 2112797 and choose an available section.
Later sections won't open for registration until after the last section of the previous month has completed. All sections of this course will be held in Eckhardt Hall Room 153.

Date	Time	Section Number
February 7th, 2019	9:00am – 11:00am	6312
February 7th, 2019	2:00pm – 4:00pm	6313
February 21st, 2019	9:00am – 11:00am	6314
February 21st, 2019	2:00pm – 4:00pm	6315
March 21st, 2019	9:00am – 11:00am	6318
March 21st, 2019	2:00pm – 4:00pm	6319
~~April 25th, 2019~~	9:00am – 11:00am	6323
~~April 25th, 2019~~	2:00pm – 4:00pm	6322

Rescheduled for April 11th! Last two workshops for Spring 2019!

For more information, email travel@tamuk.edu

Concur Mobile App now accommodates multi-page receipts

- You may now use Concur Mobile to capture multi-page receipt images. This is particularly useful for longer hotel stays, or payment card purchases with additional backup documentation. See the attached file for an illustration of how to capture multi-page receipt images within the app. Also, we'd like to remind everyone that Concur Mobile doesn't just capture the image for you. It also creates the expense. Simply capturing an image allows Concur to assign the travel expense type, date, vendor, amount, itemize hotel receipts, and match it up with your travel or payment card charge. Then it can automatically add the expense to your report. Using the mobile app will eliminate a lot of manual work involved in expense report creation, leading to faster submission and reimbursement times. Please contact travel@tamuk.edu or pcard@tamuk.edu, if you have any questions.

Concur Travel-Clery Act Data for Tracking Student Travel

- College Station UPD met with College Station FMO to discuss Clery Act reporting needs as it relates to student travel. Clery Act reporting requires tracking the specific hotels that students stay at. The information was available that students stayed at Holiday Inn in Austin, but information on the specific Holiday Inn they stayed at was not available. College Station FMO worked with Concur to develop some new functionality in order to capture this data in a way that we can report to UPD. Clery Act is universal across Higher Ed so all parts are reporting. The summary of the changes is attached.

If you have any questions on any of the above updates, please contact travel@tamuk.edu!

TRAVEL TRAINING

SPRING 2019 SCHEDULE

Concur User Workshop

This workshop is an overview of Concur processes for all employees of TAMUK. Whether you travel or are a delegate for someone who travels on University business, you need to know the basics of Concur. All employees have access to Concur thru the SSO – No Travel Card needed! All University Travel flows thru Concur.

Topics covered in this workshop – Concur Profile, Travel Assistants/Delegates, Travel Requests/estimating travel expenses, Approval Routing Paths, Booking Travel through Concur/CTP, Expense Reports and attaching receipts and documents. *Prerequisite Course – University Travel Policies, Procedures, & Best Practices (#2112567)*

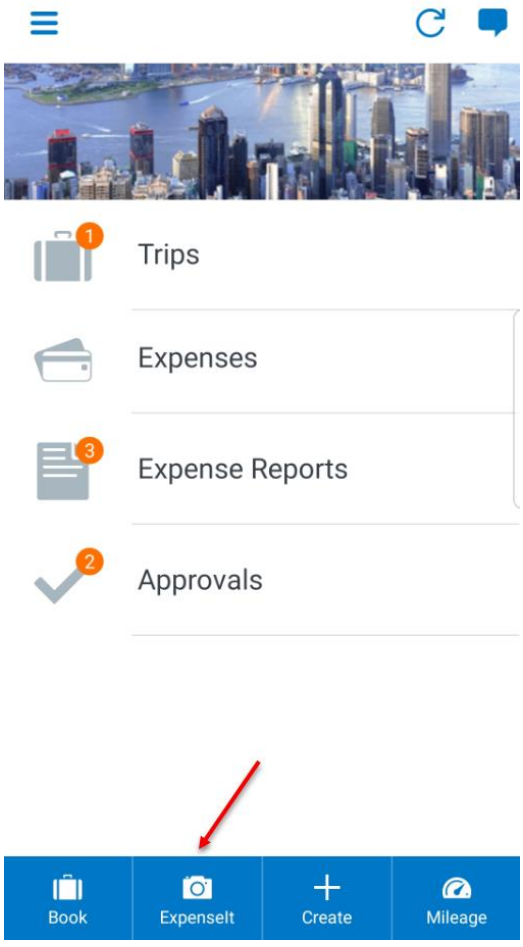
Bring your questions!

~~~
~~~

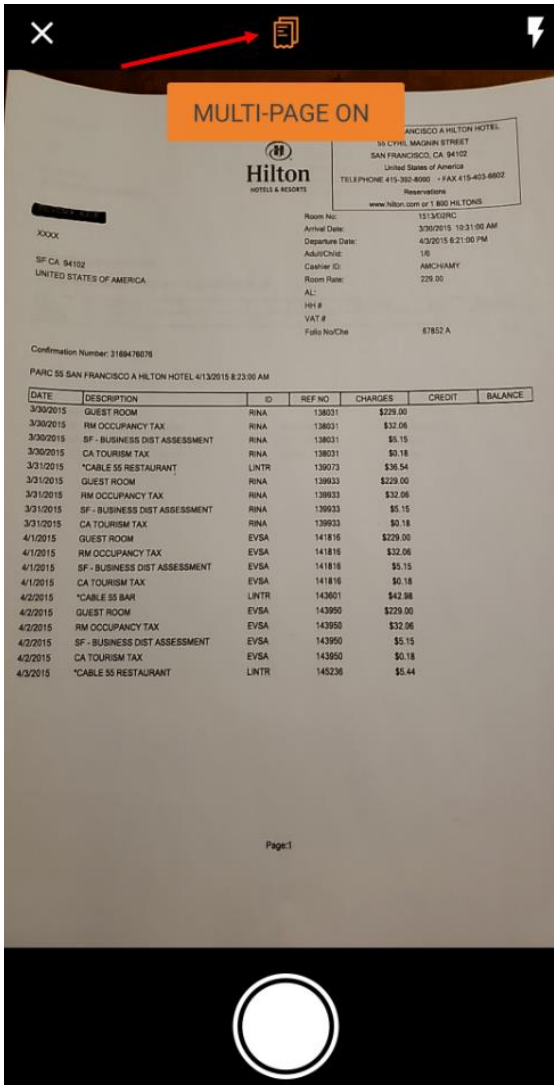
Using SAP Concur Mobile to Capture and Automatically Create Multi-Page Receipts

Using the ExpenseIt function within SAP Concur Mobile allows you to capture multi-page receipt images and have Concur automatically create the expense for you including hotel itemization.

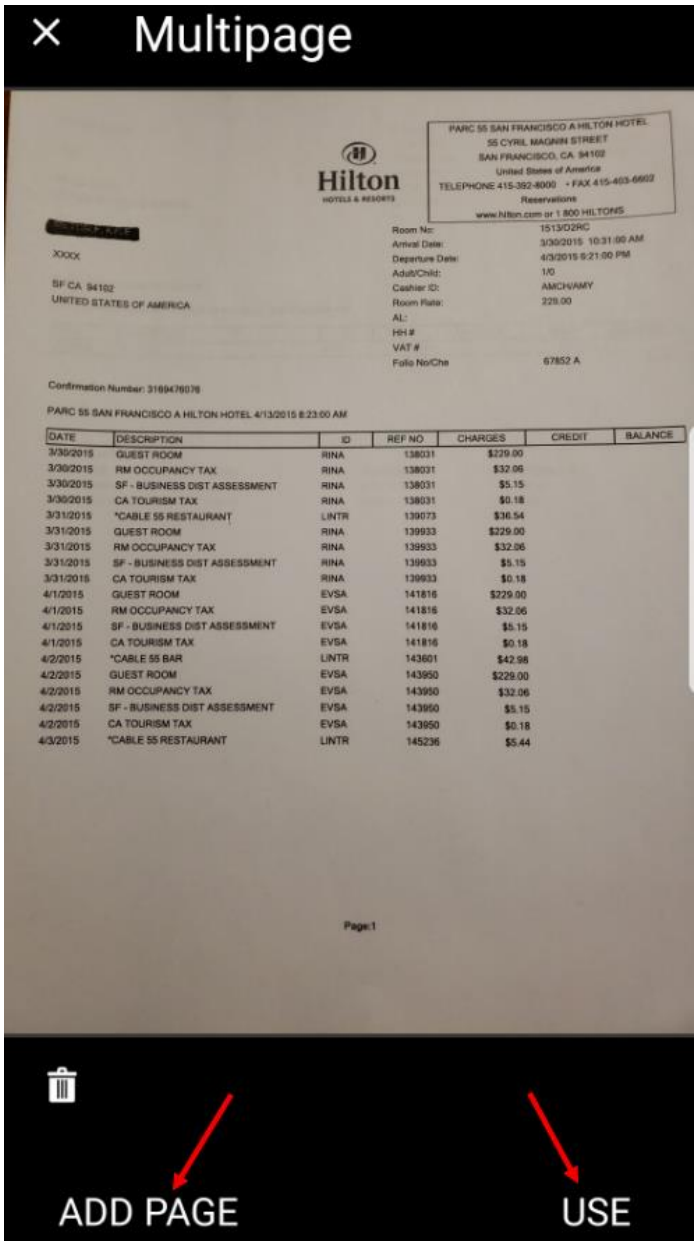
1. Open SAP Concur Mobile
2. Click the Camera button labeled ExpenseIt:



3. Click the Multi-page symbol at the top of the screen:



4. Press the button to capture the first page of the receipt
5. If the image is not acceptable click the trash can and retake the image
6. If the image is acceptable click “Add Page” to add an additional page to the receipt.
    a. Continue this process until all pages have been added
    b. Then click “Use”



7. Using the ExpenseIt function in SAP Concur Mobile allows expenses to be created automatically for you, eliminating manual work involved in creating your report.
    a. If the travel card is used for the expense Concur will match the receipt image up with the charge automatically for import onto your report.

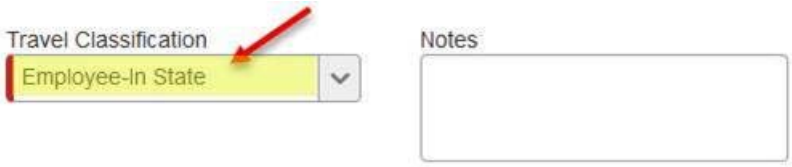
b. See below for the expense created for the example shown above. By simply taking an image within the app, Concur automatically itemized the hotel expense, eliminating the manual work involved in that process.

☑	04/03/2019	**Hotel** HILTON HOTEL, San Francisco,	$1,150.52	$1,150.52
☐	03/30/2019	Hotel	$229.00	$229.00
☐	03/30/2019	Hotel Tax	$0.18	$0.18
☐	03/30/2019	Hotel Tax	$5.15	$5.15
☐	03/30/2019	Hotel Tax	$32.06	$32.06
☐	03/31/2019	Hotel	$229.00	$229.00
☐	03/31/2019	Hotel Tax	$0.18	$0.18
☐	03/31/2019	Hotel Tax	$5.15	$5.15
☐	03/31/2019	Hotel Tax	$32.06	$32.06
☐	03/31/2019	Meals	$36.54	$36.54
☐	04/01/2019	Hotel	$229.00	$229.00
☐	04/01/2019	Hotel Tax	$0.18	$0.18
☐	04/01/2019	Hotel Tax	$5.15	$5.15
☐	04/01/2019	Hotel Tax	$32.06	$32.06
☐	04/02/2019	Hotel	$229.00	$229.00
☐	04/02/2019	Hotel Tax	$0.18	$0.18
☐	04/02/2019	Hotel Tax	$5.15	$5.15
☐	04/02/2019	Hotel Tax	$32.06	$32.06
☐	04/02/2019	Meals	$42.98	$42.98
☐	04/03/2019	Meals	$5.44	$5.44

Concur Travel-Clery Act Data for Tracking Student Travel

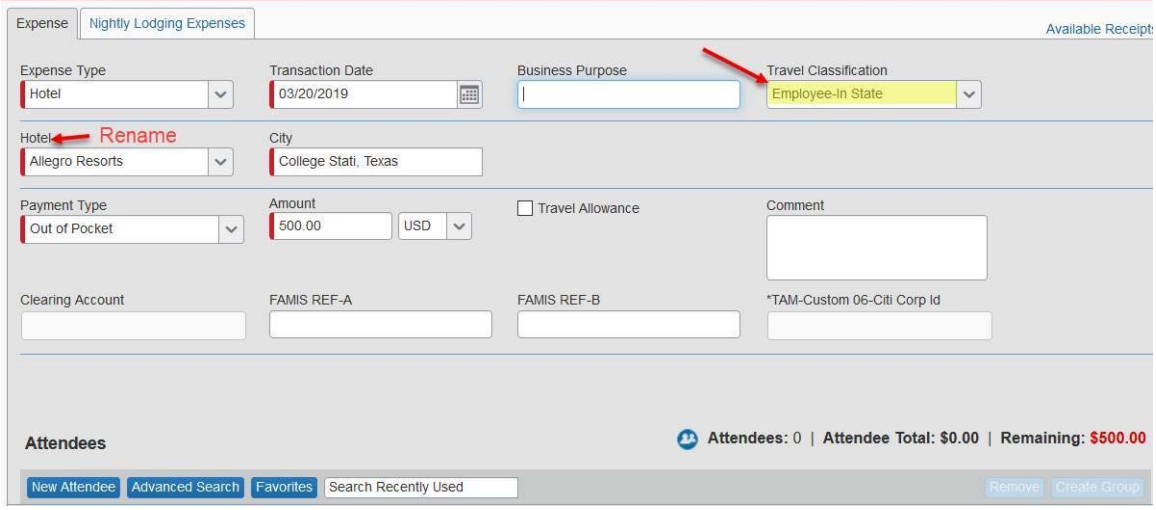
College Station UPD met with College Station FMO to discuss Clery Act reporting needs as it relates to student travel. Clery Act reporting requires tracking the specific hotels that students stay at. The information was available that students stayed at Holiday Inn in Austin, but information on the specific Holiday Inn they stayed at was not available. College Station FMO worked with Concur to develop some new functionality in order to capture this data in a way that we can report to UPD. Clery Act is universal across Higher Ed so all parts are reporting. The summary of the changes are illustrated below.

1. The header has one change. The Student Travel Type field is now conditional. It will only be displayed when the Travel Classification selected is either "Student-Domestic Travel" or "Student-Foreign Travel."
    a. Here, Classification is not a student classification so Student Travel Type field is not displayed:

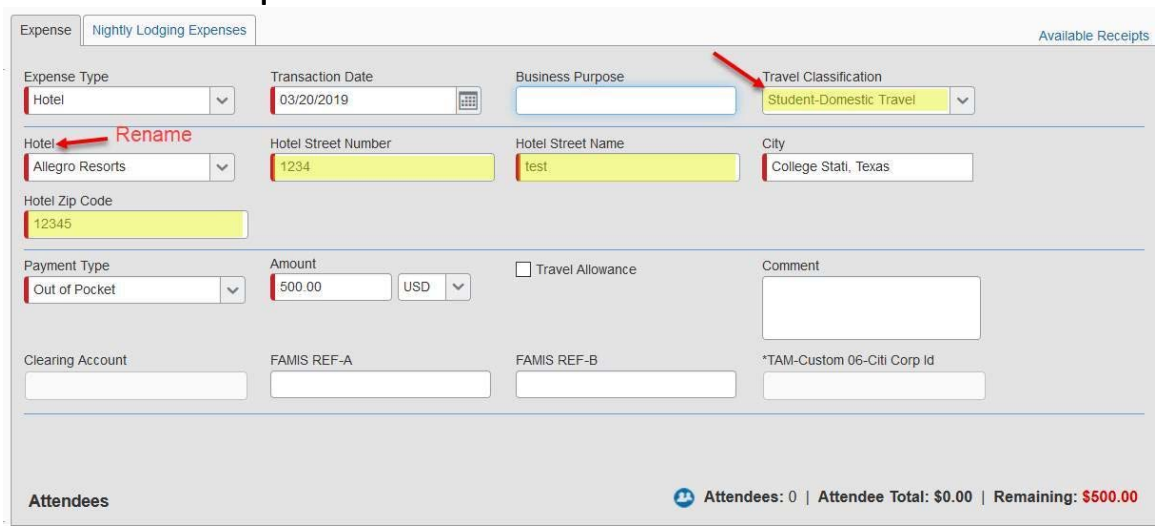


    b. Here, Classification IS a student travel classification so the Student Travel Type field is now displayed as a required field. Previously this was only required via an audit rule. Now they will have the red bar giving them a visual cue that it must be populated prior to saving the header:

2. The Hotel expense entry form now has conditional fields as well. Just like you're used to the travel classification copies down from the header, but it can be changed manually. If the classification chosen is not a student classification then the only change you'll notice is the renaming of "vendor" to "Hotel." Otherwise, it will look exactly like what you're used to:



3. **However, if the travel classification chosen IS student then you'll see additional fields below shown as required fields:**



   a. These additional required fields, Hotel Street Number, Hotel Street Name, and Hotel Zip Code is what is needed to comply with the Clery Act reporting requirements. These new fields will ONLY be displayed if a student classification is selected. They are free-text fields so it's incumbent on whoever's creating the expense to fill them out accurately.
   b. The data in these fields will be available to be pulled into a report that can be provided to your UPD office or whatever office is responsible for collecting and reporting for Clery Act.

If you have any questions, please contact travel@tamuk.edu!