

Create a Request for Domestic Travel

- 1.) To create a new request, begin on the Concur home page. Next, hover your cursor over the tile labeled “new.”
 - a. Select start a request.

The screenshot displays the SAP Concur home page for The Texas A&M University System. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. A dashboard section shows various metrics: '00 Required Approvals', '02 Authorization Requests', '03 Available Expenses', '10 Open Reports', and '00 Cash Advances'. A 'new' button is highlighted, and a dropdown menu is open, listing options: 'Start a Request', 'Start a Report', 'New Cash Advance', 'Enter New Reservation', and 'Upload Receipts'. The 'Start a Request' option is selected. Below the dashboard, there are sections for 'TRIP SEARCH', 'COMPANY NOT', 'MY TASKS', and 'MY TRIPS (1)'. The 'MY TASKS' section shows '00 Required Approvals', '03 Available Expenses', and '10 Open Reports'.

- 2.) This will create a blank request header. All required fields will be marked with a red asterisk and must be populated before you can continue with request creation.

Create New Request ✕

Trip Name/Destination * * Required field

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? ? 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 * Search by Code

System * TRAVEL

Account

Account Attribute

Department Reference Number

Notes

Cancel Create Request

- 3.) 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 * * Required field

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? ? 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 * Search by Code

System * TRAVEL

Account

Account Attribute

Department Reference Number

Notes

Cancel Create Request

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

Create New Request

This screenshot shows the 'Create New Request' form. The 'Trip Start Date' and 'Trip End Date' fields are highlighted with red arrows. The form includes various dropdown menus and text input fields for trip details, traveler information, and departmental data.

| | | |
|---|-----------------------------|------------------------------|
| Trip Name/Destination * | Trip Start Date * | Trip End Date * |
| | MM/DD/YYYY | MM/DD/YYYY |
| Travel Classification * | Traveler Type * | Student Travel Activity Type |
| None Selected | None Selected | None Selected |
| Contracts/Grants * | Trip Purpose & Benefit * | GSA Meal Rate |
| No | | |
| Non-Employee/Student Traveler (Last Name, First Name) | Foreign Country 1 | Foreign Country 2 |
| | Search by Text | Search by Text |
| Foreign Country 3 | Foreign Country 4 | System * |
| Search by Text | Search by Text | TRAVEL |
| System Member * | Department/SubDepartment * | Account |
| (02) TEXAS A&M UNIVERSITY | Search by Code | |
| Account Attribute | Department Reference Number | |
| | | |

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

This screenshot shows the 'Create New Request' form with the 'Travel Classification' and 'Traveler Type' dropdown menus open. Red arrows point to these menus. The 'Travel Classification' dropdown shows options: None Selected, Board of Regents, Employee Foreign, Employee In State, and Employee Out of State. The 'Traveler Type' dropdown shows: None Selected.

| | | |
|---------------------------|-----------------------------|------------------------------|
| Trip Name/Destination * | Trip Start Date * | Trip End Date * |
| TEST | 05/25/2022 | 05/28/2022 |
| Travel Classification * | Traveler Type * | Student Travel Activity Type |
| Employee-In State | None Selected | None Selected |
| None Selected | Trip Purpose & Benefit * | GSA Meal Rate |
| Board of Regents | | |
| Employee Foreign | Foreign Country 1 | Foreign Country 2 |
| Employee In State | Search by Text | Search by Text |
| Employee Out of State | Foreign Country 4 | System * |
| | Search by Text | TRAVEL |
| Foreign Country 3 | Department/SubDepartment * | Account |
| Search by Text | Search by Code | |
| System Member * | Department Reference Number | |
| (02) TEXAS A&M UNIVERSITY | | |
| Account Attribute | | |
| | | |

6.) 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? No

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

7.) Next enter the purpose and benefit of the trip. This should contain a detailed description of why the trip will occur such as a short 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 characters.

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? No

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

- 8.) 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

Required field

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?

No

None Selected

No

Yes

TRAVEL

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

Foreign Country 1 Search by Text

Foreign Country 3 Search by Text

Foreign Country 4 Search by Text

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. For domestic travel you may omit the field labeled Foreign Risk and Foreign Country.

Edit Request Header

Request ID: X3FK

Required field

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? 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 * TRAVEL

System Member * (02) TEXAS A&M UNIVERSITY

Department/SubDepartment *

Account

Account Attribute

Department Reference Number

Notes

Cancel Save

- 10.) 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 |
| 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 | Account |
| Account Attribute (S) STATE | Department (FISC) FINANCIAL MANAGEMENT OPERATIONS (FISC CLEAR) FMO - CLEARING ACCOUNT (FISC EPAY) FINANCIAL MANAGEMENT OPERATIONS - EPAY (FISC FMO) FINANCIAL MANAGEMENT OPERATIONS (FISC OPS) FMO - ACCOUNTING OPERATIONS (FISC UTIL) FINANCIAL MANAGEMENT OPS - UTILITIES | |
| Notes (S) STATE | Department Reference Number | |

Cancel Save

11.)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 |
| 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 () FMO - ACCOUNTING OPERATIONS |
| Account Attribute (S) STATE | Department Reference Number | |
| Notes (S) STATE | | |

Cancel Save

12.)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.

The screenshot shows the 'Edit Request Header' form for Request ID X3FK. The form is populated with the following information:

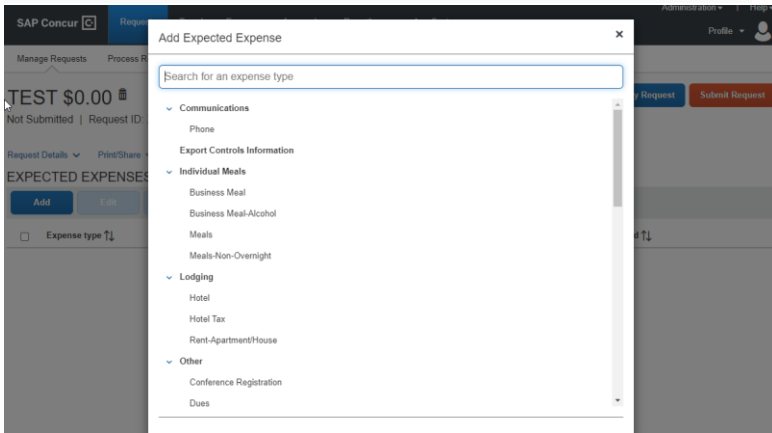
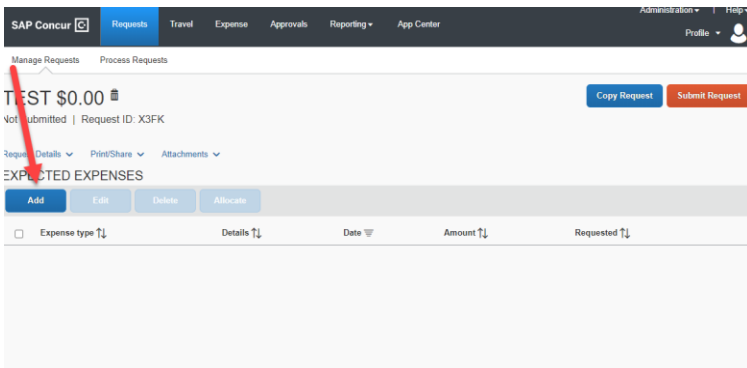
- Request ID: X3FK
- TEST
- 05/25/2022
- 05/28/2022
- Travel Classification: Employee-In State
- Traveler Type: Staff
- Student Travel Activity Type: None Selected
- Contracts/Grants: No
- Trip Purpose & Benefit: I am attending the Concur Conference where I will learn about new innovation for travel and best practices. I will also be networking with
- GSA Meal Rate: [Empty]
- Personal Travel Included?: No
- 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: [Empty]
- Notes: [Empty text area]

Red arrows point to the 'Notes' field and the 'Department Reference Number' field.

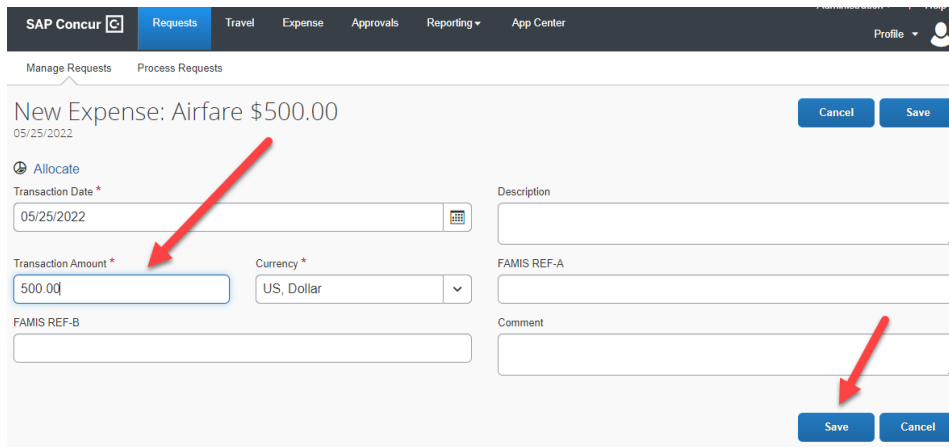
13.) Once the required fields on the request header have been populated, click save. At this point you have the option to submit the report into routing for approval.

This screenshot is identical to the one above, showing the 'Edit Request Header' form with all fields populated. A red arrow points to the 'Save' button at the bottom right of the form.

14.) 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 your trip. Select an expense type.




15.) 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.



16.) 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.

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Profile

Manage Requests | Process Requests

TEST \$500.00 

Not Submitted | Request ID: X3FK

Request Details | Print/Share | Attachments

EXPECTED EXPENSES


Add Edit Delete Allocate

| <input checked="" type="checkbox"/> | Expense type ↑↓ | Details ↑↓ | Date | Amount ↑↓ | Requested ↑↓ |
|-------------------------------------|-----------------|------------|------------|-----------|-----------------|
| <input checked="" type="checkbox"/> | Airfare | | 05/25/2022 | \$500.00 | \$500.00 |
| | | | | | \$500.00 |

17.) 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.

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Profile

Manage Requests | Process Requests

TEST \$500.00 

Not Submitted | Request ID: X3FK

Request Details | Print/Share | Attachments

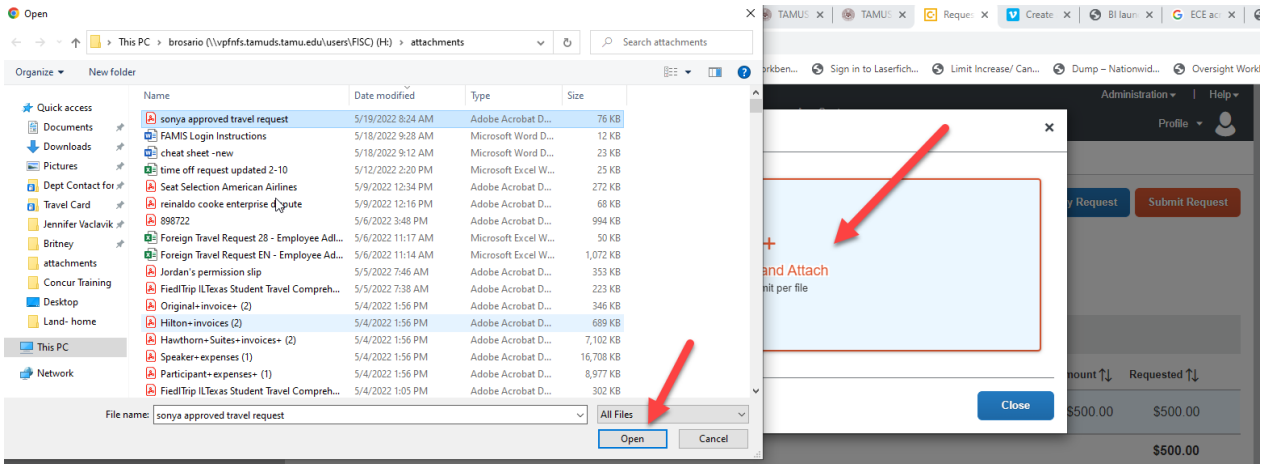
EXPECTED EXPENSES

Add Edit Delete Allocate

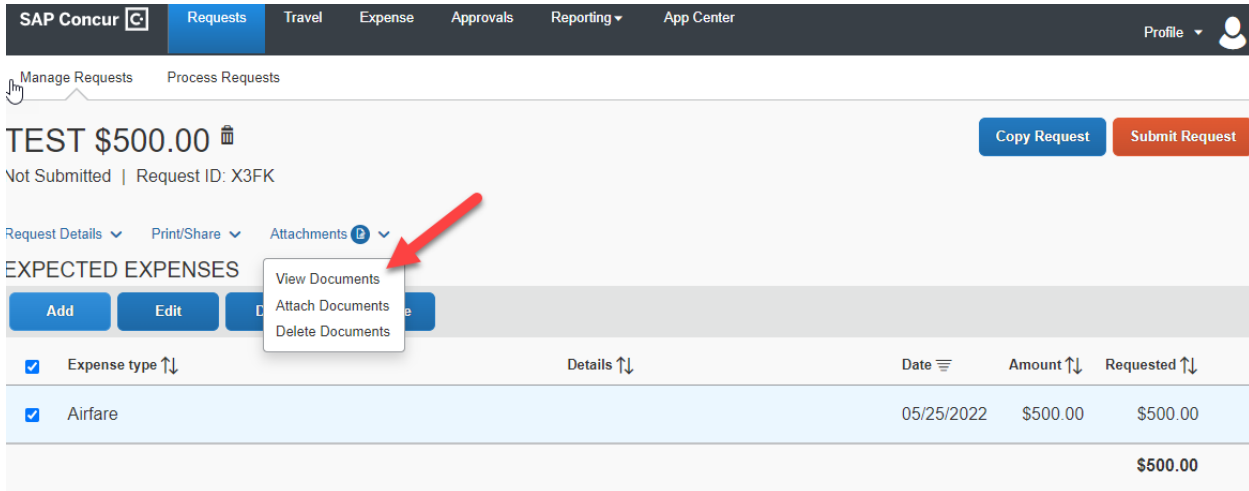
Attach Documents

| <input checked="" type="checkbox"/> | Expense type ↑↓ | Details ↑↓ | Date | Amount ↑↓ | Requested ↑↓ |
|-------------------------------------|-----------------|------------|------------|-----------|-----------------|
| <input checked="" type="checkbox"/> | Airfare | | 05/25/2022 | \$500.00 | \$500.00 |
| | | | | | \$500.00 |

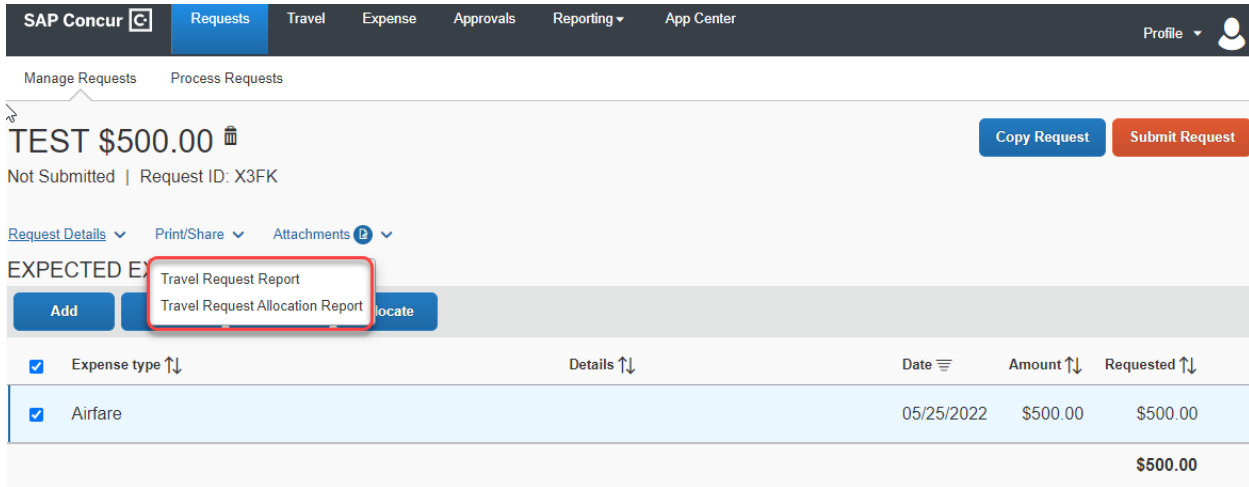
18.) Click on the Upload and Attach box, locate the file you wish to attach. Select the file, click open



19.) To view the attachment, click the attachments button. Then click view documents.



20.) 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.



21.) 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.

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Requests | Process Requests

TEST \$525.00

Not Submitted | Request ID: X3FK

[Copy Request](#) [Submit Request](#)

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

| <input type="checkbox"/> | Expense type | Details | Date | Amount | Requested |
|--------------------------|--------------|---------|------------|----------|-----------------|
| <input type="checkbox"/> | Airfare | | 05/25/2022 | \$500.00 | \$500.00 |
| <input type="checkbox"/> | Meals | | 05/25/2022 | \$25.00 | \$25.00 |
| | | | | | \$525.00 |

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

TEST \$500.00

Not Submitted | Request ID: X3FK

FAMIS Request Submit Confirmation

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.

[Cancel](#) [Accept & Continue](#)

| <input checked="" type="checkbox"/> | Expense type | Details | Date | Amount | Requested |
|-------------------------------------|--------------|---------|------------|----------|-----------------|
| <input checked="" type="checkbox"/> | Airfare | | 05/25/2022 | \$500.00 | \$500.00 |
| | | | | | \$500.00 |