eTravel Training

eTravel/Concur

Brandi Gilbert - Accounts Payable - Travel
Our Relation to State Guidelines

- Texas A &M System
- State
Travel for Tarleton State University follows the guidelines of the State of Texas and that of the Texas A&M University System.

What to think about before traveling:

- Lodging Rates
- Meal Allowances
- Mileage rate ($0.58 per mile)
- Contracted Vendors
- Allowable Incidentals
  - [http://www.window.state.tx.us/procurement/prog/stmp/](http://www.window.state.tx.tx.us/procurement/prog/stmp/)
First Things First – SSO Menu

- Access eTravel by logging into the Single Sign On (SSO) screen
- You will need your UIN & password
- Click Concur to access the program
Main Page of Concur

Hello, ASHLEY

TRIP SEARCH

COMPANY NOTES

Not possible to book Trainline on new UX

The below message is only shown to the Travel Policy Administrators at your company. Due to technical problems, Trainline bookings are currently failing on the new UX. We appreciate your patience while we work together with our Development team to resolve this issue as quickly as possible.

MY TASKS

00 Required Approvals
Great! You currently have no approvals.

00 Available Expenses

00 Open Reports
You currently have no active reports.
Create a Travel Request

Replaced Authorization Requests

Needed for all foreign travel

Click on the Request Tab

New Request
Create a Foreign Travel Request

• Fill in the required fields (red lined) and hit save.

• A request must be entered in Concur before traveling Foreign. The request is then routed through TAMU as well as Tarleton’s Risk Management.

• (The expense tab is where you will choose categories to estimate your expenses if you wish.)

Click “Save” when completed.
Creating a Foreign Travel Request
(Estimate Expenses on TR)
(Needs if department requires an encumbrance of funds.
Always submit one dollar for routing approval)

1. Click New Expense
2. Choose a category: Lodging, Meals, Transportation, Other
Foreign Travel

(Setting Additional Approvers on TR)

New to TR- if you would like to add additional approvals such as primary manager, you can do this here.

Travelers MUST submit their OWN reports!

Click Submit OR Notify Employee
Create a Foreign Request
(Where did it go?, Lets Review)

• Once approved, it will remain in your Active Work queue until you have completed your trip and submit an Expense Report for reimbursement.
TRAVEL

Not possible to book Trainline on new UX

Welcome to Tarleton State University eTravel

Tarleton State University eTravel Website

If you would like your travel reimbursement direct deposited into your bank account, please complete this form: AP ACH FORM

Current Travel Warnings: United States Department of State Current Travel Warnings

Meal & Lodging rates: GSA Rates

Currency Converter: OANDA.COM

Shorts Travel may be contacted at 877-225-0239, or more information may be found here.

If you need assistance, please click here and contact the appropriate office.

NOTICE: All Enterprise car rentals will continue to be processed through the Transportation Office. Please contact Joyce Daniels, Transportation Office Website: http://www.tarleton.edu/facilities/index.html
Book Travel

(Using Concur to book travel)

• The concur booking tool works much like Travelocity, Expedia, and Orbitz
• Enter your trip itinerary to book airfare, reserve hotel, and reserve rental vehicles.
• Or you may check outside of Concur for traveling prices. Remember, it should be the less cost to the state.
Book Travel
(Using Concur to book travel)

- Departure and Arrival airport locations
- Do you want a rental car?
- Find a Hotel?
If it is not in compliance there will be a yellow caution sign. The request will then be sent for approval before purchase.
Book Travel
(Choosing Airfare)

This box will pop up if you choose to reserve a yellow flight. You will choose a reason for booking the non-compliant flight and add a note if applicable.
Book Travel (Choosing Airfare)

Airfare is priced first at non-refundable rates. For refundable rates click the "Refundable only air fares checkbox".
Book Travel (Choosing Car Rental)

If traveling with multiple people, please be sure to coordinate schedules, this is due to the 4:1 ratio by State of Texas.
## Booking Car Rentals In Concur

Choosing your car rental is very similar to booking your airfare.

<table>
<thead>
<tr>
<th>Car Vendor</th>
<th>Model</th>
<th>Price</th>
<th>Additional Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise</td>
<td>Standard SUV</td>
<td>$115.35</td>
<td>Automatic transmission, Unlimited miles, Pick up: Terminal MSY, Adults: 6, Large bags: 3, Small bags: 3**</td>
</tr>
<tr>
<td>Budget</td>
<td>Standard SUV</td>
<td>$146.56</td>
<td>Automatic transmission, Unlimited miles, Pick up: Terminal MSY, Adults: 6, Large bags: 3, Small bags: 3**</td>
</tr>
<tr>
<td>National</td>
<td>Standard SUV</td>
<td>$173.93</td>
<td>Automatic transmission, Unlimited miles, Pick up: Terminal MSY, Adults: 6, Large bags: 3, Small bags: 3**</td>
</tr>
</tbody>
</table>

*Preferred Car Vendor for Texas A&M University System / E-Receipt Enabled*
Booking a Hotel in Concur
When choosing a hotel, input the location and the next screen will show you the maximum allowances for your destination. Click next to choose your hotel.
Notice the maximum allowed at the top of your list again.

If not in compliance a yellow caution sign will be displayed and the selection will be sent for approval.
Finalizing Reservations
(How to pay)

• Follow the prompts once choosing your travel details.
• **ALL** airfare booked through the system has to be booked with the individual’s travel card.
• You will need to use your Travel Card to reserve hotel rooms and rental cars. If you do not have a Travel Card, visit the Business Services website for Travel Card options.
http://www.tarleton.edu/business/facultystaff/travel-credit-cards.html
Expense Reports
(What is required)

• Create a new expense for every field you are claiming. (list meals separately by day)
• Use the mileage calculator for miles driven
• Hotel claims should be itemized by lodging rate and by hotel tax for each day. (this can be done with the “nightly lodging expense” tab)
Expense Reports
(What is required)

- Make sure you’ve scanned and uploaded all your receipts to your computer.
Creating Expense Reports

Click on *Create New Report* to create a new report. Make sure to select **travel** in the policy box.

Fill out all information with Red Line and then select next.
Expense Reports (Required)

If you have booked airfare and had it prepaid by the University, you should see these card charges on your “My Concur” page. Click the airfare and agent fee and “import” them to your expense report when you are ready to submit it for reimbursement. Don’t worry, concur recognizes it as company paid and will not reimburse the employee for the airfare. However, this is a necessary step in order to “repay” the clearing account that paid for your airfare.

Don’t forget the fee!
Expense Reports
(Example if Corporate Card Charges are on Concur page)

Select the expenses for the trip and “import” the charges to the expense report. Once the charges are added, you can attach receipts.
Creating and Expense Report

Select appropriate Expense Type and fill in all items with a red line.
Expense Reports
(Submission)

• Once you’ve gotten all your claims added and the required receipts attached, you are ready to click the submit button. You’ll find it at the top right of your expense report.

  • If you are creating one for another traveler then you will see the “notify employee” button.

• It will then route to the appropriate account owners for approval before arriving in Business Services for processing.
For Approvers

Notice there are options for Requests and Expenses. When there are approvals waiting your review, there will be a number (see Trip for example), click on box to see information.
Who Can submit reports?

The Traveler!!

The Traveler’s submission is their electronic signature.
What goes on my report?

YOUR expenses only! (make sure receipts are in your name)

NOT OTHER PEOPLE’S EXPENSES

Do not pay for another employee’s travel expenses. If you do, it will be between you and the other traveler to personally work out what is owed back to you.
Q&A (exceptions)

• **What about conference hotels?** Continue booking them as you have in the past – outside the system. Concur does not have access to conference rates.

• **Do I have to use the system to book my travel?** No, you can book on your own as you have in the past. Receipts are still required as have been.
Helpful Information regarding Travel
Find forms and other traveler information on Business Services website.

Meals and Lodging

Meal and lodging rates differ for in-state and out-of-state travel. State travel expense reimbursement is not a per diem. An employee must claim the actual expenses incurred for meals and lodging not to exceed the maximum allowable rates. The maximum should not be claimed unless the actual expenditures equal or exceed the maximum allowable rate. The reimbursement limit applies without a carry-over from another day. Texas Administrative Code, Title 34, Part 1, Chapter 5, Subchapter C, Section 5.22.

Concur

Concur/eTravel Forms and Information

- Travel Card Application
- Mileage vs. Airfare Justification (used when driving out of state)
- Point to Point Travel Request
- Hotel Tax Exempt Form
- Individual Concur Information Sheet (see instructions)
- Instructions for entering Individuals in Concur
- Travel Expense Checklist
- Motor Vehicle Rental Tax Exemption Form
Texas A&M YouTube Page
https://www.youtube.com/channel/UCsLdElrRqz2SFYxjcz7CXA
Support

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