

Travel Requests are not required for "Blanket Travel." The travel department defines Blanket travel as "any travel that does not include a common carrier ticket (air or train), and does not require a Travel Request or any pre-trip approval or notification." College/Unit leadership can narrow this definition, and provide the blanket travel expectations within a memo to the traveler. Confirm with your business office when travel requests are required, and when expense reports can be created without travel requests.

A new expense report is created when the traveler returns from the business trip, and the JP Morgan Chase Travel Visa card charges (associated with this trip) are listed in Concur (in the **Available Card Charges** or **Expense – View Charges**). To review all directions, follow the QRC page by page. To view information on a specific topic (within this QRC), click one of the following:

[Calculating Travel Allowance \(Subsistence\)](#)
[Importing Travel Visa Card Charges](#)

[Creating Expenses \(Non-Visa Travel Card Charges\)](#)
[Personal Car Mileage Expense](#)

[Allocations](#)
[Parking and Tolls](#)

If expense report is for mileage, subsistence and parking/tolls only, please follow [Create Mileage Only Expense Report](#) QRC.

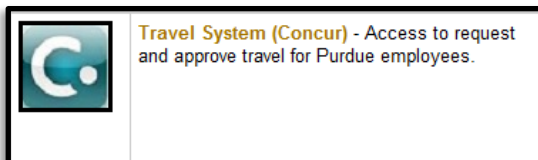
LOG IN TO CONCUR

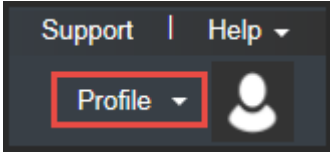
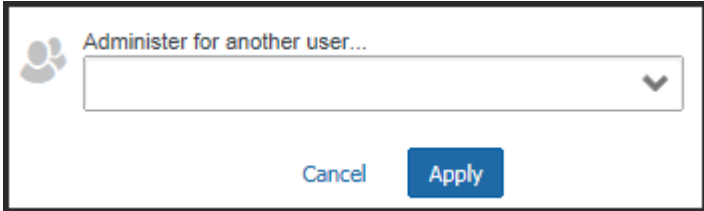
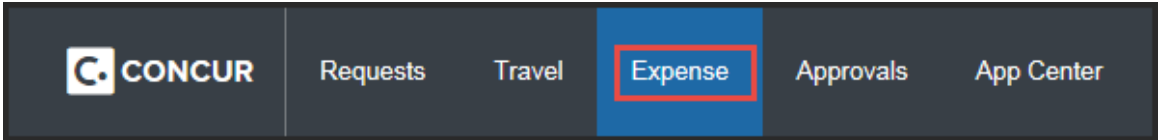

Go to the [Employee Portal](http://www.purdue.edu/employeeportal) at
www.purdue.edu/employeeportal

Choose Travel System (Concur).

Log in using Purdue career account login and password.

Click **Login**.



<p>If you are booking on behalf of another traveler, click Profile.</p>	
<p>Under Administer for another user... select user name from drop-down menu, or search by entering name.</p> <p>Click Apply.</p>	
<p>CREATING THE EXPENSE REPORT</p>	
<p>Select the Expense tab.</p>	
<p>Click Create New Report.</p>	

Complete all required fields on the **Report Header** (all required fields are noted with a heavy red bar).

Create a New Expense Report

Report Header

Report Name <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Report Date <div style="border: 1px solid black; padding: 2px;">01/28/2015</div>	Policy <div style="border: 1px solid black; padding: 2px;">US Expense Policy</div>	Purpose of Travel <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Travel Start Date <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Travel End Date <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Comment <div style="border: 1px solid black; height: 20px; width: 100%;"></div>			
<input type="checkbox"/> Fiscal or Campus Approver	Campus <div style="border: 1px solid black; padding: 2px;">West Lafayette</div>	Traveler Type <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Travel Type <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Account Assignment <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Approver Object <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	If personal travel is included, list dates <div style="border: 1px solid black; height: 20px; width: 100%;"></div>			

Report Name	Type a name. Use the naming convention supplied by business office (40 characters max).
Report Date	Automatically set to current date.
Policy	Defaults to US Expense Policy .
Purpose of Travel	Select best option from drop-down menu. Some selections (research related activities) require an explanation in the Comment section.
Travel Start Date	Type date or choose the date from the calendar.
Travel End Date	Type date or choose the date from the calendar.
Traveler Type	Select Employee (EMP) .
Travel Type	Select In State or Out of State .

Account Assignment is a required field. Click in the **Account Assignment** text box.

The **CODE** radio button is selected by default.

- Type an asterisk (*), followed by the account number.

Or

Search by **TEXT**:

- Change the radio button to **TEXT** and type an asterisk (*) followed by the account name.

Note: Use the primary and most restrictive account assignment. If all accounts are equally restrictive, list the account that is paying for the majority.

Tips:

- Use as many digits of the account assignment as possible.
- Use scroll bar at bottom of window to see account assignment name.

Additional cost assignments will be allocated within itemized expenses.

Select **Next >>**.

Calculating Travel Allowance (Subsistence) by Building an Itinerary

The **Travel Allowances for Report**, when completed, calculates subsistence for the travel event.

At minimum, two **New Itinerary Stops** must be created.

Travel Allowance is based on location of University business. Travel status must be 12 or more hours, to request subsistence. Review [Travel Webpage - Subsistence](#) for more information.

If subsistence is limited (below the CONUS rates) click Cancel. Enter the limited amount with the [Fixed Meal Expense](#) - Expense Type.

For all travel that does not include a flight, the itinerary must be built.

Complete:

- **Departure from (city)**
- **Date** of departure
- **Time** of departure
- **Arrive in (city)**
- **Date** of arrival
- **Time** of arrival

Click **Save** and repeat above steps for return travel.

Same day travel must exceed 12 hours to be eligible for Fixed Meals.

Travel Allowances For Report: WLaf to IPFW ✖

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: WLaf to IPFW Selection: USGSA

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

New Itinerary Stop

Depart from (city):

Date:

Time:

Arrive in (city):

Date:

Time:

The two lines below indicate subsistence will be calculated according to CONUS rates for Fort Wayne, Indiana on 1/14/2015.

Click **Next>>**.

Travel Allowances For Report: Trip from Indianapolis to Houston

1 Edit Itinerary
2 Available Itineraries
3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Trip from Indianapolis to Houstc

Selection
USGSA

Add Stop
Delete Rows
Import Itinerary

	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	West Lafayette, Indiana 05/15/2015 08:00 AM	Houston, Texas 05/15/2015 02:00 PM	HARRIS COUNTY, US-TX,...
<input type="checkbox"/>	Houston, Texas 05/16/2015 05:00 PM	West Lafayette, Indiana 05/16/2015 11:00 PM	TIPPECANOE COUNTY, U...

New Itinerary Stop

Depart from (city)
West Lafayette, Indiana

Date

Time

Arrive in (city)

Date

Time

Save

Go to Single Day Itineraries
Next >>
Cancel

Example of Itinerary that includes multiple business locations for subsistence:

Add Stop
Delete Rows
Import Itinerary

	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Indianapolis, Indiana 11/19/2012 10:54 AM	Newark apt, New Jersey 11/19/2012 12:59 PM	ESSEX COUNTY, US-NJ, US
<input type="checkbox"/>	Newark apt, New Jersey 11/19/2012 3:00 PM	Orlando, Florida 11/19/2012 6:00 PM	ORANGE COUNTY, US-FL, US
<input type="checkbox"/>	Orlando, Florida 11/23/2012 2:20 PM	Miami, Florida 11/23/2012 3:25 PM	MIAMI-DADE COUNTY, US-FL,...
<input type="checkbox"/>	Miami, Florida 11/23/2012 6:55 PM	Indianapolis, Indiana 11/23/2012 9:45 PM	MARION COUNTY, US-IN, US

New Itinerary Stop

Depart from (city)
Newark apt, New Jersey

Date

Time

Arrive in (city)

The **Assigned Itinerary** is displayed.

Click **Next>>**.

***If changes are required, click the displayed Itinerary and select **Edit**.*

Travel Allowances For Report: Trip from Indianapolis to Houston

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Trip from Indianapolis to Houston				
West Lafayette, Indiana	05/15/2015 08:00 AM	Houston, Texas	05/15/2015 02:00 PM	HARRIS COUNTY, US-TX, US
Houston, Texas	05/16/2015 05:00 PM	West Lafayette, Indiana	05/16/2015 11:00 PM	TIPPECANOE COUNTY, US-IN...

Available Itineraries

Current Itineraries ▼ Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous **Next >>**

Indicate the meals that were provide while traveling by selecting the appropriate boxes.

If personal travel was included, click the check box next to the date to **Exclude** travel allowance for entire day.

Travel Allowances For Report: Trip from Indianapolis to Houston

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to Go

Exclude | All ☐ Date/Location + Breakfast Provided Lunch Provided Dinner Provided Allowance

<input type="checkbox"/>	05/15/2015 Houston, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25
<input type="checkbox"/>	05/16/2015 Houston, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25

NOTE: Travel Allowance is automatically calculated at 75% for the first and last day of travel.

Click **Create Expenses**.

Travel Allowance is imported to Expense Report as **Fixed Meals**.

<< Previous **Create Expenses** Cancel

SMART EXPENSES: IMPORTING TRAVEL VISA CARD CHARGES

Smart Expenses (charges made to the Travel Visa Card) are automatically imported into the expense report, when applicable. **These charges usually match the booked segments in the travel request.

Click **OK**.

Smart Expenses



The selected items have been successfully imported as expenses.

☐ Never show this prompt again

OK

The Expense Report will open, with the Travel Visa Card charges already listed on the left side.

Click **Import** from the top menu, to view all Travel Visa Card charges. Check mark the box in front of the **Smart Expenses** that belong with this expense report, and click **Import**.

Expenses				Available Expenses			
<input type="checkbox"/>	Date	Expense	Amount	Requested	<input type="checkbox"/>	Expense Detail	Expense
<input type="checkbox"/>	01/14/2015	Personal Car Mile	\$140.30	\$140.30	<input type="checkbox"/>	Office Warehouse	Office Supplies
<input type="checkbox"/>	01/14/2015	Parking	\$75.00	\$75.00			



= Travel Visa Card charge



= E-Receipt



= Receipt attached



= Comment stated about expense



= Receipt Required

Or, another option, "drag and drop" the charges to the left side of the screen.

Expenses				Available Expenses			
<input type="checkbox"/>	Date	Expense	Amount	Requested	<input type="checkbox"/>	Expense Detail	Expense
<input type="checkbox"/>					<input checked="" type="checkbox"/>	Office Warehouse Nashville, TN	Office Supplies

NEW EXPENSES (NON-VISA TRAVEL CARD CHARGES)

For charges made outside the system or not associated with the Visa Travel Card, click **New Expense**.

+ New Expense

+ Quick Expenses

[Import](#)

[Details ▾](#)

[Receipts ▾](#)

[Print ▾](#)

Select **Expense Type** by scrolling through list, or type Expense in Search box.

New Expense
Available Receipts

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✓
Recently Used Expense Types

<div style="margin-bottom: 5px;">Local Phone</div> <div style="margin-bottom: 5px;">Airfare Expense</div> <div style="margin-bottom: 5px;">Meal Expense</div>	<div style="margin-bottom: 5px;">Internet Fees</div> <div style="margin-bottom: 5px;">Hotel</div>
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All Expense Types

<div style="margin-bottom: 5px;">Airfare</div> <div style="margin-bottom: 5px;">Airfare Expense</div> <div style="margin-bottom: 5px;">Airfare Ticket Tax</div> <div style="margin-bottom: 5px;">Airline Baggage Fees</div> <div style="margin-bottom: 5px;">Airline Fees</div> <div style="margin-bottom: 5px;">Booking Fees</div> <div style="margin-bottom: 5px;">Chartered Airfare</div> <div style="margin-bottom: 5px;">PU Airplane</div> <div style="margin-bottom: 5px;">Cash Advance</div> <div style="margin-bottom: 5px;">ATM Cash Advance</div> <div style="margin-bottom: 5px;">Cash Advance Card Fee</div> <div style="margin-bottom: 5px;">Communications</div> <div style="margin-bottom: 5px;">Cellular Phone</div> <div style="margin-bottom: 5px;">Internet Fees</div> <div style="margin-bottom: 5px;">Local Phone</div>	<div style="margin-bottom: 5px;">Mileage</div> <div style="margin-bottom: 5px;">Personal Car Mileage</div> <div style="margin-bottom: 5px;">Misc Trip Expenses</div> <div style="margin-bottom: 5px;">Copying</div> <div style="margin-bottom: 5px;">Health and Immunization</div> <div style="margin-bottom: 5px;">International Change Fees</div> <div style="margin-bottom: 5px;">Laundry</div> <div style="margin-bottom: 5px;">Materials</div> <div style="margin-bottom: 5px;">Meetings</div> <div style="margin-bottom: 5px;">Membership Dues</div> <div style="margin-bottom: 5px;">Miscellaneous</div> <div style="margin-bottom: 5px;">Office Supplies</div> <div style="margin-bottom: 5px;">Passport Fees</div> <div style="margin-bottom: 5px;">Postage / Shipping</div> <div style="margin-bottom: 5px;">Seminar Fees</div>
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Payment Type defaults to **Cash**, indicating the traveler used their personal funds to pay for this expense.

Select **Company Paid**, if a departmental card was used.

**If the Travel Visa Card was used, the charge should be imported into the Expense Report.

Type explanation in **Comment** box, if applicable

** Shuttle/Taxi/Subway - require a comment concerning to/from destinations

Select **Attach Receipt** to attach required receipt, if applicable.

Receipt Requirement information:

<https://www.purdue.edu/business/travel/Transportation/receipt.html>

Click **Save**

The screenshot shows the 'New Expense' form in Concur. The 'Expense Type' is set to 'Personal Car Mileage'. The 'Transaction Date' is empty. The 'Purpose of Travel' is set to 'Business meetings'. The 'Payment Type' is set to 'Cash'. The 'From Location' and 'To Location' fields are empty. The 'Distance : Amount' is set to '0' with a 'USD' dropdown. The 'Comment' box is empty. Below these fields, there is a section for 'Vehicle ID' (set to 'IRS Federal Rate Vehicle'), 'Number of Passengers' (set to '0'), and 'Distance to Date' (set to '0'). A 'Mileage Calculator' icon is visible. At the bottom, there are buttons for 'Save', 'Allocate', 'Attach Receipt', and 'Cancel'.

EXPENSE TYPES - PERSONAL CAR MILEAGE

Type **Transaction Date**, **Purpose of Travel**, **From** and **To Location**.

New Expense

[View Reimbursement Rates](#)

Expense Type: Personal Car Mileage

Transaction Date: 01/14/2015

Purpose of Travel: Business meetings

From Location:

To Location:

Payment Type: Cash

Distance : Amount

0 : 0.00

USD

Comment:

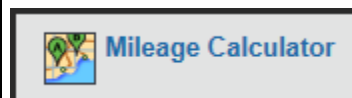
Select appropriate **Rate**. IRS Federal Rate Vehicle is default.

Vehicle ID: IRS Federal Rate Vehicle

Number of Passengers: 0

Distance to Date: 0

Click **Mileage Calculator**.



Type addresses for A, B and/or C
Waypoints.

Select **Make Round Trip**, if applicable.

Choose **Suggested Route** under
Directions.

Click **Add Mileage to Expense.**

Mileage Calculator

☐ Avoid Tolls
 ☐ Avoid Highways

Waypoints

A

401 S Grant Street, Freehafer Hall

×

B

2101 East Coliseum Blvd

×

C

401 S Grant Street, Freehafer Hall

×

D

×

122.8 MI

☐ Personal

121.6 MI

☐ Personal

Calculate Route

Directions

A

Purdue University, 1300 Cherry Lane, West Lafayette, IN 47907, USA

123 mi - about 2 hours 10 mins

1. Head southeast toward Cherry Ln	479 ft
2. Turn left onto Cherry Ln	0.5 mi
3. Turn left onto Northwestern Ave	0.9 mi
4. At the traffic circle, take the 1st exit onto Yeager Rd	0.2 mi
5. Turn right onto US-52 E/Sagamore Pkwy W	3.0 mi
6. Turn left onto Schuyler Ave	1.4 mi
7. Continue onto Hoosier Heartland Hwy	0.4 mi
8. Keep right to continue toward IN-25 N	384 ft
9. Slight right onto IN-25 N	33.2 mi
10. Continue straight onto Hoosier Heartland Hwy	4.4 mi

☐ Deduct Commute

TOTAL PERSONAL

0.0 MI

TOTAL BUSINESS

244.4 MI

Add Mileage to Expense

Cancel

Click **Save.**

Repeat above steps for each leg to be reimbursed.

****If traveler drove to several locations, s/he may have more than one **Personal Car Mileage Expense**. Create mileage for all stops to ensure the most accurate**

Save

Attach Receipt

Cancel

mileage reimbursement. **

EXPENSE TYPES – PARKING AND TOLLS

Type **Amount** (can be total amount towards parking and/or tolls, if total equals less than \$75.00).

Type **Comment** (explaining number of tolls, or parking total.)

Click **Save**.

New Expense Available Receipts

Expense Type: Parking Transaction Date: 01/14/2015 Business Purpose:

Vendor Name: City: Payment Type: Cash

Amount: 25.00 USD Is Required Receipt Included?: No

☐ Personal Expense (do not reimburse)

Comment:

ATTACH RECEIPTS


Receipts are required for all expenses totaling \$75.00 or more, and all lodging expenses.

Click expense to view details and click **Attach Receipt**, so it is matched with the expense type.

Save Add Itemization Attach Receipt Cancel

Browse to find your receipt or attach an image from the Receipt Store.

Click **Attach**.

Receipts attached at the Expense, contain the  icon.

Expense detail includes **Receipt Image** tab.

ALLOCATIONS

Expenses must be allocated prior to submitting the expense report. All funding sources must be listed in the allocations screen.



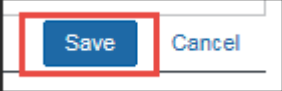
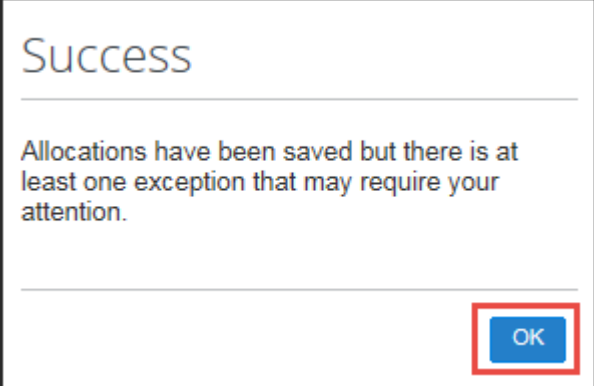
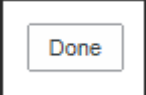
If different sources for funding are being used for each expense, allocate each expense individually.

Select expense and click **Allocate**.

If all expenses are being allocated uniformly, click check box at the top of **Expenses** list to select all of the **Expenses** on the **Expense Report**.

Select **Allocate** in the right hand box.

If allocating all expenses to one account, enter **Account Assignment**.



<p>If multiple accounts are paying for trip expenses, click Add New Allocation and Allocate By percentage or dollar amount.</p> <p>Enter corresponding account assignment information.</p>		
<p>Review totals in upper right for 100% allocation.</p>		
<p>Click Save.</p>		
<p>Click OK.</p>		
<p>Click Done.</p>		

To view Allocation totals, under **Details** click **Allocations**.

The screenshot shows the 'Details' menu in the Concur interface. The menu is open, displaying several options: 'Report' (with sub-items: Report Header, Totals, Audit Trail, Approval Flow, Comments), 'Cash Advances' (with sub-items: Available, Assigned), 'Allocations' (highlighted with a mouse cursor), and 'Travel Allowances' (with sub-items: New Itinerary, Available Itineraries, Expenses & Adjustments). The 'Details' tab is selected at the top of the menu.

Select **Summary** from the **View** drop-down under the **Expense List**.

The screenshot shows the 'Allocations for Report: Trip from India' page. The 'Expense List' section is visible, featuring buttons for 'Allocate Selected Expenses', 'Clear Selections', and 'View'. The 'View' button is clicked, opening a dropdown menu with two options: 'View All' and 'Summary'. The 'Summary' option is highlighted with a red box. Below the buttons, there is a 'Select Group' dropdown and a table with columns for 'Date', 'Expense', 'Group', and 'Amount'.

Allocation Summary displays:	<div>Allocation Summary</div> <table><tr><td>Account Assignment</td><td>SIO</td><td>Amount</td></tr><tr><td>(21010000/2002009000/None) General Operating ...</td><td></td><td>\$215.30</td></tr></table>	Account Assignment	SIO	Amount	(21010000/2002009000/None) General Operating ...		\$215.30
Account Assignment	SIO	Amount					
(21010000/2002009000/None) General Operating ...		\$215.30					
Once expenses are allocated, the Allocation Icon  is viewable. Expenses marked "Personal Expense" will not contain the Allocation Icon .	<div><div><input type="checkbox"/></div><div>01/14/2015</div><div>Personal Car Mileage</div><div>\$140.30</div><div>\$140.30</div></div> <div></div>						
REVIEW DETAILS							
Review report to ensure that all exceptions have been cleared and that all expenses have been accounted for in the detail.							
<p>Select Report Header from the Details button to review/edit Report Header information. Add comments, if applicable.</p> <p>Select Totals from the Details button to review Amount due Employee and other Disbursement detail.</p> <p>Select Expenses & Adjustments to review Fixed Meals (subsistence).</p> <p>In the event the itinerary was missed and no travel allowance was generated, click Details and select New Itinerary.</p>	<div><div>DetailsReceiptsPrint</div><div><div>Report</div><div>Report Header</div><div>Totals</div><div>Audit Trail</div><div>Approval Flow</div><div>Comments</div><div>Allocations</div><div>Allocations</div><div>Travel Allowances</div><div>New Itinerary</div><div>Available Itineraries</div><div>Expenses & Adjustments</div></div></div>						

SUBMIT

One expense report is complete, click **Submit Report**.

Delete Report

Submit Report

Report Totals are listed and can be reviewed.

Report Totals - Trip from Indianapolis to New York

Expense Report

Report Total :	\$1,359.30
Less Personal Amount :	\$45.76
Amount Claimed :	\$1,313.54
Amount Rejected :	\$0.00

Company Disbursements

Amount Due Employee :	\$177.50
Amount Due zNot Used-Corporate Card IBCP (offsets not used) :	\$1,136.04
Total Paid By Company :	\$1,313.54

Employee Disbursements

Amount Owed Company :	\$0.00
Amount Owed Company Card zNot Used-Corporate Card IBCP (offsets not used) :	\$45.76
Total Owed By Employee :	\$45.76

Close

If you are completing the expense report on behalf of someone else, click **Notify Employee**.

An e-mail is sent immediately to the employee.

NOTE: The traveler must submit his/her own **Expense Report**.

Delete Report

Notify Employee

APPROVALS

Traveler and delegates receive several "changed status" e-mails:

- Fiscal Approval Approved
- In Accounting Review (Central Travel Office Approval)
- Expense Report is Extracted (Approved and being prepared for disbursements – payment status is set to "Paid")

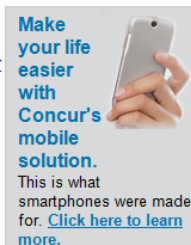


Your expense report listed below has changed status.

Changed By	Fiscal Approver	
Report Name	108 NewAlbany	IN 2/15/2013
Report Date	2/19/2013	
Submit Date	2/19/2013	
Amount Approved	34.50 USD	
Approval Status Set To	Approved	
Payment Status Set To	Not Paid	

Link To Expense

<https://www.purdue.edu/apps/account/SAMLPost/concur>



Expense report statuses are updated within the **Expense** tab.

Submitted reports will contain a description of where the report is awaiting approval.

The screenshot shows the Concur web interface. At the top, there are tabs for 'CONCUR', 'Requests', and 'Expense' (which is selected). Below the tabs, there are links for 'Manage Expenses' and 'View Transactions'. The main section is titled 'Active Reports'. On the left, there is a large dashed orange box containing a red plus sign and the text 'Create New Report'. On the right, there is a report card. At the top of the card, it says 'SUBMITTED' in a green box with the date '01/27/2015'. Below that, the amount '\$1,000.12' is displayed. At the bottom of the card, there is a yellow warning icon followed by the text 'Exceptions' and 'Approved & In Accounting Review'.

To view reports which have already been paid to the traveler, select **Expense** tab and click **Report Library**.

This screenshot shows the Concur web interface with the 'Expense' tab selected. In addition to the 'Manage Expenses' and 'View Transactions' links, a 'Cash Advances' link with a dropdown arrow is now visible. The 'Active Reports' section is at the bottom. On the right side of this section, there is a blue button labeled 'Report Library' with a right-pointing arrow, which is highlighted with a red box.

The default view will only display the last 30 days of submitted reports.

To view all reports, click **View** and select **All Reports**.

