

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, contact Bryan to discuss upcoming trip:
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 Request**.
 - 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. **Trip Start Date:** the day you depart College Station.
 - iii. **Trip End Date:** the day you return to College Station.
 - iv. **Travel Classification:** tons of options here, select the appropriate one.
 - v. **Traveler Type:** tons of options here, select the appropriate one.
 1. **NOTE:** if you are an undergraduate or graduate student traveling internationally, you *must* [register for international travel](#) with TAMU's Study Abroad Programs Office. Contact studyabroad@tamu.edu with further questions.
 - vi. **Student Travel Activity Type:** if traveling as a student, or with students, select the appropriate option.

- vii. **Contracts/Grants:** “No”
 - viii. **Trip Purpose & Benefit:** 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.
 - ix. **GSA Meal Rate:**
 - 1. For domestic travel, search your daily “Meals & Incidentals” (M&IE) rate [here](#).
 - 2. For international travel, search your daily M&IE rate [here](#).
 - x. **Personal Travel Included?** If you are planning to take some personal days at your destination, please indicate “yes” in the pull-down menu. Ensure that the Trip Start State and the Trip End Date encompass your personal travel days, not solely the business-related travel days.
 - xi. **Non-Employee/Student Traveler:** *rarely used*, except when traveling with and covering all the expenses of a non-employee or student. Student workers and Graduate Assistants are considered employees. If travel with non-A&M-employed spouse, leave this blank.
 - xii. **Foreign Country 1 – 4:** If foreign travel, select the country(s) to which you will be traveling, including personal travel.
 - xiii. **System:** “TRAVEL.”
 - xiv. **System Member:** “(02) TEXAS A&M UNIVERSITY.”
 - xv. **Department/SubDepartment:** “CLED.”
 - xvi. **Account:** *leave blank*.
- f. Next, click on the tab titled “Expenses” (located adjacent to the “Request Header” tab found in step 5). In this tab, you’ll include a list of estimated expenses for the trip. You don’t have to be on the nose with your estimations, but do keep in mind that your travel card will be raised in accordance with your estimated expenses, so be as thorough as possible. Expense could include, but are certainly not limited to:
- i. Airfare
 - ii. Lodging
 - iii. Conference registration
 - iv. Meals
 - v. Rental car (preferred method of vehicular transportation, but personal vehicle mileage reimbursement is also an option). See the attached “University Agency Travel Card Checklist” for Texas A&M University’s contract car rental codes for Avis, Enterprise/National, and Hertz to help you estimate expenses when checking prices on their website.
 - vi. Parking fees
 - vii. Taxi/subway/bus/shuttle
- g. At the top right corner of the screen, click on the orange “Submit Request” button.
- h. You’re done!
5. Verify that you have a **Concur-Verified e-mail address**. Here’s how to check:
- 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 on the far left-hand side, you’ll see a series of links under “Your Information.” Select the “Email Addresses” link.

- f. You'll see a table with your e-mail address(es). Is at least one of them marked with a green check mark and "verified"?
 - i. If so, you're done.
 - ii. If you do not, here's how to get your e-mail address verified:
 - a. Click the "Verify" link
 - b. Check that email address for a verification message from Concur.
 - c. Copy the code from the email message into the "Enter Code" box next to the Email address below.
 - d. Click "OK" to submit the code and complete verification.
6. If you haven't yet, **download the Concur app** on your phone and link it to your Concur profile. With this you can take a picture of your receipts and upload to Concur straight from your phone. Concur will analyze the receipt and auto-fill 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 the trip! Here's how:
 - 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 "Concur Mobile Registration." It's the link in the left column, bottom row.
 - f. Enter your verified e-mail and click "Get Started."
7. The day before your trip, **check out your Travel Card**. You will be e-mailed a code that you will use to gain access to a lockbox in the elevator bank of the 8th floor of Harrington Tower.

During Travel

1. **Save receipts.** If exclusively using your University-paid travel card, I'm most likely only need 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). If you make an **out-of-pocket purchase** and want reimbursement, you **must have an itemized receipt** documenting the expense. Here's how to save them, in order of preference:
 - a. Use your Concur app from step 6 above to snap pictures of the receipts and upload them into your Concur profile.
 - b. Snap a picture of them using your phone's camera.
 - c. Save the physical copies.
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. Turn in travel card via the locked drop box in the elevator bank on the 8th floor in Harrington Tower.

2. If you did not upload your receipts via the Concur app during travel, upload receipts via one of the methods listed below (in order of preference):
 - a. E-mail the pictures of the receipts on your phone from your Concur verified e-mail to receipts@expenseit.com. They'll pop up in your Concur profile.
 - b. Alternatively to number a. above, you may scan your receipts as one large pdf file and e-mail it from your Concur verified e-mail to receipts@expenseit.com.
 - c. Scan and email them to me at cehdtravel@tamu.edu.
 - d. Please do **NOT** bring the physical copies to me as I am no longer accepting them. I'd rather have a digital copy and you keep the physical in case something happens to my digital one.
3. 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.
4. 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.