

Reporting your Purdue Travel in Concur Graduate and Under Graduate Students

Important Information about Traveling for Purdue:

- All travel should be reported in Concur
- Reporting consists of a travel request and an expense report
- Check with your supervisor or business office about whether or not applying for a Purdue Travel Card is appropriate
- If you use a travel card, enable E-Receipts
- Instructions (QRC's) for creating a request and a report can be found under www.purdue.edu/travel

Travel Requests:

- A travel request should be submitted in concur at least two weeks prior to the traveler's trip. This request will notify your supervisor that you will be away from the university and if traveling internationally, will allow for Risk Management to arrange for travel insurance.
- Travel Requests and Expense reports need to be named using the following naming convention:
 - Funding area abbreviation (see list below)
 - Name first initial and last name
 - Destination
 - Date of travel (either first or last day)
 - Example: [SIS-R Taylor-New Orleans-06.12.2016](#). There are 40 characters available in this field
- Any field in concur with a small red line in the front of the box must be answered. If you skip one of these fields, you will get a bright red exclamation point and will not be able to proceed.

- Graduate Students are considered EMPLOYEE's when using concur. Undergrads are considered STUDENTS.
- Your request must have an Account Assignment. If you do not know the correct account to which your travel should be charged, ask your business office.
- If you are adding any personal travel to your trip, the dates of the travel should be entered in the appropriate field. Adding personal travel will require that a comparison be attached to your report showing the cost of the airline ticket if the personal travel was not included. The comparison should be run prior to the actual travel. It is not possible to find comparable pricing for a time period in the past. If the comparison has not been documented before the travel, the traveler will need to run a comparison on dates and times that are similar. For example, if the original trip occurred during a high travel period, the comparison should also include high travel dates. Purdue will not pay for any additional costs due to personal travel.
- The traveler must complete the Request header and at least one segment of the travel. If the travel uses Airfare or Hotel for their one segment, it is not necessary for the dollar amounts entered to be correct. Since this is done prior to the trip, the cost will not be available, therefore in the request, the dollar amounts can be zero.
- Enter comments to explain anything that is out of the ordinary.
- A cash advance can be requested through the trip request but it is important for the traveler to know that a cash advance is a loan to the traveler. The travel needs to show that the advance was used for eligible expenses or the traveler will be required to pay back the university for the advance (loan). Using the cash for meals is not an appropriate reason for an advance. An advance can be

used for “museum fees”, ground transportation, or purchases that are business related but in areas that will not take a credit card.

- Once completed, the request should be submitted by the traveler. Delegate can assist travelers with completing these forms but the traveler should submit the request and report as least once before allowing the delegate to take over this responsibility.

Expense Report

- After submitting your request and having it approved, you can use the request to start your travel expense report. Information will be downloaded from your request into the report and will save the traveler time in starting the expense report.
- The first step in completing an expense report is to create an itinerary. The itinerary is used to determine the amount of per diem for which the traveler is eligible. The first and last days of the trip, the traveler receives 75% of the amount that Purdue allows for travel to the destination city. All others are received at 100 % allowable unless the traveler was provided a meal. In that case, the travel will need to exclude that meal and the adjustment will occur automatically. If the traveler does not have enough funding available for full per diem, they should click the small box on the top right hand corner of the per diem expense page and this will result in zero per diem through this page. It is still important to take this step because it shows travel the dates of your travel and what your per diem would have been if you chose to receive it in this manner. Adjusted per diem (less than allowed via the itinerary) can be entered as single line expense with a comment explaining the reason this was done. Due to IRS rules, the traveler cannot be reimbursed for individual meals. Meals are paid via per diem only.

- The following are helpful hints for creating your expense report.
 - If the Purdue travel card was used, the purchases made with the card can be imported into the report.
 - The use of a Purdue travel card can be used to pay for the traveler's meals but they expense must be designated as "Personal".
 - Receipts must be attached to all hotel/lodging expenses, airline, railroad travel and any purchases over \$75.00.
 - Hospitality paid via a travel card, must be completed the same way that it would be done if paid for with a Purdue P-card. The event will need to be identified, no alcohol can be purchased and attendees will need to be listed.
 - All receipts need to match the amount claimed. If this does not happen, a comment will be needed to explain the reason that it does not match.
 - A negative entry using "Reduction of Expense" can be used to reduce the amount claimed on a report.
 - Hotels need to be itemized. Each night of the stay must be listed. Charges on the receipt for laundry (if not eligible), food and movie rental, etc. must be marked as personal.
 - Expense methods of payment are one of the following:
 - JP Morgan Chase – Purdue Travel Card payment
 - Company Paid – Purchased outside concur using a P-Card and not a travel card
 - CASH – paid with either cash, personal check or person credit card. Any business expense paid for with cash, will be reimbursed to the traveler.
 - Any funding approval needs to be attached to the report. This can be a letter, memo or email.

- Study Abroad expense reports should have a copy of the program agenda attached to the report.
- Once your expense report is completed, submit the report. It will be sent to the CLA Concur Coordinator for approval and then to the appropriate business office. After the business office approves the report, it will go to the travel department.
- If the traveler is owed money, it will be direct deposited into their back account. If they owe money to the University, it will be deducted from their payroll check. There are limits as to how much can be deducted for an employee's check so if a large amount is owed, it will be deducted over a period of time until repaid. If a non-employee student owes the University, they will be required to pay the university for the amount due. Checks to the University should be taken to the appropriate business office so that they can be forwarded directly to the travel department.
- Any questions can be directed to your travel delegate or business office.
- Funding Abbreviations:

CLA	College of Liberal Arts
SIS	School of Interdisciplinary Studies
FVS	Film and Video Studies
MARS	Medieval Studies
RELS	Religious Studies
ASST	Asian Studies
JWST	Jewish Studies
LALS	Latino and Latin American Studies
ASAM	Asian American Studies
CMPL	Comparative Literature

WGSS	Women's Gender and Sexuality Studies
AAS	African American Studies
AMST	American Studies
LING	Linguistics
PHLT	Philosophy/Literature Studies
GLST	Global Studies
CCS	Counseling and Career Services
PLC	PLaCE
OEPP	Oral English Proficiency Program

Helpful Websites for more information on using Concur:

- To access concur: <http://www.purdue.edu/employeeportal/> and click on the concur icon.
- Concur users Traveler webpage:
<http://www.purdue.edu/business/travel/concur/index.html>
Check this website for information on when a comparison is required, what is needed if a family member accompanies the employee on the travel, etc.
- Frequently asked questions for concur:
<http://www.purdue.edu/business/travel/concur/faq/index.html>