Dean's Office Travel Guidelines

See guidelines below for Dean's office travel, prior to travel, during travel and after travel details listed below

Prior to Travel

1. Add Bryan Frugé as an **Expense Delegate.**
   a. Sign in to SSO.
   b. Select the "Concur."
   c. In Concur, select the "Profile" tab near the top right-hand corner of the page.
   d. Select the "Profile Settings" link in the pop-up box.
   e. On the next screen you'll see two columns of 7 blue links. You're going to select "Expense Delegates." It's the link in the right column, 3rd row from the bottom.
   f. Click the blue "Add" button, search "Bryan Frugé" and select.
   g. Check the following boxes:
      i. Can Prepare
      ii. Can View Receipts
      iii. Receives E-mails
      iv. Can Approve
      v. Receives Approval E-mails
   h. DO NOT check the "Can Approve Temporary" box, please!
   i. Click the blue "Save" box.

2. If you wish, meet with Bryan to **discuss upcoming trip**:
   803B-1 Harrington Tower
   979-458-1078
   cehdtravel@tamu.edu

3. Figure out the **GSA rate** (how much money you may spend on food at your destination) here:
   https://www.gsa.gov/travel/plan-book/per-diem-rates

4. Submit a **Travel Authorization.**
   a. Sign in to SSO.
   b. In the SSO Menu box, select the blue link for "Concur."
   c. In the top left corner of the next screen, click on the "Requests" tab.
   d. Select the smaller "New Request" just underneath the larger "Requests" tab.
   e. You are now creating a new Travel Request. You should be in the "Request Header" tab. Please fill out all the boxes with red left-hand borders.
      i. Trip Name/Destination: Acronym of conference / location (eg. "ACSM / San Diego, CA").
      ii. Travel Classification: "Employee-In State," "Employee- Out of State," or "Employee Foreign."
      iii. Traveler Type: "Faculty" or "Staff" as applicable.
      iv. Leave the Contracts/Grants box on the "No" option.
      v. In the Trip Purpose & Benefit box, be sure to put where you are going and why. How does it benefit A&M? If are attending a meeting or conference, type its full name. No acronyms, please.
      vi. System: "FAMIS."
      vii. System Member: "(02) TEXAS A&M UNIVERISTY."

viii. Department/SubDepartment: "CLED."
ix. The Account box: *leave blank*.

f. Next, click on the tab next to "Request Header" titled "Expenses. In this tab, you'll include a list of estimated expenses for the trip. These could include expenses such as conference registration, airfare, gas/mileage, hotel, meals, car rental, parking fees, taxi cab fare, etc. You get the idea.
g. At the top right corner of the screen, click on the orange "Submit Request" button.
h. You're done!

5. Check out **Travel Card**. If you don't have a travel card, please contact Bryan (contact info above).

6. Download **Concur app** on your phone and link it to your Concur profile (if you require assistance, Bryan can help with this as well). With this you can take a picture of your receipts and upload to Concur straight from your phone. Concur will analyze the receipt of auto-complete details like date of transaction, vendor, type of expense, and amount of expense. If you use this app, you won't have to keep track of physical receipts!

During Travel

1. **Keep receipts** for hotel, airfare, conference registration, organization membership, business meals with peers (not personal meals. I don't need a receipt for a $5 breakfast at McDonald's, for instance).

2. If not renting a vehicle (the recommended mode of auto travel), please **log mileage** traveled in your personal vehicle (date, from/to, why).

3. Log taxi/subway/train/bus travel (**from/to and why**).

4. Watch out for **State Occupancy Tax** on in-state hotels.

5. **DO NOT leave > 20% tips.** You will owe the University for the portion of the tip that exceeds 20%.

After Travel

1. As soon as possible, turn in all receipts, supporting documentation, and travel card to Bryan Frugé. If you forget, Bryan will touch base with you within 3 business days to remind you.

2. Bryan's goal will be to have your expense report ready for submission 10 business days after you turn in the above material. Please note: during peak business months, this timeline may be extended. If necessary, the business office will pre-emptively send out an e-mail stating the new, temporary timeline.

3. When your expense report is ready for submission, you will receive an e-mail from him notifying you, complete with instructions on how to submit your expense report.