

Concur: Purdue Travel Program Tips

General Help Resource for Travel – Concur: www.purdue.edu/business/travel/

- FAQ's by category can be found on the grey ribbon near the top.
- Additional information can be found in Travel A-Z index:
www.purdue.edu/business/travel/Quick Links/index.html
- Training resources are also on the grey ribbon, which opens to several QRC's and helpful links.

TRIP REQUEST APPROVAL/BOOKING (to be completed prior to trip):

PERSONAL TIME: If personal time (days not business related, extending length of trip by more than 3 days) is included, or traveler opted to drive vs. fly, attach appropriate Cost Comparison documentation. *See Travel guidelines for directions on conducting a Cost Comparison.*

Trip Request for ALL Travel: Travel requests are required for all business travel, except when covered by blanket travel. This documents that you are away from campus for business travel and assists should an emergency occur while you are on your business travel.

Vehicle Use: Students using a personal vehicle or rental vehicle must complete Form RM01 **prior** to the trip. Submit completed form to costravel@purdue.edu for processing and approval/denial. Allow appropriate time for processing, typically 5-7 business days.

Travel Greater than 22 days: If travel is greater than 22 business days a Change of Duty Electronic Form within Success Factors.

International Flights: When traveling international and using government funded grants, US Flag Carrier Airlines are a requirement. You can locate detailed information in the Travel A-Z index under U.S. Flag Carriers.

Airfare/Hotel Packages: When booking hotel and airfare as a package outside of Concur (**Expedia, Travelocity, etc.**), request an itemized bill showing amount of airfare, amount for hotel including room rate and tax rate for hotel stay.

Flight and Car Rental Class: Air travel and car rental must state class of service. **Standard/Coach** for airfare.

Economy/Standard/Intermediate for car rental. If a higher class was used, attach approval documentation – REQUIRED.

Request Title Format: DEPT/Traveler First Initial Last Name/Location/Event/Start Date-End Date ex.(BIO/J Smith/Chicago,IL/IAS/May13-18)

Traveler Type: ALWAYS leave traveler type as Employee (EMP)

Destination: List all destinations

Account Assignment: An account number is REQUIRED to successfully submit the request.

EXPENSE REPORT COMPLETION (to be completed as soon as possible upon completion of trip and posting of expenses):

Report Comment Section (Details – Comments):

1. State purpose of Travel and benefit to grant if applicable (i.e. XYZ Conference, Research Collaboration with Dr. X at State College).
2. State if Travel Grant or Award will supplement part of the travel, indicating amount and source. Attach copy of award letter.
3. Explain briefly if not claiming expense for the following
 - a. Transportation to/from airport, hotel and/or business (i.e. shared ride with "name" or "name" paid).
 - b. Lodging – i.e. stayed with family/friend, paid by Host, prepaid in registration cost, paid by Travel Award.
 - c. Airfare/Train/Bus – i.e. paid by Host, prepaid in registration, paid by Travel Award.
 - d. Meal Expense/per diem – i.e. not claiming, claiming reduced amount, meals included in registration

Receipts: Always attach receipts for airfare, lodging*, rental car, registration and all other expenses OVER \$75. *MUST be itemized.

Expense Entry:

1. **Hotel** – Itemize per day, with room rate and tax amount. This is required.
2. **Taxi/Subway/Shuttle/Bus/Train:** Add comment to the line item expense for purpose of expense (i.e. from airport to hotel, from hotel to Conference, from hotel to train station, etc. Each line item for these expenses requires an explanation.
3. **Meals/per diem** - Created with the itinerary in Concur. If meals are provided at event, check the appropriate meal. All food purchases on your Travel Card should be marked as personal expense.
4. **Reimbursement:** Reimbursement is via direct deposit, if regularly paid by Purdue. Purdue pays the Travel Card balance after the Expense Report is submitted and approved. If the approved Expense Report results in the Traveler owing Purdue ("the company"), the amount owed is deducted from the employee's next payroll cycle.