

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.

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			TEST-University Procard	Airfare	Virgin	06/17/2020	\$1,370.64
							\$1,370.64

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

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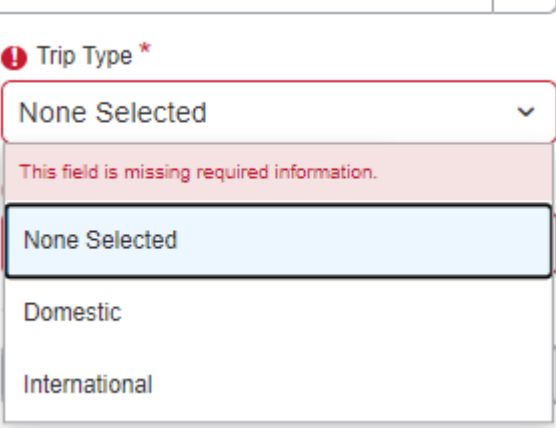
Click on the transaction to go to the Expense Details tab.

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.

The screenshot shows the 'Expense Details' tab of a Concur interface. At the top, there are two tabs: 'Details' (selected) and 'Itemizations'. Below the tabs is an 'Allocate' button with a circular icon. A '* Required field' indicator is present in the top right corner. The form contains several input fields and dropdown menus, some of which are highlighted with red boxes and error icons (a red circle with an exclamation mark). The fields and their values are: Expense Type (Airfare), Transaction Date (06/17/2020), Trip Purpose (None Selected), Trip Type (None Selected), Traveler Type (None Selected), Vendor (VIRGIN ATLANTIC), Vendor Name (VIRGIN ATLANTIC), Payment Type (TEST-University Procard), Currency (US, Dollar), Amount (1,370.64), Transaction ID (T8ed37c04), and Related Request/Expense Report (empty). There is also a 'Destination City' field with a globe icon and a dropdown arrow, and a 'Customer Code/Order #' field. A 'Comment' field is located at the bottom of the form.

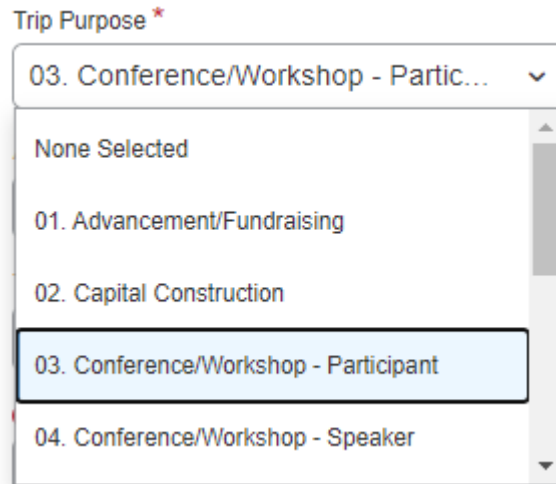
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<p>Here is a list of the available travel Expense Types in Concur.</p>	<p>Available Travel Expense Types:</p> <p>Category 1: Travel & Transportation Expenses Airfare Car Rental Hotel Hotel-Group Train Travel Registration Fees</p> <p>Category 2: Other 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</p>
<p>For travel expense types, 4 additional fields will become mandatory: Trip Type, Trip Purpose, Traveler Type, and Destination City.</p> <p>Choose the appropriate Trip Type from the dropdown menu.</p>	 <p>Available Trip Types: Domestic International</p>

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Choose the appropriate Trip Purpose from the dropdown list.

Trip Purpose *



03. Conference/Workshop - Participant

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.

	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.

The screenshot shows a web form with the following fields and elements:

- Destination City ***: A red error icon is present. The input field contains "London, |" and is highlighted with a red border.
- Amount**: The input field contains "1,370.6". A red error message "This field is missing required information." is displayed above the field.
- Transaction**: The input field contains "T8ed37".
- Dropdown Menu**: A list of location options is shown, with "London, UNITED KINGDOM" selected and highlighted in blue. Other options include Boston, Massachusetts; Orlando, Florida; Cincinnati, Ohio; London, Ontario; London, Ohio; London, Kentucky; and LONDON, Arkansas.
- Comment**: A label for a text area is partially visible at the bottom.

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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.