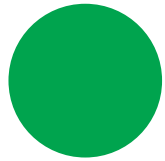




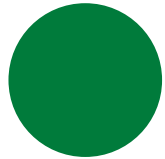
Faculty Guidelines  
RCoB Travel Procedures

# Remember



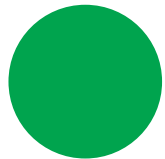
## Coupa Pre-Approval Required

All travel requests must be approved in Coupa before travel arrangements are made. An email from a Director, Chair, or Staff member does not mean your travel is approved!



## Coupa Is An Estimate

What you enter on the dynamic form is what staff will use to complete your request in Coupa so please be as accurate as possible – however, Coupa is a pre-approval tool with *estimated* expenses, so there is no need to submit additional requests if airline ticket prices change, etc.



## Plan Ahead

Please allow a minimum of 3 weeks before anticipated dates of travel for Coupa processing.

# Before Travel

1. You, as the traveler, enter information into the [Travel Authorization Request Form](#).

*Please choose your department coordinator as your Travel Assistant.*

2. The department coordinator enters the request into Coupa.

3. You will be notified via email that your request is pending review and submission.

**4. You must submit the request**

5. Supervisor/Account Holder approves the request and you will be *notified via email*.

6. You will book your flight, hotel, and register for conference, etc.

# Upon Returning

1. You will return with receipts. (All receipts must have the amount, payment method, and date)
2. You will submit receipts to appropriate Admin Coordinator.
3. The Admin Coordinator enters the expense report in Coupa.
4. You will be notified via email that your expense report is pending review and submission.

**5. You must submit the report**

6. Supervisor/Account Holder approve expenses.
7. Coupa notices are sent at each stage and reimbursement is issued.

\*All expenses should be submitted within 30 days. If an OOP expense reaches 60 days for any reason, then it becomes taxable\*

# Mileage Reimbursement Only - No Request Needed

- You will email appropriate Admin Coordinator upon return with reason for travel and the date or dates of travel.
  - Per Dean Wiley's direction on mileage reimbursements:  
Calculate mileage from the faculty's residence to destination  
- or -  
Calculate mileage from BLB to destination  
**RCoB will pay the lower of the two**
- Those who reside in Collin County and travel to the Frisco Campus for business will not be reimbursed for travel.
- You must submit any toll receipts and conference agendas to the Admin Coordinator

# Remember

- **Coupa Pre-Approval Required**  
All travel requests must be approved in Coupa **before** travel arrangements are made. An email from a Director, Chair, or Staff member does not mean your travel is approved!
- **Coupa Is An Estimate**  
What you enter on the dynamic form is what staff will use to complete your request in Coupa so please be as accurate as possible - however, Coupa is a pre-approval tool with estimated expenses, so there is no need to submit additional requests if airline ticket prices change, etc. **Please be sure to include estimated taxes!**
- **Plan Ahead**  
Please allow a minimum of 3 weeks before anticipated dates of travel for Coupa processing.
- **Texas Hotel-State Taxes**  
For lodging in Texas, Texas State Occupancy Tax shall not be assessed for any travel within the state of Texas. Travelers shall present the completed tax exemption form to the hotel front desk at the time of check-in. <https://www.untsystem.edu/forms-library/documents/form-hotel-occupancy-tax-form.pdf> Although the hotels are not required to accept the exemption form, employees must present the form at check-in.  
  
Note: If the commercial lodging establishment denies the exemption, the employee must state that fact when claiming the expense.
- **International Travel**  
International travelers are required to register their travel four weeks in advance with Risk Management. Please visit: <https://emergency.unt.edu/international-travel-registration-revised> for more information.

1

Login to Next Gen Web Solutions

**Username**

**Password**

Don't Remember Login

3

Instructions

Form Participants

Administrative Coordinator

Please select

**Please select**

- Accounting: Andrews, Becky
- FIREL: Nichols, Kathy
- ITDS: Romero, Isaac
- Logistics: Garcia, Ruben
- Management: McAdams, Megan
- Marketing: Geisler, Sarah
- Dean's Office: Wallace, Salina
- Undergraduate Advising: Barthold, Lori
- Graduate Programs: Crispin, Ashley
- Logistics Center: Peavy, Chris
- Center for Energy Accounting and Sustainability: DeLay, Judy

2

Welcome to Dynamic Forms

Let's get started, Diana.

The RCOB Travel Approval Request form needs to be completed.

You can check back here anytime to view your Pending / Draft Forms and review your completed Forms History.

Thank you for using Dynamic Forms!

# Traveler Information

First and Last Name	* Diana Bergeman	Faculty/Staff EMPL ID	* 12345678	Department:	Marketing
Designation:	* Staff	Email Address:	* diana.bergeman@unt.edu	Phone Number:	* 3141
Departure Date	* 08/10/2023	Return Date	* 08/15/2023		
Type of Travel:	* Out of State	Does Your Trip Include Personal Travel?	Yes	Personal Travel Dates	08/10-08/12/2023
Destination (City, State, Country)	* Chicago				
Purpose for Travel	* Conference	Explanation:	* I'm attending the 2023 NAME OF CONFERENCE to REASON (present my research, serve on a panel, as a conference attendee, etc). The conference is on 08/13-08/15		
Are you using a sponsored grant to fund any portion of this travel?	* Yes	Please enter the Grant project number(s):	GX00000		



## Double Check Your Information

Please pay special attention to the travel dates – you will use the actual dates of travel, not the ‘event’ dates.



## More is MORE

The more information you provide in the explanation field, the better.

# Travel Details

Flight Arrangements:

Lodging:

Rental Car:

Mileage Estimate:

Mileage rates can be found [here](#).

Ground Transportation:

Parking:

Registration Fees:

Membership Fee:

Other Expenses:

I will claim meal Per Diem

Other Info/

Funding Specifics:

Total Approx. Travel Expenses  
Before Per Diem:

I am requesting a cash advance:

<https://finance.untsystem.edu/travel/cash-advance-setup-concur.php>

I understand that I may have been awarded an allotted amount of funding for travel and will only be reimbursed up to the designated amount, regardless of the amount of my request.

Upload Agenda/Itinerary

Upload Misc

(funding approval,  
conference acceptance, etc)

Please be advised, the Admin Coordinator **CANNOT** pay for your registration fee if a user specific sign-on is required. They are not authorized to take your username and password to sign in on your behalf. You will need to pay the registration fee yourself and submit for reimbursement.

Please be advised, the Admin Coordinator **CANNOT** pay for your membership fee if a user specific sign-on is required. They are not authorized to take your username and password to sign in on your behalf. You will need to pay the registration fee yourself and submit for reimbursement.



Make sure to check the Per Diem box and be as detailed as possible



# Assigning a Delegate

# Setting up a Coupa Delegate

Delegates are individuals who are authorized to work on your behalf. They may submit requests and reports, and some delegates may even approve on your behalf.

To add a delegate to submit a request or report, follow these steps:

1. Click on your user icon in the upper right corner
2. Go to settings
3. Click on delegates
4. Under **Delegate Expense Creation** sections, enter the name of your chosen delegate. Do not use “delegates” section because it will give delegate approval authority to your reports.
5. Select the correct individual from the list that populates
6. Click Save Delegates

# Settings



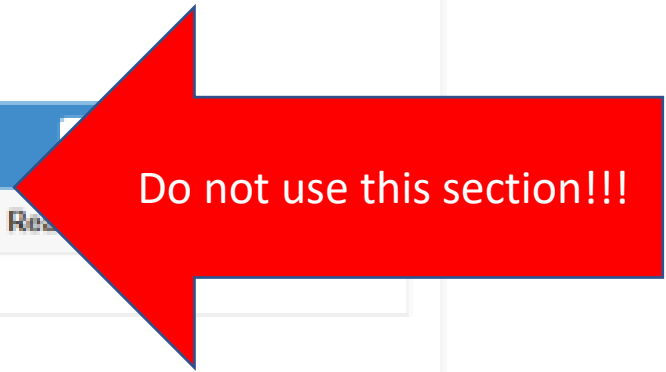
General **Delegates** Billing Accounts Reports Notifications

## Delegates

- Turn off my own notifications during delegation period.
- Notify me whenever a delegate approves something for me.

Create

Delegate	Approval Delegate	Receiving Delegate	Start Date	End Date	Re...
No rows.					

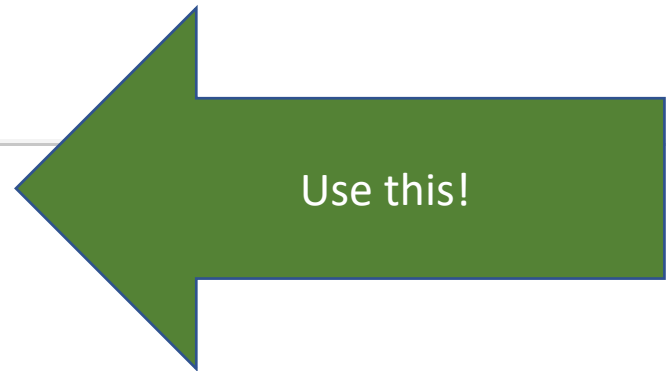


Per page 15 | 45 | 90

### Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Select



# Setting up a Deem Delegate

(only at request of department admin)


A delegate in Deem is an individual that may book travel arrangements on your behalf, including airfare, lodging, and car rentals.

To set up a delegate to book travel, follow these steps:

1. Login to Deem using your SSO credentials
2. Click the user icon in the upper right
3. Click Profile
4. Scroll down to the Organization section and click Delegate
5. To add a delegate for yourself, click Add Delegate, enter the user's name or email address, and select from the drop-down list

## Delegate

---

 **You don't have any accounts to book for**

Manage who you can book for.

[+ Add Accounts](#)

---

 **No one can book for you**

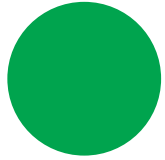
Manage who can book for you.

[+ Add Delegate](#)

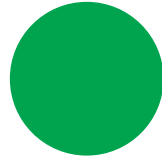
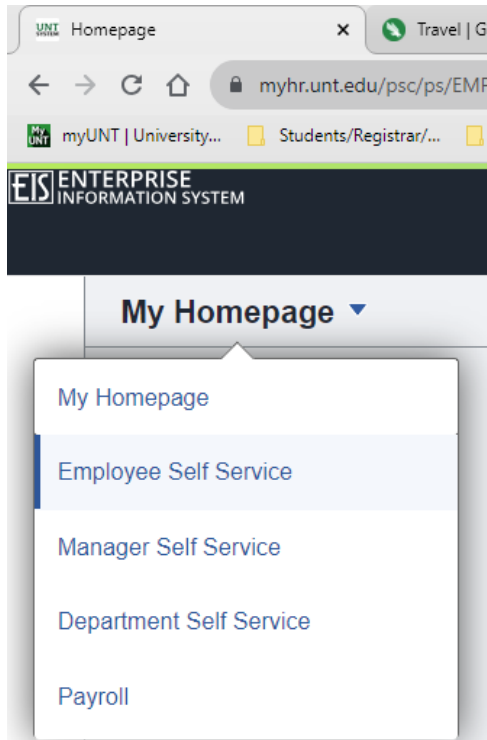


# Submitting a Request or Expense

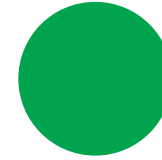
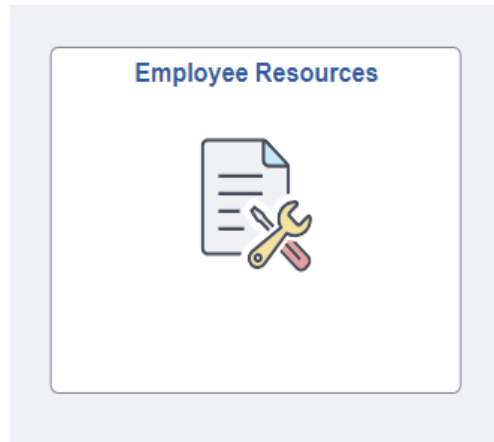
# Submitting your expense report for reimbursement



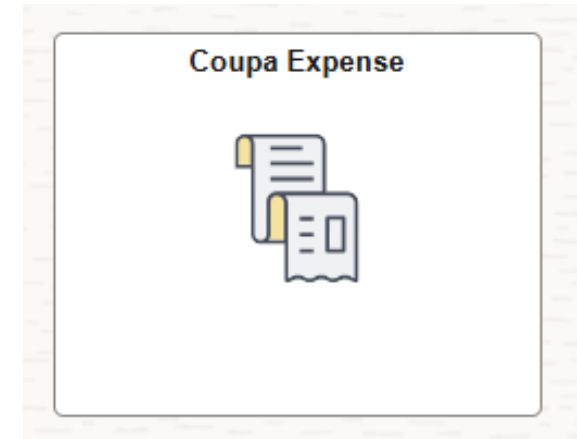
**Log in to my.untssystem.edu and use the drop down to get to Employee Self Service**






**Click on the Employee Resources tile**




**Click on the Coupa Tile**



# Good afternoon!


Forms  Content Group  All 

 What do you need? Start your search here

## My Work


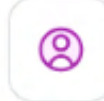


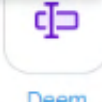
Recent Activity Approvals To Do [View All](#)

All **1** Expense **1**

Example  
49.14 USD • Jillian Parsons 17 Oct Working 10/17 

View

## Shortcuts

-  My Expenses
-  Domestic Travel Request
-  International/Puerto Rico Travel Request
-  Card Action Request
-  Deem

On the homepage, click the three dots and select “View”. If it does not appear, make sure to click “Recent Activity”.



### Expense Lines

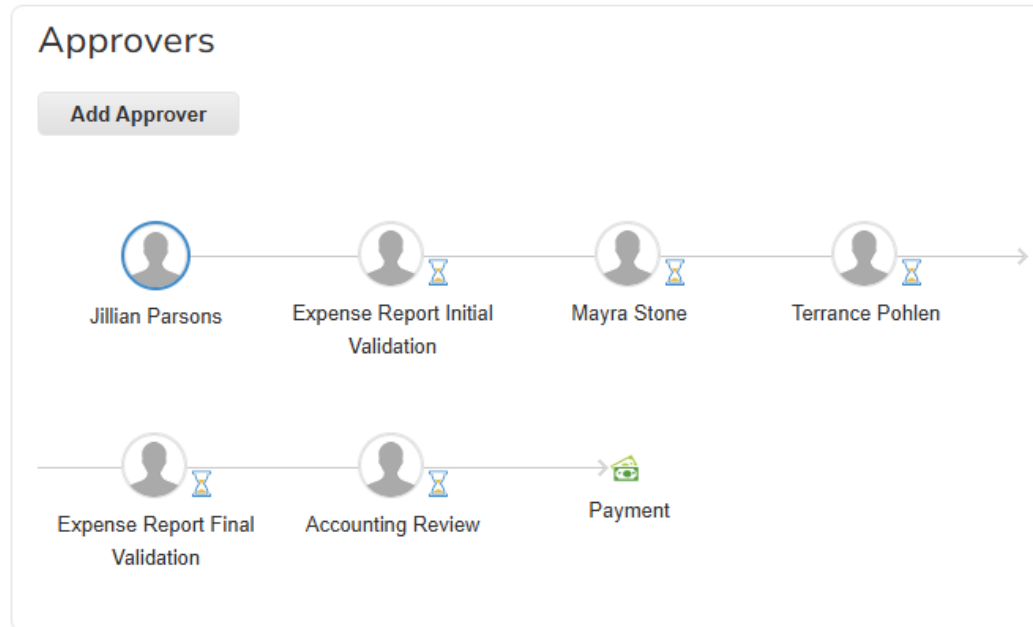
Sort by Expense Date

MM/dd/yy	Expense Category	Description	0.00 USD
10/17/25	Mileage TIS	Example	49.14 USD

[Add Expense Line](#)

Total **49.14 USD**

You will be reimbursed 49.14 USD



[Submit for Approval](#)

Review the expense, scroll down, and hit “Submit for Approval”.



# Booking Your Flight In Coupa

Good afternoon!

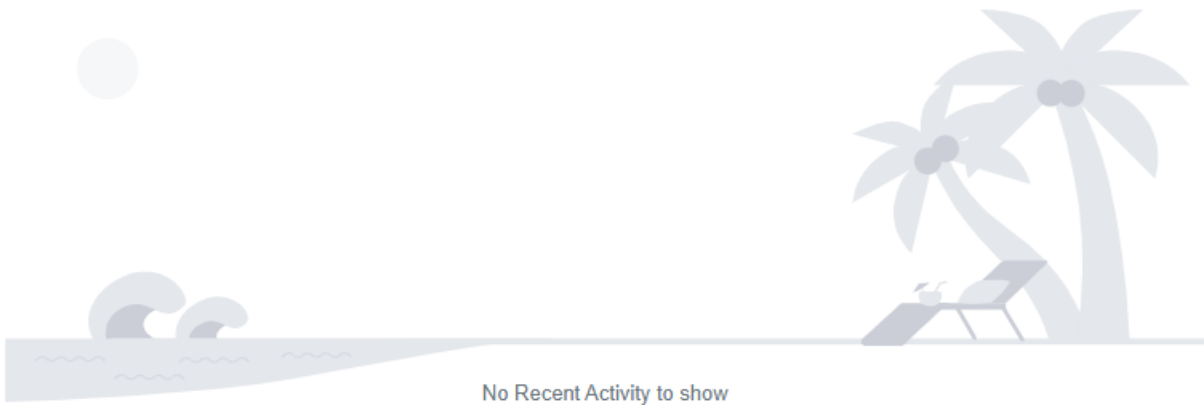
Forms Content Group All

What do you need? Start your search here

My Work

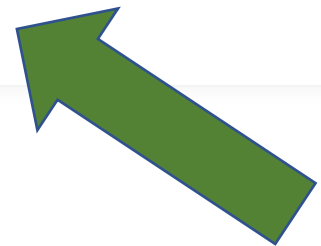
Recent Activity Approvals To Do

View All



Shortcuts

- My Expenses
- Domestic Travel Request
- International/Puerto Rico Travel Request
- Card Action Request
- Deem



Go to the home page and click "Deem".



**Activate your account** 1 of 4

**Personal Information**

First Name  
Jillian

Middle Name

Last Name  
Parsons

Suffix ▼

Username  
jillian.parsons@unt.edu

Date of Birth

Time Zone ▼

Gender ▼

[Why do we need this info?](#)

First time logging into Deem, you will have to create an account.

## Activate your account

4 of 4

### Flight Preferences

Home Airport  
DFW



Meal Preferences



### Seat Preference

Window

Aisle

### Air Special Requests (Up to 3)

- Deaf/Hard of Hearing
- Visually impaired traveler
- Wheelchair - can ascend and descend stairs
- Wheelchair - cannot ascend or descend stairs
- Wheelchair - manual
- Wheelchair - must be carried

### Hotel Preferences

### Hotel Special Requests (Up to 3)

- Away from elevator
- Away from ice machine
- Disabled accessible
- Extra Pillows
- Extra Towels
- Higher floor room
- Non-smoking bed linen

### Car Rental Preferences

Default Car Type



### Car Special Requests (Up to 3)

- Automatic door locks
- Child Seat/Infant
- Child Seat/Toddler
- Cruise Control
- Flat folding 3rd seat
- Hand controls-left
- Hand controls-right
- Hatchback
- Luggage Rack
- Mobile Phone
- Navigational system
- No smoking car
- Satellite radio
- Ski Rack Only
- Smoking car
- Snow Chains

I acknowledge that I have read and agree to the [Privacy Policy](#)



Fill out information and preferences.

  
Flights

  
Hotels

  
Car Rentals

Round Trip One Way Multi City

Coach ▾

From  
DFW



To  
LAX

Depart on  
Oct 23

Leaving  
Any Time

Return on  
Nov 20

Leaving  
Any Time








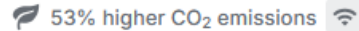



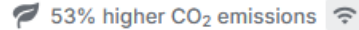


### Welcome to Deem, Managed by CI Azumano Travel

Contact Information for CI Azumano Travel:  
To reach a travel counselor: 800-777-5149...

[Show more](#)

Using the search bar, enter the destination and dates and click the magnifying glass.


## Departing Flights


 DFW <b>6:00 am</b> ————— <b>7:14 am</b> LAX 3h 14m • Nonstop <a href="#">Details</a> 	<b>Main Cabin</b> <b>\$673</b> Round trip 	<b>Main Cabin Flexible</b> <b>\$793</b> Round trip 
 DFW <b>7:10 am</b> ————— <b>8:34 am</b> LAX 3h 24m • Nonstop <a href="#">Details</a> 	<b>Main Cabin</b> <b>\$673</b> Round trip 	<b>Main Cabin Flexible</b> <b>\$793</b> Round trip 
 DFW <b>8:15 am</b> ————— <b>9:32 am</b> LAX 3h 17m • Nonstop <a href="#">Details</a> 	<b>Main Cabin</b> <b>\$673</b> Round trip 	<b>Main Cabin Flexible</b> <b>\$793</b> Round trip 

Select the departing and returning flight.

## Review your trip


 Add Flights

 Add Hotel

 Add Car Rental

### ATTENTION:

NOTE: If you are going to hold this trip, trips can only be held until 11:59pm Eastern. Please purchase or cancel your trip by this time.

 THU, OCT 23

\$707


### DFW → LAX

[View Details](#) >

6:00 Am — 7:14 Am • American Airlines 1639  
Coach • Nonstop • Non-Refundable

[Select Seats](#) [Change Flights](#)



 THU, NOV 20


### LAX → DFW

[View Details](#) >

12:59 Am — 5:54 Am • American Airlines 2245  
Coach • Nonstop • Non-Refundable


[Select Seats](#) [Change Flights](#)



EcoCheck 


**650.36 Kg CO<sub>2</sub>**

[Carbon footprint of your trip](#) >




### Trip to Los Angeles, CA


Thu, Oct 23 - Thu, Nov 20, 2025

Traveler  
**Jillian Parsons** 

**PAYABLE NOW**

Flights \$706.56

 [Rules and Restrictions](#) >

Est. Total  **\$706.56**

[Checkout](#)

[Hold Trip](#)

Once both have been selected, click “Checkout”.

**Traveler Information** Change

**Additional Information**

Some additional information is required in order to book your trip


**Additional Information**

Travel Request ID

Travel Request ID

**Continue**

**Payment Information**



[Home](#) **Travel & Expenses**

Expenses Reporting ▾

## Expenses

**Preapprovals** [Create](#)

Draft 1 ▾

Expense Preapproval #11227

**Reports** [Create](#)

No reports in progress

Continue through Checkout pages. The Travel Request ID is the preapproval number in Coupa. This can be found in Coupa on the Travel page under preapprovals.

## Traveler Information

## Additional Information

## Payment Information

### FLIGHT

DFW ⇄ LAX • Coach  
Mon, Nov 24, 9:20 pm

Taxes and Fees

### Due today



UNTS Corporate Card

By booking, you agree to the [Booking Conditions](#), [Terms](#)

Total Estimated Cost

**\$402.97 USD**

For the payment card, “University Ghost Card” should auto populate in the payment information. If it doesn’t contact Travel and your coordinator.