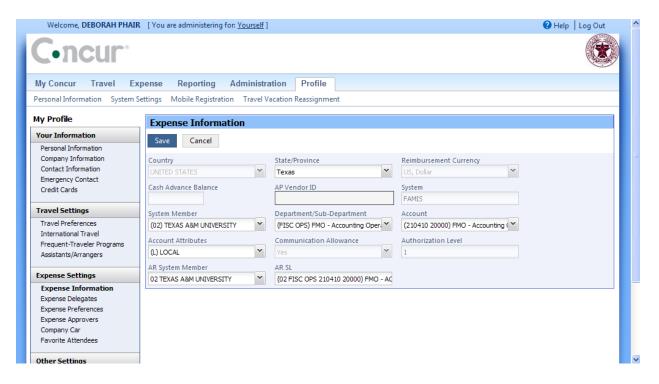# Preparing Your Travelers

1. Name in Traveler's profile – will need to confirm that it is identical to those on the photo identification that they will be presenting at the airport. If not identical, they can change. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket. Tickets will be issued based on the name in the traveler's profile.
2. Confirm Company Information is correct. Manager field is not used. Any changes needed, email changes to kpayne@ag.tamu.edu.
3. Work Address – Company Name will always be Texas A&M University System because that is how we are set up with Concur. The rest of these fields are optional.
4. Home Address – optional
5. Contact Information has three required fields: Work Phone #, Home Phone # and Email Address
6. Emergency Contact needs to be populated. This is what will be used if there is an emergency while you are in travel status.
7. Travel Preferences – optional. If they have frequent traveler program memberships, they will need to enter those membership #'s.
8. TSA Secure Flight – gender and date of birth are required.
9. International Travel – if applicable, will need to enter passport #, passport date issued, passport expiration and passport place issued.
10. Assistants and Travel Arrangers – know which employee they will delegate this to. It is a drop down list that includes all employees of the participating system members.
11. Credit Cards – will need to know the credit card numbers, billing address and expiration date of any that they will use to pay for travel booked in Concur.

12. Expense Report Delegates – they will assign these delegates under their Expense Settings tab.

13. Expense Information – this is where you want to tell your travelers what to enter in the System Member, Department/Sub-Department, Account, Account Attributes, AR System Member and AR SL. If populated here, they will then default on the Expense and AR headers.

14. Under Other Settings – you will want to make sure they activate their E-Receipt Activation, Download TripIt App and connect your account under Connected Apps and Download Concur App and register your mobile phone.

15. Make sure your travelers know if their accounts belong to one of the participating system members. Participating members are: Texas A&M University, Texas A&M University System, Texas A&M University-Galveston, AgriLife Research, AgriLife Extension, Texas Veterinary Medical Diagnostic Laboratory, Prairie View A&M University, Tarleton State University, Texas A&M University-Corpus Christi, Texas A&M

University – Kingsville, Texas A&M University – Commerce, and Texas A&M University – Texarkana. If they have an OSRS account that belongs to one of these member's books, then those will be processed through Concur. If they travel on A&M Foundation accounts, the A&M Foundation has said they will transfer their money to the TAMU account prior to the payment, so that these can be processed in Concur. This must be requested in advance.

16. Besides the information that we have on the eTravel web page at https://www.tamus.edu/offices/travel/, we have now have a Training Portal that includes additional demos and guides. The Training Portal is now available at http://www.concurtraining.com/customers/tamu/index.htm

17. We also have set up some Concur-Help Desk sessions that you can sign up for at https://vpfnweb3.tamu.edu/twa/do/login. These are user defined help sessions for faculty and staff to bring their question, problems and work for hands on assistance. Additional sessions and trainings will set up as we determine what is needed.