

Texas A&M University-Kingsville Travel Services



JAG Update
January 24, 2019

Concur Travel – Travel Assistant Role Now Available in Expense Delegate Setup

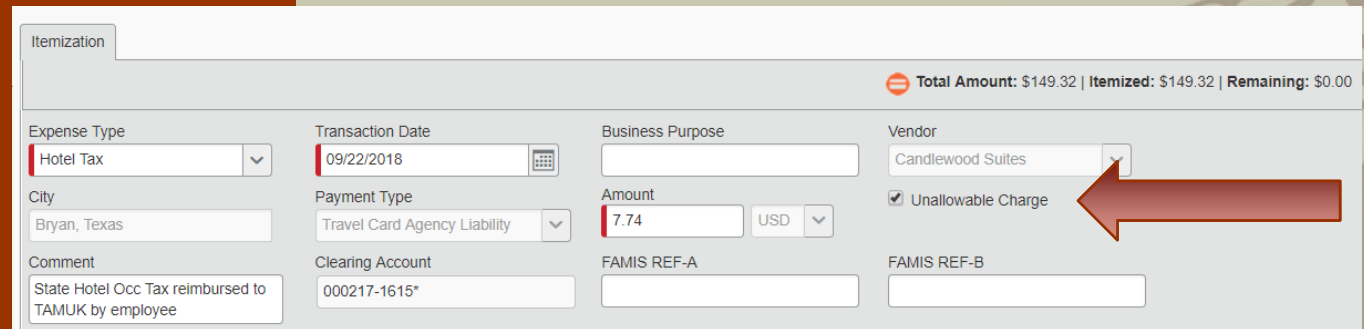
Users will no longer need to set up their travel assistants separately from their expense delegates. All permissions may be given on one screen now.

This screen is found by clicking Profile>Profile Settings>Expense Delegates. This should hopefully eliminate confusion caused by having to set each role up separately. This simplifies that process by putting it all on one screen.

Expense Delegates

Delegates		Delegate For			
		Add	Save	Delete	
Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning					
<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting
<input type="checkbox"/>	CHARGOIS, BRIDGETT bchargeois@tamu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CROCKER, EVONNE ecrocker@tamu.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	MCCLINTON, CARLETTA cmcclenton@tamu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	WILSON, BEVERLY bawilson@tamu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Concur – Renamed Personal Expense Checkbox



The screenshot shows the 'Itemization' form in Concur. At the top right, it displays 'Total Amount: \$149.32 | Itemized: \$149.32 | Remaining: \$0.00'. The form fields are as follows:

Expense Type Hotel Tax	Transaction Date 09/22/2018	Business Purpose	Vendor Candlewood Suites
City Bryan, Texas	Payment Type Travel Card Agency Liability	Amount 7.74 USD	<input checked="" type="checkbox"/> Unallowable Charge
Comment State Hotel Occ Tax reimbursed to TAMUK by employee	Clearing Account 000217-1615*	FAMIS REF-A	FAMIS REF-B

A red arrow points to the 'Unallowable Charge' checkbox, which is currently checked.

The “Personal” checkbox in Concur has been renamed to “Unallowable Charge.” The purpose for this change is to further reinforce that personal charges on travel cards are not allowed, and that personal charges should not be intentionally put on travel cards. Personal charges should be paid out of pocket. An example for when this could be used would be when a traveler unknowingly exceeds the GSA rate for a particular location. In this case, they’d need to mark any GSA overage as “Unallowable.”

This checkbox was intended to be rarely used, and only when it was truly unintentional or unavoidable. However, we’ve seen a steady increase in charges being marked as “Personal” where it appears it could’ve been easily avoidable. We want to avoid travelers becoming accustomed to using this feature, or misinterpreting the purpose of this checkbox and assuming that it’s ok to use the card for unallowable charges with the intent to pay it back later.

2019 Mileage Rate

Mileage incurred on or after January 1, 2019, will be reimbursed at the rate of \$.58 per mile for regular business travel, a 3.5 cent increase over 2018 rates. This rate is built into Concur and will be automatically applied.

However, continue to compare the cost of mileage vs rental vehicle for cost savings to the University. Depending on the amount of travel, rental vehicles are most likely more cost effective.





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

For more information, email travel@tamuk.edu

Questions?

Please let us know how we can assist you!

- Email us travel@tamuk.edu



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