

Travel Guide

Transition to Central Travel for Travelers, Delegates, & Fiscal Approvers



College of Engineering

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Introduction

Expense report preparation will be moved to Central Travel starting November 15, 2021. This newly formed team will be comprised of a dedicated staff that will perform expense report creation on behalf of travelers and delegates. This change will decrease the amount of time for travelers to receive their reimbursement and reduce the time commitment of expense report administration on the Business Offices and Procurement Center.

Responsibilities

The table below outlines the responsibilities of each individual during the preparation and completion of each expense report.

Task	Responsible Party		
	Traveler or Delegate	Purdue Travel	Business Office
Provide travel documentation electronically within 10 business days of travel return date	X		
Create expense report		X	
Email traveler or delegate that expense report is ready for review in Concur		X	
Review and approve the expense report within 2 business days, or contact Purdue Travel to resolve issues about report	X		
Receive automated email from Concur to review expense report for fiscal approval			X
Review the account assignment for availability of funds and proper account use			X
Receive automated email from Concur that expense report has been processed and sent for payment	X		
Follow up with traveler or delegate (automatic) when receipts have not been submitted within 10 business days of return travel date		X	X
Continued follow up with traveler or delegate until travel expenses are submitted		X	
Escalate issue of travel expenses not being submitted within 60 days		X	X
Travel card requests and increases		X	X

Traveler & Delegate Resources

Booking Travel

Concur and Anthony Travel remain the preferred method of booking travel. Both methods allow travelers to take advantage of discounts that may not otherwise be available. Further, utilizing this method to book travel allows for expedited expense report submission and reimbursement.

If booking outside of Concur or Anthony Travel, the traveler will not have access to the same discounts, expense reimbursement can be delayed, and there is no record of travel on file with Purdue to assist in locating the traveler in the event of an emergency.

Updating Your Traveler Profile

For assistance with these updates to your traveler profile, please see the [Traveler Profile in Concur QRG](#). This guide will assist travelers with:

- Updating Name, Phone, Email
- Updating Frequent Traveler Program information.
- Email Address Validation
- Updating Delegates/Arrangers
- Updating Email Preferences
- Enabling E-Receipts

Booking Travel in Concur Quick Reference Guide

This QRG provides the steps for travelers and/or delegates to book travel and complete the Travel Request in Concur Travel and Expense. [Click here](#) to view the QRG.

Contact Anthony Travel 24/7 for any unexpected circumstances or last-minute changes to travel arrangements by calling 765-496-TRIP (8747).

If you have any questions, please email purduetravel@purdue.edu.

Please Note: When booking travel in Concur, the request must be submitted within 24-hours or the reservation will be cancelled. Additionally, please ensure "Preapproval Required" is not checked in the Request Header as this will create additional delays in processing your travel request – This field should state "None."

Submitting Travel Expenses

A traveler's expense report will be created by Purdue Travel. Travelers and delegates will still have the option to create the expense report themselves; however, using the Purdue Travel team is preferred. If you wish to create your own expense report, you can find the QRG by [clicking here](#).

If travel was booked using Concur/Anthony Travel, Purdue Travel will contact the traveler and delegate one week after the trip ends to start the reimbursement and receipt collection process.

If Concur/Anthony was not used to book, upon returning from business travel, the traveler or delegate must submit expense receipts for reimbursement by emailing them in one email to purduetravel@purdue.edu. Please use this format in the subject line:

Department/FirstInitial.LastName/Destination/Conference/FirstDateOfTravel

The traveler or their delegate is responsible for providing all required information to Purdue Travel. Upon returning from business travel, the traveler or their delegate must submit expenses for reimbursement following the steps on the next page.

Traveler Training

Training is available for how to use Concur, booking trips, and submitting expense reports. This travel training is in Success Factors under TRVLC 200 – Concur Traveler Training.

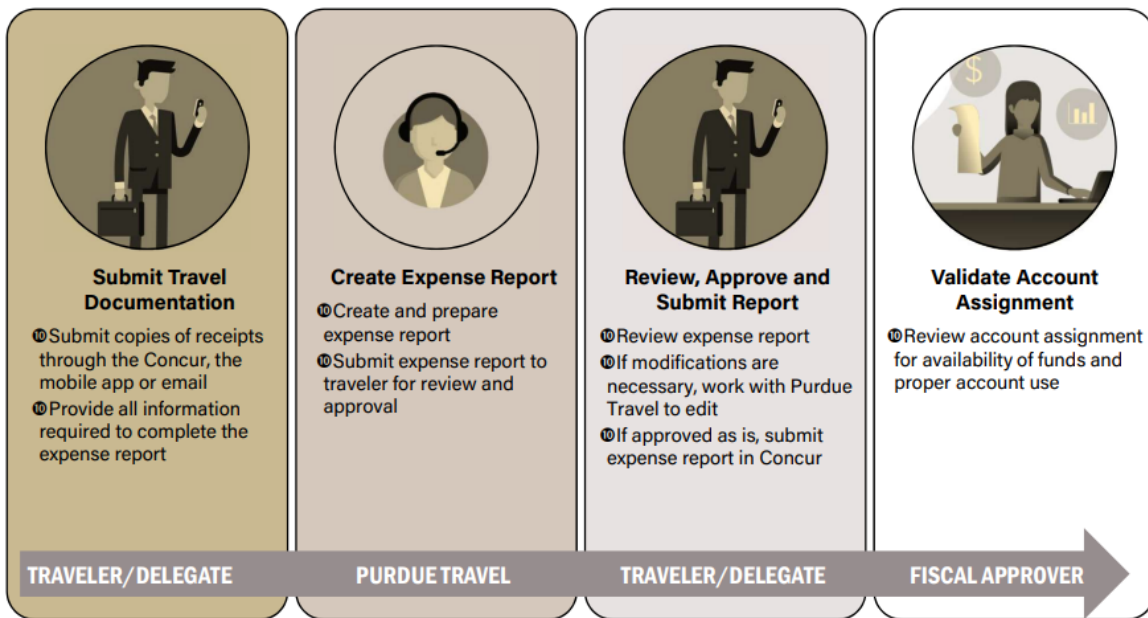
Process: Submitting Travel Expenses

1. Add all business expense receipts to the receipt store in the Concur Mobile App / Concur Website

OR

Attach all receipts in one email to purduetravel@purdue.edu with the subject line:
Department/FirstInitial.LastName/Destination/Conference/FirstDateOfTravel

2. The traveler will receive an email from Purdue Travel that the expense report is ready for review and submission.
 - a. The traveler or delegate is responsible for reviewing and submitting the travel expense report within 48 hours of receipt unless modifications are needed (Step 3).
3. If modifications are needed, the traveler/delegate will respond to the email with what changes are necessary to correct the expense report.
 - a. Please double check that appropriate State/Federal rates were used at this stage per your Project Requirements.
4. Once submit in Concur, the report is sent to the Business Office for Fiscal Review through Concur.



Creating Your Own Expense Report

For those who wish to create their own expense report, please use this titling convention:

Department/FirstInitial.LastName/Destination/Conference/FirstDateOfTravel

Be sure to include any department-specific reports, approvals, or forms required by your department. These reports will first route to be reviewed by the Central Travel team and then validated/approved by your Business Office.

Purdue University Travel Cards

The Purdue University Travel Card (TCard) is available for faculty and staff who travel on official University-related business. The TCard provides an efficient cost-effective method to procure travel and travel-related services.

The TCard is Purdue's preferred reservation and payment method for all University travel. All purchases made using the card must adhere to **Purdue Travel Regulations**.

The below monthly-cycle card limits for travelers were established based on the business need and on the frequency of travel required. An individual must travel or attend virtual conferences on average three or more times per year to be issued a travel card. If you need a travel card limit increase, please complete **this survey**. Be sure to include your Business Manager's name and email. If you do not know this information, please contact your Business Office.

Travel Tier	Establish Amount
Tier 1 - Very infrequent (Less than 3x yearly)	Will not be provided a card.
Tier 2 - Occasional (3-5x yearly)	Card will be established at \$1 and increased based on travel occurring.
Tier 3 - Infrequent with domestic travel only	\$1,000-\$5,000
Tier 4 - Moderate with domestic and some foreign travel	\$6,000-\$10,000
Tier 5 - Road warrior with domestic and foreign travel	Amount varies based on need and calculated based on historical spend history for the individual traveler.

NOTE: Study Abroad participants should reference the **Purchasing Card Manual** for a Study Abroad card.

The **Travel Card Manual** contains all requirements, policies, and procedures regarding the use of this card.

Fiscal Approver Resources

Review and Approve Expense Reports

The **Review & Approve Expense Reports in Concur QRG** is the most up-to-date resource available for questions regarding the Fiscal Approval processes for expense reports.

If you have additional questions, please email purduetravel@purdue.edu.

Role of the Engineering Procurement Center

The Engineering Procurement Team can still help answer questions or provide basic assistance with your travel requests as needed. If you have general questions regarding the process, please email engrtravel@purdue.edu.

The Procurement Team will no longer be involved in the creation, submission, or review of expense reports.

Travel Card Applications

The link to the Travel Card Application is located on our Procurement Operations Center website located here. Please follow the instructions carefully and send to engrpcard@purdue.edu once complete.

Travel Card Increases

If one of your department staff, faculty, or students request a TCard limit increase, you may submit this request using the following survey:

https://purdue.ca1.qualtrics.com/jfe/form/SV_cM8AmmSrYyFX4t8

Please note these requests are not guaranteed at the amount requested. The Engineering Procurement Center has no control over the amount of time the request takes to process nor the result of the request.

Cards are issued and limits are set according to [this guidance](#).

Additional Resources

[Central Procurement Website](#)

[COVID-19 Resources](#)

[Central Travel Website](#)

[Concur Quick Reference Guides](#)

[Engineering Procurement/Travel Website](#)

[Travel Trainings](#)

[Travel Regulations](#)