

Purdue's travel process is moving from a manual, paper-based system to an electronic booking and expense system, called Concur Travel and Expense System. The new system is intended to:

- ➔ Implement a travel credit card program to reduce employee out-of-pocket travel expenses
- ➔ Increase service to travelers by integrating a travel agency, your travel card and the travel management system
- ➔ Automate booking, authorization and reimbursement

This document helps the infrequent traveler navigate the new system to manage business travel. To access:

- 1** Go to purdue.edu/employeeportal
- 2** Select the Concur icon and log in with your Career Account username and password

**NEED
MORE
HELP?**

Visit purdue.edu/business/travel/ for additional travel information, including the Cardholder agreement, Quick Reference Cards (QRCs) and Frequently Asked Questions (FAQs). Click on Training (QRCs), Travel Card or FAQs, located on the gray bar for Concur Users

Review QRCs: Complete or Edit Profile, E-Receipts, Set up your Mobile Device, Booking Travel and Complete Expense Report

Contact your departmental travel delegate or business office for support or email purduetravel@purdue.edu. Don't know your delegate? Log in to Concur. Select Profile tab. Click on Expense Delegates

QUICK HELP with CONCUR FOR THE INFREQUENT TRAVELER

WHAT SHOULD I DO FIRST?



OBTAIN A VISA TRAVEL CARD

- 1.** Complete the Cardholder Application (Appendix N) and forward to your department's business office ?
- 2.** Receive card in approximately 10 days
- 3.** Activate card by following instructions in new card packet

REVIEW YOUR CONCUR PROFILE AFTER RECEIVING CARD

- 1.** Log in to Concur through the Employee Portal purdue.edu/employeeportal
- 2.** Select the Profile tab on the blue navigation bar ?
- 3.** Make necessary corrections to your prepopulated Concur profile
 - a.** Click Personal Information
 - 1.** Ensure your name matches ID that you will use for identification at the airport
 - 2.** Add contact phone numbers, emergency info and frequent traveler programs
 - b.** Click E-Receipt Activation so that electronically generated travel receipts on your card load to your Receipt Store in Concur. Accept the E-Receipt Activation and User Agreement
 - c.** Click Mobile Registration to set up PIN. Download mobile app to upload receipts ?
 - d.** Check your delegates under Request Delegates and Expense Delegates to verify and add, as needed, staff who may help you with travel ?

For more
information
click on ?

WHAT SHOULD I DO WHEN I'M READY TO TRAVEL?



REQUEST PREAPPROVAL AND ACCOUNT NUMBER FROM YOUR SUPERVISOR

BOOK YOUR TRIP ?

(If not using Concur for reservations, skip to Step 7 below. Check Request and New Request) ?

1. Log in to Concur
2. Use the Trip Search feature on left side of My Concur tab
3. Enter search criteria for air, hotel and rental car, as needed
4. Review search results and make appropriate selections
5. Follow prompts to confirm booking. All selections will be charged to Visa Travel Card kept in your profile
6. Request Header appears once booking is confirmed
7. Complete Request Header Name (per departmental instructions)
 - a. Most fields will be populated with details from the booking
 - b. Enter primary account number for the trip and explain additional details in Comment box
 - c. If applicable, select the appropriate fund type under Preapproval Required for trips funded by ARO or DOE labs, or for international travel funded by EPA, AID, USDA, state or foreign governments
8. Add ALL estimated expenses (per diem, registration, mileage, shuttle, etc.) on the Expenses tab. Allocate to additional accounts, if needed
9. Submit the request

WHAT SHOULD I DO WHILE TRAVELING?



MANAGE RECEIPTS

1. Whenever possible, charge travel-related expenses to your Visa Travel Card
2. Save necessary receipts, such as hotel, rental car and expense receipts over \$75
3. Record paper receipts with the camera of your mobile device and upload via your Concur mobile app to your Receipt Store (some e-receipts will be automatically uploaded)

WHAT SHOULD I DO WHEN I RETURN?



CREATE AN EXPENSE REPORT AFTER ALL EXPENSES POST ?

1. Log in to Concur
2. Locate the appropriate Trip Request on the My Concur homepage under Active Work/Request tab
3. Click Create Expense Report icon on right side of Trip Request
4. Verify data transferred from the Trip Request to Expense Report Header
5. Link Trip Request to the Expense Report by clicking the box on the left side under Travel Requests with the appropriate trip name
6. Click Next to complete your allowance/itinerary ?
 - a. Enter the first leg of your trip: departure city, date, time, arrival city, date, time. Click Save
 - b. Repeat for each leg of your trip
 - c. Click Next>>. Click Next>> again
 - e. Check box for each meal provided to deduct from per diem
 - f. Click Create Expenses
7. Click Import to add ALL Smart Expenses (items purchased with Visa Travel Card) by dragging and dropping each item into the Expense Report
 - a. Click on the individual expense item to get detailed information
 - b. Complete all required fields and attach required receipts. A red exception icon indicates missing information
8. Click the New Expense button and select an expense type and complete all required fields, save itemizations, and attach required receipt. Repeat for each out-of-pocket expense
9. Allocate the charges after documenting ALL expenses
 - a. If single expense, click Allocate to assign account number(s)
 - b. If needed, click Add New Allocation to create additional accounts for distributing expense. Click Save
 - c. If multiple expenses, answer "Allocate the selected expenses" to the question "You have selected multiple expenses. What would you like to do?" Complete Step 9b
10. Review and click Submit to automatically route for approvals