

How to Create a Foreign Request

1. To create a new foreign travel request hover over the new tile, select start a request.


The screenshot shows the SAP Concur home page for The Texas A&M University System. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. A 'New' tile with a plus sign is highlighted with a red arrow, and a dropdown menu is open, listing options: 'Start a Request', 'Start a Report', 'New Cash Advance', 'Enter New Reservation', and 'Upload Receipts'. The dashboard features several tiles: '00 Required Approvals', '03 Authorization Requests', '10 Available Expenses', '05 Open Reports', and '00 Cash Advances'. Below these are sections for 'TRIP SEARCH' (with a flight search form), 'COMPANY NOT' (with a 'Welcome to Concur' message), and 'MY TASKS' (listing tasks like '00 Required Approvals', '10 Available Expenses', and '05 Open Reports').

2. This will create a blank request header, all required fields will be marked with red and must be populated before you can continue with request creation.

The screenshot shows the 'Create New Request' form. The form is titled 'Create New Request' and has a close button (X) in the top right corner. The form contains several fields, many of which are marked with a red asterisk (*) to indicate they are required. The fields are: 'Trip Name/Destination', 'Trip Start Date', 'Trip End Date', 'Travel Classification', 'Traveler Type', 'Student Travel Activity Type', 'Contracts/Grants', 'Trip Purpose & Benefit', 'GSA Meal Rate', 'Personal Travel Included?', 'Non-Employee/Student Traveler (Last Name, First Name)', 'Foreign Country 1', 'Foreign Country 2', 'Foreign Country 3', 'Foreign Country 4', 'System', 'System Member', 'Department/SubDepartment', 'Account', 'Account Attribute', and 'Department Reference Number'. The 'Notes' field is a large text area at the bottom. The form is set against a light gray background with a white border.

- In the field labeled destination, provide the location where the trip will occur. Some users will also add a conference name or even dates in this field to help them identify their request in their list of requests.

Create New Request

Trip Name/Destination * 

Trip Start Date * MM/DD/YYYY

Trip End Date * MM/DD/YYYY * Required field

Travel Classification * None Selected

Traveler Type * None Selected

Student Travel Activity Type None Selected

Contracts/Grants * No

Trip Purpose & Benefit *

GSA Meal Rate

Personal Travel Included? No

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account Attribute

Department Reference Number


Notes


Cancel Create Request

- Next, provide your trip start date and trip end date.

Create New Request

Trip Name/Destination *

Trip Start Date * MM/DD/YYYY 

Trip End Date * MM/DD/YYYY  * Required field

Travel Classification * None Selected

Traveler Type * None Selected

Student Travel Activity Type None Selected

Contracts/Grants * No

Trip Purpose & Benefit *

GSA Meal Rate

Personal Travel Included? No

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account Attribute

Department Reference Number

Notes

Cancel Create Request


- Use the travel classification field to indicate what type of travel this trip will be. Select the appropriate traveler type.


Create New Request

Trip Name/Destination * TEST

Trip Start Date * 05/25/2022

Trip End Date * 05/28/2022 * Required field

Travel Classification *  Employee-In State

Traveler Type *  None Selected

Student Travel Activity Type None Selected

Contracts/Grants * No

Trip Purpose & Benefit *

GSA Meal Rate

Personal Travel Included? No

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account Attribute

Department Reference Number

Notes

Cancel Create Request

type.

- The contracts/ grants field will default to no, this field is only used by some agencies and universities. Inquire with your department's travel or business to verify if this field is used by your agency or university.

Create New Request

Trip Name/Destination * TEST

Trip Start Date * 05/25/2022

Trip End Date * 05/28/2022

Travel Classification * Employee-In State

Traveler Type * None Selected

Student Travel Activity Type * None Selected

Contracts/Grants * No

Trip Purpose & Benefit *

GSA Meal Rate *

Personal Travel Included? *

Non-Employee/Student Traveler (Last Name, First Name)

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account

Account Attribute

Department Reference Number

Notes

Cancel Create Request

- Next enter the purpose and benefit of the trip. This should contain a detailed description of why the trip will occur such as a description of research conducted, or the name of the conference being attended. There should also be a description of how the trip benefits your system, agency, or university. This field is limited to 500

Edit Request Header

Request ID: X3FK

Trip Name/Destination * TEST

Trip Start Date * 05/25/2022

Trip End Date * 05/28/2022

Travel Classification * Employee-In State

Traveler Type * Staff

Student Travel Activity Type * None Selected

Contracts/Grants * No

Trip Purpose & Benefit * I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with

GSA Meal Rate *

Personal Travel Included? *

Non-Employee/Student Traveler (Last Name, First Name)

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account

Account Attribute

Department Reference Number

Notes

Cancel Save

characters.

- If personal travel is included, it may be marked yes, and you should provide a note indicating which days of the trip were personal.

Create New Request

Trip Name/Destination *

Trip Start Date * MM/DD/YYYY

Trip End Date * MM/DD/YYYY

Travel Classification * None Selected

Traveler Type * None Selected

Student Travel Activity Type * None Selected

Contracts/Grants * No

Trip Purpose & Benefit *

GSA Meal Rate *

Personal Travel Included? *

Non-Employee/Student Traveler (Last Name, First Name)

Foreign Country 1

Foreign Country 2

Foreign Country 3

Foreign Country 4

System * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account

Account Attribute

Department Reference Number

Notes

Cancel Create Request

9. If the request is for a non-employee or a student traveler enter their name in this field. The name should be entered last name first, first name.

Create New Request

The screenshot shows a web form for creating a new request. It is divided into three columns. The first column contains fields for Trip Name/Destination, Travel Classification (None Selected), Contracts/Grants (No), Non-Employee/Student Traveler (Last Name, First Name), Foreign Country 3, System Member ((02) TEXAS A&M UNIVERSITY), and Account Attribute. The second column contains Trip Start Date (MM/DD/YYYY), Traveler Type (None Selected), Trip Purpose & Benefit, Foreign Country 1, Foreign Country 4, Department/SubDepartment, and Department Reference Number. The third column contains Trip End Date (MM/DD/YYYY), Student Travel Activity Type (None Selected), GSA Meal Rate, Personal Travel Included? (No), Foreign Country 2, System (TRAVEL), and Account. A red arrow points to the 'Non-Employee/Student Traveler' field.

10. In the foreign country fields enter the country you will be traveling to. You may enter up to 4 different countries. If you have more than 4 countries, you may enter the additional countries in the notes field. Foreign countries in this field help determine if these countries need additional routing through Texas A&Ms system risk management is required.

Create New Request

This screenshot is identical to the previous one, but with yellow highlights on the 'Foreign Country 1', 'Foreign Country 2', 'Foreign Country 3', and 'Foreign Country 4' dropdown menus. At the bottom of the form, there is a 'Notes' field and two buttons: 'Cancel' and 'Create Request'.

11. The next four required fields tell the system what account is paying for this travel. These lists are connected. Whatever value you choose in each list will filter and limit the values available to select in the subsequent lists. The values in the fields may be defaulted, if your travel will always be funded from the same account, please go

to the expense information section in your profile settings and save your accounting information there. Once done, the system will automatically populate your account information each time you create an expense report, and you will not need to manually have to select each time.

Edit Request Header
Request ID: X3FK

TEST 05/25/2022 05/28/2022

Travel Classification * Employee-In State
 Traveler Type * Staff
 Student Travel Activity Type None Selected

Contracts/Grants * No
 Trip Purpose & Benefit * I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with
 GSA Meal Rate

Personal Travel Included? No

Non-Employee/Student Traveler (Last Name, First Name)
 Foreign Country 1 Search by Text
 Foreign Country 2 Search by Text
 Foreign Country 3 Search by Text
 Foreign Country 4 Search by Text

System Member * (02) TEXAS A&M UNIVERSITY
 Department/SubDepartment * fsc
 Department (FISC) FINANCIAL MANAGEMENT OPERATIONS
 (FISC) CLEAR FMO - CLEARING ACCOUNT
 (FISC) EPRY FINANCIAL MANAGEMENT OPERATIONS - EPRY
 (FISC) FMO FINANCIAL MANAGEMENT OPERATIONS
 (FISC) OPS FMO - ACCOUNTING OPERATIONS
 (FISC) UTIL FINANCIAL MANAGEMENT OPS - UTILITIES

Account Attribute (S) STATE
 Account TRAVEL
 Account () FMO - ACCOUNTING OPERATIONS

Notes (S) STATE

Cancel Save

- The first field to populate is system member. This should be the Texas A&M member that owns the account that is paying for your travel. The next field is the department and sub department where the account belongs. The next field is the account number, again as this series of fields is connected the account numbers displayed will only be accounts that belong with the department and sub departments that are specified in the previous field. The next field is labeled account attributes, there should only be one selection here based on the account chosen on the previous field. The account tells the system which rules are set to apply such as state, local or SRS funds. If you select an account number, you must complete this field. If an account number is not entered, then this field may be omitted.

Edit Request Header
Request ID: X3FK

TEST 05/25/2022 05/28/2022

Travel Classification * Employee-In State
 Traveler Type * Staff
 Student Travel Activity Type None Selected

Contracts/Grants * No
 Trip Purpose & Benefit * I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with
 GSA Meal Rate

Personal Travel Included? No

Non-Employee/Student Traveler (Last Name, First Name)
 Foreign Country 1 Search by Text
 Foreign Country 2 Search by Text
 Foreign Country 3 Search by Text
 Foreign Country 4 Search by Text

System Member * (02) TEXAS A&M UNIVERSITY
 Department/SubDepartment * (FISC) OPS FMO - ACCOUNTING OPERATIONS
 Department Reference Number

Account Attribute (S) STATE
 Account TRAVEL
 Account () FMO - ACCOUNTING OPERATIONS

Notes (S) STATE

Cancel Save

- The department reference number field may be used to help your department track the report through other systems or processes that might be unique to your department. Check with your department's business staff regarding the use of this field. The notes field may be used to add any additional information you feel needs to

be communicated on the request.

Edit Request Header
Request ID: X3FK

TEST	05/25/2022	05/28/2022
Travel Classification * Employee-In State	Traveler Type * Staff	Student Travel Activity Type None Selected
Contracts/Grants * No	Trip Purpose & Benefit * I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with	GSA Meal Rate
Non-Employee/Student Traveler (Last Name, First Name)	Foreign Country 1 Search by Text	Foreign Country 2 Search by Text
Foreign Country 3 Search by Text	Foreign Country 4 Search by Text	System * TRAVEL
System Member * (02) TEXAS A&M UNIVERSITY	Department/SubDepartment * (FISC OPS) FMO - ACCOUNTING OPERATIONS	Account (120052 00000) FMO - ACCOUNTING OPERATIONS
Account Attribute (S) STATE	Department Reference Number	
Notes		

Cancel Save

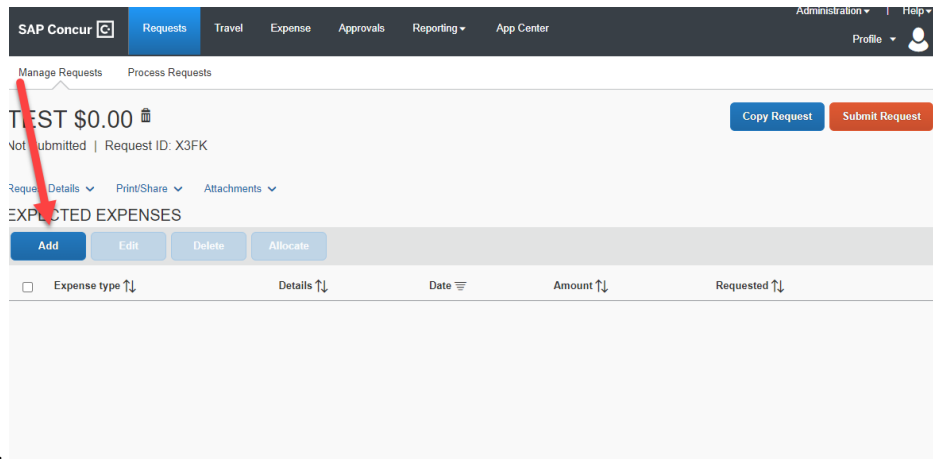
14. Once the required fields on the request header have been populated, click save. At this point you have the option to submit the report into routing for approval.

Edit Request Header
Request ID: X3FK

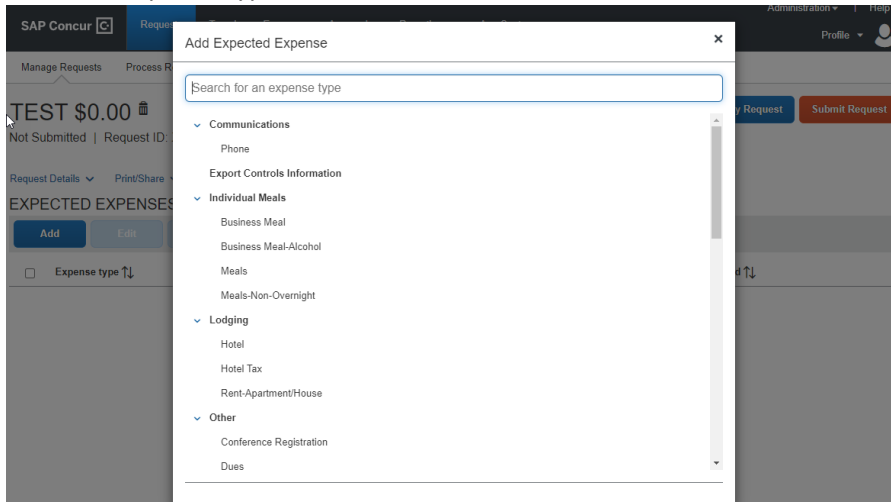
TEST	05/25/2022	05/28/2022
Travel Classification * Employee-In State	Traveler Type * Staff	Student Travel Activity Type None Selected
Contracts/Grants * No	Trip Purpose & Benefit * I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with	GSA Meal Rate
Non-Employee/Student Traveler (Last Name, First Name)	Foreign Country 1 Search by Text	Foreign Country 2 Search by Text
Foreign Country 3 Search by Text	Foreign Country 4 Search by Text	System * TRAVEL
System Member * (02) TEXAS A&M UNIVERSITY	Department/SubDepartment * (FISC OPS) FMO - ACCOUNTING OPERATIONS	Account (120052 00000) FMO - ACCOUNTING OPERATIONS
Account Attribute (S) STATE	Department Reference Number	
Notes		

Cancel Save

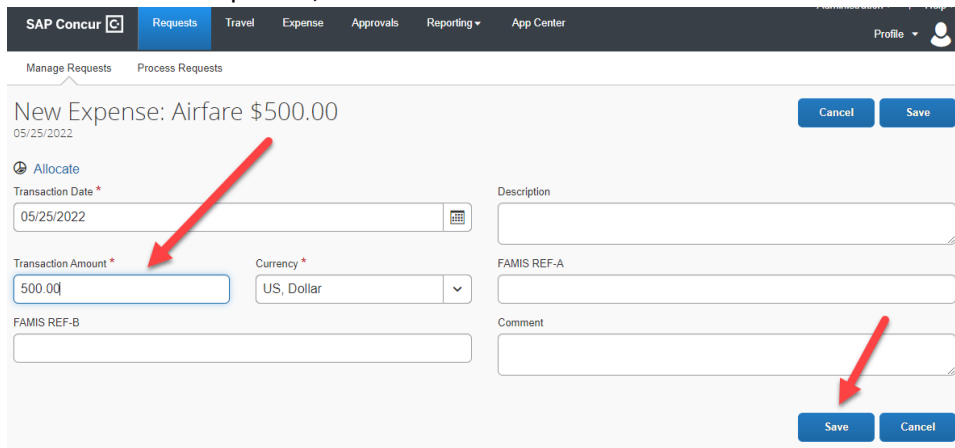
15. You may also add estimated expenses and additional routing steps. After you save the request header, the next tab you can opt to complete is the expense tab. This tab can be used to enter estimated expenses for you trip.



Select an expense type.



- Enter the estimated amount of the expense. Click save. If an account number is entered on the request header and an amount is estimated for the expenses, then the funds will be encumbered in FAMIS once the request



completes routing.

- If an estimated expense is entered in error, you can select the expense entry and then click delete. Click yes to confirm. If you need to split the encumbrance between multiple accounts, please view the demonstration on

how to allocate expenses.

The screenshot shows the SAP Concur 'Requests' page for a request titled 'TEST \$500.00'. The 'EXPECTED EXPENSES' section contains a table with one row: 'Airfare' for \$500.00 on 05/25/2022. A red arrow points to the 'Allocate' button in the toolbar above the table.

Expense type	Date	Amount	Requested
Airfare	05/25/2022	\$500.00	\$500.00

18. If you have any attachments to include, you may do so at any time after the request header has been saved. To include an attachment, click the attachments button. Select attach documents.

The screenshot shows the same SAP Concur interface as above, but with a red box highlighting the 'Attach Documents' button in the 'EXPECTED EXPENSES' toolbar.

19. Click on the Upload and Attach box, locate the file you wish to attach. Select the file, click open

The screenshot shows a Windows File Explorer window open to the 'attachments' folder. The file 'sonya approved travel request' is selected. A red arrow points to the 'Open' button at the bottom of the window. In the background, the SAP Concur interface is visible with a red box around the 'Upload and Attach' button.

20. To view the attachment, click the attachments button. Then click view documents

The screenshot shows the SAP Concur interface for a request titled "TEST \$500.00". The status is "Not Submitted" and the Request ID is "X3FK". The "Attachments" dropdown menu is open, showing options: "View Documents", "Attach Documents", and "Delete Documents". A red arrow points to the "View Documents" option. Below the menu, there is a table of expected expenses:

Expense type	Details	Date	Amount	Requested
Airfare		05/25/2022	\$500.00	\$500.00
				\$500.00

21. . If you wish to print your request, you have the option to do so. Select the print/ Share button. Select travel request report or travel request allocation report

The screenshot shows the SAP Concur interface for a request titled "TEST \$500.00". The status is "Not Submitted" and the Request ID is "X3FK". The "Print/Share" dropdown menu is open, showing options: "Travel Request Report" and "Travel Request Allocation Report". A red box highlights these two options. Below the menu, there is a table of expected expenses:

Expense type	Details	Date	Amount	Requested
Airfare		05/25/2022	\$500.00	\$500.00
				\$500.00

22. After all information has been entered and reviewed click submit request. Review the FAMIS Request Submit confirmation statement, once you have read the statement click accept and submit or cancel.

The screenshot shows a "FAMIS Request Submit Confirmation" dialog box overlaid on the SAP Concur interface. The dialog contains the following text:

By submitting this request, I acknowledge the purpose of this travel is for university business and is explained in further detail in purpose and benefits. If foreign, I further acknowledge and understand the conditions and potential risks associated with foreign travel and have been briefed on the current Travel Warning (if applicable) posted by the U.S. Department of State at http://travel.state.gov/travel/cis_pa_tw/tw_1764.html

In addition, I have updated my profile's contact information, emergency contact information, international travel information, and indicated all countries entering.

At the bottom of the dialog, there are two buttons: "Cancel" and "Accept & Continue". A red arrow points to the "Accept & Continue" button.