Concur – Travel Expenses Charged to the Procurement Card

When a travel expense is charged to a procurement card, it must be allocated to a travel Expense Type. When the Travel Expense Type is selected, the correct Trip Purpose and Traveler Type need to be selected for proper allocation and reporting. This applies to travel expenses for UK employees and non-UK employees.

Procedures

When a travel expense is charged to the procard, it is important to select the appropriate Expense Type, Trip Purpose, and Traveler Type.

Create the appropriate report and add the travel expense to the report.

NOTE: If the vendor is recognized as a travel vendor, Concur may start the expense with a suggested Expense Type. Be certain the expense type is correct

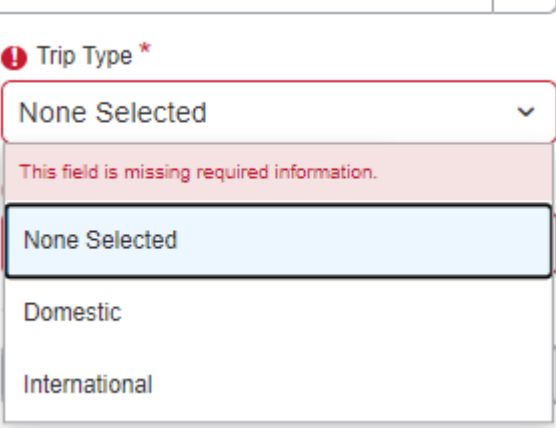## Concur – Travel Expenses Charged to the Procurement Card

Click on the transaction to go to the Expense Details tab.

If the vendor is recognized by Concur as a travel vendor, Concur may start the expense with a suggested Expense Type. Verify the suggested Expense Type is correct or select a new travel Expense Type from the dropdown list.

If the expenses starts with Undefined listed as the Expense Type, choose the appropriate travel Expense Type from the dropdown list.

Details	Itemizations

⊘ Allocate

* Required field

Expense Type *

Airfare ⌄

Transaction Date	❗ Trip Type *
06/17/2020	None Selected ⌄

❗ Trip Purpose *	❗ Traveler Type *
None Selected ⌄	None Selected ⌄

Additional Information	Vendor
	VIRGIN ATLANTIC ⌄

Ticket Number	Vendor Name
	VIRGIN ATLANTIC

❗ Destination City *	Payment Type
⊕ ⌄	TEST-University Procard

Amount	Currency
1,370.64	US, Dollar

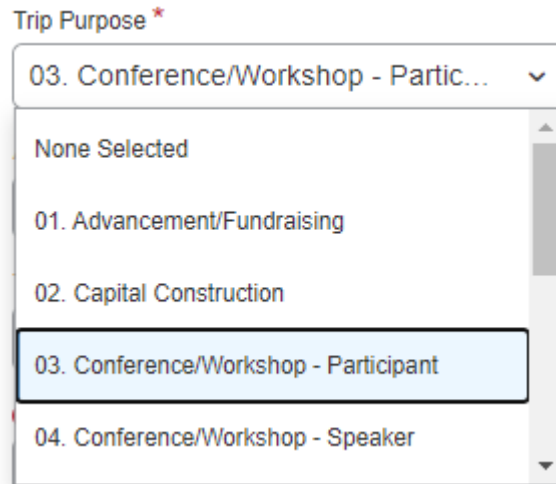| Transaction ID	Related Request/Expense Report ❓
T8ed37c04	

Customer Code/Order #

Comment

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Here is a list of the available travel Expense Types in Concur.	**Available Travel Expense Types:** **Category 1: Travel & Transportation Expenses** Airfare Car Rental Hotel Hotel-Group Train Travel Registration Fees **Category 2: Other Travel Expenses** Airline Fees Airline Seat Fees Baggage Fees Booking Fees Fuel Miscellaneous Travel Expense Parking Public Transport Taxi Tolls/Road Charges Travel Visa Fees
For travel expense types, 4 additional fields will become mandatory: Trip Type, Trip Purpose, Traveler Type, and Destination City. Choose the appropriate Trip Type from the dropdown menu.	 **Available Trip Types:** Domestic International

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Choose the appropriate Trip Purpose from the dropdown list.	**Trip Purpose** *
	
	 03. Conference/Workshop - Partic... ⌄
	
	 None Selected
	
	 01. Advancement/Fundraising
	
	 02. Capital Construction
	
	 03. Conference/Workshop - Participant
	
	 04. Conference/Workshop - Speaker
	
	 Available Trip Purposes:
	
	    01.Advancement/Fundraising
	    02.Capital Construction
	    03.Conference/Workshop – Participant
	    04.Conference/Workshop – Speaker
	    05.Group/Team Travel
	    06.Meeting/Collaboration
	    07.Other Travel
	    08.Recruiting
	    09.Research/Teaching
	    10.Agriculture Ext-County Travel**
	    11.Agriculture Ext-Professional Improvement**
	
	 ** The Agriculture Ext trip purposes will only be available for employees of the College of AG.

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Choose the appropriate Traveler Type from the dropdown menu.	Traveler Type * 01. Employee None Selected 01. Employee 02. Nonathletic Group/Team 03. Student 04. Official Guest **Available Traveler Types:** 01. Employee 02. Nonathletic Group/Team 03. Student 04. Official Guest 05. Candidate/Future Employee 06. Future Student 07. Patient 08. Research Advisory Board 09. Research Participant Support 10. Research Subject 11. Visiting Speaker 12. Athletics Group/Team Travel Away 13. Athletics Group/Team Travel Home
The Trip Purposes and Traveler Types need to be used together correctly in Concur. Here is a grid of which Trip Purposes and Traveler Types can be combined on a transaction.	(table below)

	Employee	Nonathletic Group/Team	Student	Official Guest	Candidate/Future Employee	Future Student	Patient	Research Advisory Board	Research Participant Support	Research Subject	Visiting Speaker	Athletics Group/Team Travel Away	Athletics Group/Team Travel Home
Advancement/Fundraising	X		X	X			X	X	X	X			
Capital Construction	X												
Conference/Workshop-Participant	X		X	X					X				
Conference/Workshop-Speaker	X		X								X		
Group/Team Travel		X										X	X
Meeting/Collaboration	X		X	X				X	X	X	X		
Other Travel	X		X	X				X	X	X	X		
Recruiting	X				X	X							
Research/Teaching	X		X	X				X	X	X	X		
Agriculture Ext-County Travel	X												
Agriculture Ext-Professional Improvement	X												

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Start typing the business destination and choose the location from the dropdown menu.	

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Complete the remaining expense detail fields. Be certain to add the business purpose of the trip to the Comment field.

As a reminder, if the expense requires itemization and allocation, the itemization must be completed before the allocation.

Click Save Expense.

Continue adding additional transactions to the report.

Details	Itemizations

⊘ Allocate

* Required field

Expense Type *

Airfare ⌄

Transaction Date

06/17/2020

Trip Type *

Domestic ⌄

Trip Purpose *

03. Conference/Workshop - Partic... ⌄

Traveler Type *

01. Employee ⌄

Additional Information

Vendor

VIRGIN ATLANTIC ⌄

Ticket Number

Vendor Name

VIRGIN ATLANTIC

Destination City *

⊕ ⌄ London, UNITED KINGDOM

Payment Type

TEST-University Procard

Amount

1,370.64

Currency

US, Dollar

Transaction ID

T8ed37c04

Related Request/Expense Report ❓

Customer Code/Order #

Comment

Attending conference in London to learn advanced skills in my area of expertise.

Last Revision Date: 07/20/2021

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