Use this QRC when you are completing a Blanket travel expense report. Blanket travel is defined in ICA as same day trips.

LOG IN TO CONCUR

Go to the Employee Portal at www.purdue.edu/employeeportal

Choose Travel System (Concur).

Log in using Purdue career account login and password.

Click Login.

If you are booking on behalf of another traveler, click Yourself.

Travel System (Concur) - NOTE: Only available if you have been trained on this application; this is in the process of being rolled out to all areas. Access to request & approve travel for Purdue employees.

Welcome, Susan Slaybaugh  [ You are administering for: Yourself ]
From the drop-down list, select the individual on whose behalf you are booking.

CREATING THE EXPENSE REPORT

Select the Expense tab.

Click New Expense Report.

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

Type a name. Use the naming convention supplied by business office (40 characters max).

The naming convention for Intercollegiate Athletics is: ICA-LastName-City,State-1st Date of Travel. Example: ICA-Burke-Chicago,IL-8/5/2013

**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 of the cost. Additional cost assignments will be allocated within itemized expenses.

Choose the correct fund/cost center combination from list generated by Concur.

**Tips**:
- Use as many digits of the account assignment as possible.
- Use scroll bar at bottom of window to see account assignment name.
- Refer to the business office with questions about account assignments.

Select **Next >>**.
TRAVEL ALLOWANCE

Click **Cancel**.

Concur provides three steps to follow to calculate per diem, based on business location.

ICA uses a flat $46.00 per diem rate.

SMART EXPENSES

*Smart Expenses* (charges made to the Visa Travel Card) are automatically imported.

To associate a Smart Expense with the expense report, click the item and drag and drop to **Expenses** on the left side of the screen.
Click **OK**.

Items that are missing information or that require additional information will be marked with a red exception 🚨 icon. Click the icon to view what additional information is needed.

Once an expense is selected, complete all required information that is marked with a red bar.

Click **Save**.

**NEW EXPENSES**

For charges made outside the system or not using the Visa Travel Card, click **New Expense**.
Select **Expense Type**.

Complete required fields.

Click **Save**.

Follow the **Attach Receipts** section in the QRC to attach required receipts to expenses, when required.

Provide comments in the comment box, if further explanation of expense type is needed.
PERSONAL CAR MILEAGE

Select **Personal Car Mileage** under **New Expense**.

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

Select appropriate **Rate**. IRS Federal is default. If other rates are applied in your area, they should be listed in the drop-down selection. Contact your business office or purduetravel@purdue.edu to add other rates.

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.

Click Save.

**If the 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 mileage reimbursement. **
ICA Per Diem

If in travel status for over 12 hours, Click Fixed Meal Expense, from Expense Type list, for single day per diem.

Type or select Transaction Date. Type per diem in Amount.

Per Diem Key

- First and last day of travel per diem is 75% of $46.00 = $34.50
- $46.00 per diem rate =
  - $7.00 breakfast
  - $11.00 lunch
  - $23.00 dinner

Click Save.
**Personal Expenses**

Any expense charged to the Visa Travel Card that was incurred as a personal expense, must be identified as such.

In Expense details, click **Personal Expense (do not reimburse)** check box to mark charge as personal.

This reduces the reimbursement amount to employee by the total amount of personal expenses.

**NOTE:** Meal expenses must be marked as personal. Purdue University pays per diem and does not reimburse individual meal expenses.

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

Click **Attach**.

**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.

Allocate by **Percentage** or **Dollar Amount** and enter appropriate account assignments for each allocation.

Click **Save**.
When allocations are complete, click **Ok**, and then **Done**.

When allocating by an amount, Concur translates the amount into a percentage (after the allocation has been saved).

To review the allocations by dollar amount, click the **Summary** button located within the Allocation for Request.
**SUBMIT EXPENSE REPORT**

Review report to ensure that all exceptions have been cleared and that all expenses have been accounted for in the detail.

To review or make changes to the header, click **Details** and select **Report Header**.

In the event the itinerary was missed and no travel allowance was generated, click **Details** and select **New Itinerary**.

If you are completing the expense report for yourself, click **Submit Report**.

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

**NOTE**: The traveler must submit his/her own **Expense Report**.
**Report Totals** are listed and can be reviewed.

**Approvals**

Traveler receives email notification from Concur once expense report is approved by fiscal approver.

[Image of Concur email notification with details about the approved expense report.]
Traveler receives email notification from Concur once expense report is approved by the central travel office approver.

<table>
<thead>
<tr>
<th>Concur®</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Your expense report listed below has changed status.</strong></td>
<td></td>
</tr>
<tr>
<td>Changed By</td>
<td>Central Travel Office Approver</td>
</tr>
<tr>
<td>Report Name</td>
<td>108 New Albany IN 2/15/2013</td>
</tr>
<tr>
<td>Report Date</td>
<td>2/19/2013</td>
</tr>
<tr>
<td>Submit Date</td>
<td>2/19/2013</td>
</tr>
<tr>
<td>Amount Approved</td>
<td>34.50 USD</td>
</tr>
<tr>
<td>Approval Status Set To</td>
<td>Approved</td>
</tr>
<tr>
<td>Payment Status Set To</td>
<td>Not Paid</td>
</tr>
</tbody>
</table>

**Link To Expense**

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

Traveler receives email notification from Concur once expense report is extracted from Concur and sent to SAP for any reimbursement amount due to traveler.

<table>
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</thead>
<tbody>
<tr>
<td><strong>Your expense report listed below has changed status.</strong></td>
<td></td>
</tr>
<tr>
<td>Changed By</td>
<td>Concur System</td>
</tr>
<tr>
<td>Report Name</td>
<td>108 New Albany IN 2/15/2013</td>
</tr>
<tr>
<td>Report Date</td>
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