

## 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 25<sup>th</sup>, the Concur User Workshops have been rescheduled for April 11<sup>th</sup>. Same times – Same location! These are the last two Concur User Workshops scheduled for Spring 2019! See the attached flyer for more information.



#### 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 multipage 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 <u>travel@tamuk.edu</u>!

# **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 7 <sup>th</sup> , 2019	9:00am – 11:00am	6312
February 7 <sup>th</sup> , 2019	2:00pm – 4:00pm	6313
February 21 <sup>st</sup> , 2019	9:00am – 11:00am	6314
February 21 <sup>st</sup> , 2019	2:00pm – 4:00pm	6315
March 21 <sup>st</sup> , 2019	9:00am – 11:00am	6318
March 21 <sup>st</sup> , 2019	2:00pm – 4:00pm	6319
April 25 <sup>th</sup> , 2019. Rescheduled 1 April 11th! Last	or 9:00am – 11:00am two	6323
April-25th,-2019- workshops fo	2:00pm – 4:00pm	6322
Spring 2019		

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

Using the Expenselt 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 Expenselt:



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

XXXX SFCA 94			on	United SI	unes of America	
XXXX SF CA SH		HOTELS & A	LISOATS T	ELEPHONE 415-392- Re	4000 +FAX-411 servetions	1403-6602
XXXXX SECA SH			Room No.	www.hilton.co	m or 1 800 HILTO 1513/02RC	2NS
SE CA SI			Arrivel Date:	atar	3/30/2015 19:3	1:00 AM
and the second s	SEC4 AND		AduitChid		1/0	
UNITED S	TATES OF AMERICA		Cashier ID: Room Rate:		AMCHEAMY 229.00	
			AL:			
			HH # VAT #			
			Folio No/Chi		67852 A	
Confirmatic	m Number: 3169476076					
PARC 55 S	AN FRANCISCO & HILTON HOTEL 4/13/2015	8:23:00 AM				
DATE	DESCRIPTION	10	REF NO	CHARGES	CREDIT	BALANCE
3/30/2015	GUEST ROOM	RINA	136031	\$229.00		
3/30/2015	SF - BUSINESS DIST ASSESSMENT	RINA	138031	\$5.15		
3/30/2015	CA TOURISM TAX	RINA	138031	\$0,18		
3/31/2015	*CABLE 55 RESTAURANT	LINTR	139073	\$36.54		
V31/2015	RM OCCUPANCY TAX	FINA	139933	\$32.06		
V31/2015	SF - BUSINESS DIST ASSESSMENT	RINA	139933	\$5.15		
/31/2015	CA TOURISM TAX	RINA	139933	\$0.18		
1/2015	GUEST HOOM RM OCCUPANCY TAX	EVSA	141815	\$32.06		
1/2015	SF - BUSINESS DIST ASSESSMENT	EVSA	141816	\$5.15		
1/2015	CA TOURISM TAX	EVSA	141816	\$0.18		
2/2015	CABLE 55 BAR	LINTR	143601	\$42.98		
2/2015	GUEST HOOM	EVSA	143950	\$32.06		
/2015	SF - BUSINESS DIST ASSESSMENT	EVSA	143950	\$5.15		
/2015	CA TOURISM TAX	EVSA	143950	\$0.18	61	
/2015	*CABLE 55 RESTAURANT	LINTR	145236	\$5.44	<b>C</b> ()	
		Page	a			
			-	-	-	-

- 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"

		•		PARC 55 BAN FRAN 55 CYRIL N BAN FRANCI Unnet St	ICISCO A HILTON HOTEL MONIN STREET SCO. CA \$4102 stee of America
		Hilto	n TE	LEPHONE 415-392-	8000 + FAX 415-403-6602
-		HOTELS & FERR		www.hiten.co	m or 1 800 HILTONS
XOOX			Room No: Arrival Date Departure Dat Adut/Child:	-	1513/02RC 3/30/2015 10:31:00 AM 4/3/2015 6/21:00 PM 1/0
SFCA St	102		Cashier ID:		AMCHUAMY
UNITED S	TATES OF AMERICA		Room Flata:		228,00
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DATE	DESCRIPTION	UL DI	REF NO.	CHARGES	CREDIT BALAN
3/30/2015	BM OCCUPANCY TAX	RINA	138031	\$32.06	
3/30/2015	SF - BUSINESS DIST ASSESSMENT	RINA	138031	\$5.15	
3/30/2015	CA TOURISM TAX	RINA	138031	\$0.18	
3/31/2015	CABLE SS RESTAURANT	LINTR	130073	\$30.54	
3/31/2015	RM OCCUPANCY TAX	BINA	139933	\$32.06	
3/31/2015	SF - BUSINESS DIST ASSESSMENT	RINA	139933	\$5.15	
3/31/2016	CA TOURISM TAX	RINA	139933	\$0.18	
4/1/2015	GUEST ROOM	EVSA	141816	\$229.00	
4/1/2015	RM OCCUPANCY TAX	EVSA	141816	\$32.06	
4/1/2015	CA TOURISM TAX	EVSA	141816	\$0.15	
4/2/2015	*CABLE 55 BAR	LINTR	143601	\$42.98	
4/2/2015	GUEST ROOM	EVSA	143950	\$229.00	
6/2/2015	RM OCCUPANCY TAX	EVSA	143950	\$32.06	
U2/2015	SF - BUSINESS DIST ASSESSMENT	EVSA	143950	\$5.15	
43/2015	*CABLE 55 RESTAURANT	LINTR	145236	\$5.44	
		Page.1			
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- 7. Using the Expenselt 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.

•	,	5		
<ul> <li></li> </ul>	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:

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 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:

Expense Nightly Lodging Expenses			Available Receipt
Expense Type Hotel	Transaction Date 03/20/2019	Business Purpose	Travel Classification Employee-In State
Hotel Rename	City College Stati, Texas		
Payment Type Out of Pocket	Amount 500.00 USD V	Travel Allowance	Comment
Clearing Account	FAMIS REF-A	FAMIS REF-B	*TAM-Custom 06-Citi Corp Id
		•	Mandaaas ()   Altendes Tatali \$2.00   Damaining: \$500.00
Attendees			ttendees: 0   Attendee Iotal: \$0.00   Remaining: \$500.00
New Attendee Advanced Search	Favorites Search Recently Used		

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

Expense	Nightly Lodging Expens	es		Available Receipt
Expense Hotel	Туре	Transaction Date 03/20/2019	Business Purpose	Travel Classification Student-Domestic Travel
Hotel	Resorts	Hotel Street Number 1234	Hotel Street Name	City College Stati, Texas
Hotel Zip	Code			
Payment Out of F	Type Pocket	Amount 500.00 USD V	Travel Allowance	Comment
Clearing	Account	FAMIS REF-A	FAMIS REF-B	*TAM-Custom 06-Citi Corp Id
Attend	lees		e	Attendees: 0   Attendee Total: \$0.00   Remaining: \$500.00

- 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!