PURDUE UNIVERSITY

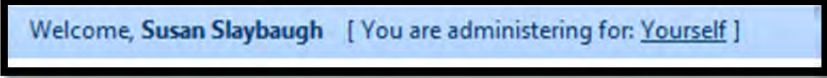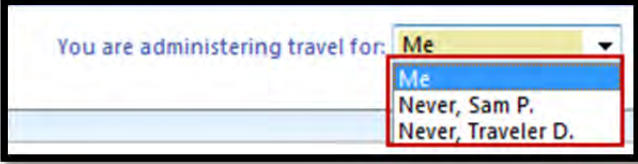# Booking Travel in Concur® Travel and Expense

This QRC provides the steps for travelers and/or their delegates to book travel and complete the Request Header in Concur Travel and Expense.

Log In To Concur

<table>
<tr>
<td>
Go to the **Employee Portal** page.

Choose **Travel System (Concur)** to log in to Concur using Purdue Career Account and password.

Enter Career Account ID and password.

Click **Login**.
</td>
<td>
www.purdue.edu/employeeportal

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*

PURDUE
U N I V E R S I T Y™

Log in using your Purdue Career Account

Login:

Password:

Login

To access the page you are requesting, a valid Purdue University career account Username and Password must be provided.
</td>
</tr>
</table>

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

Welcome, **Susan Slaybaugh**   [You are administering for: Yourself]

From the drop-down list, select the individual on whose behalf you are booking.

You are administering travel for: Me

Me
Never, Sam P.
Never, Traveler D.

Book Travel

Note: Before you begin booking travel, know the following:

- Your departmental rules regarding travel
- All funding source accounts paying for the trip
- Trip or conference details

In **My Concur**, start booking your trip under **Trip Search**:

Click **Round Trip**, **One Way** or **Multi-Segment** radio button.

Enter **Departure City** (defaults from profile).

Enter **Arrival City**.
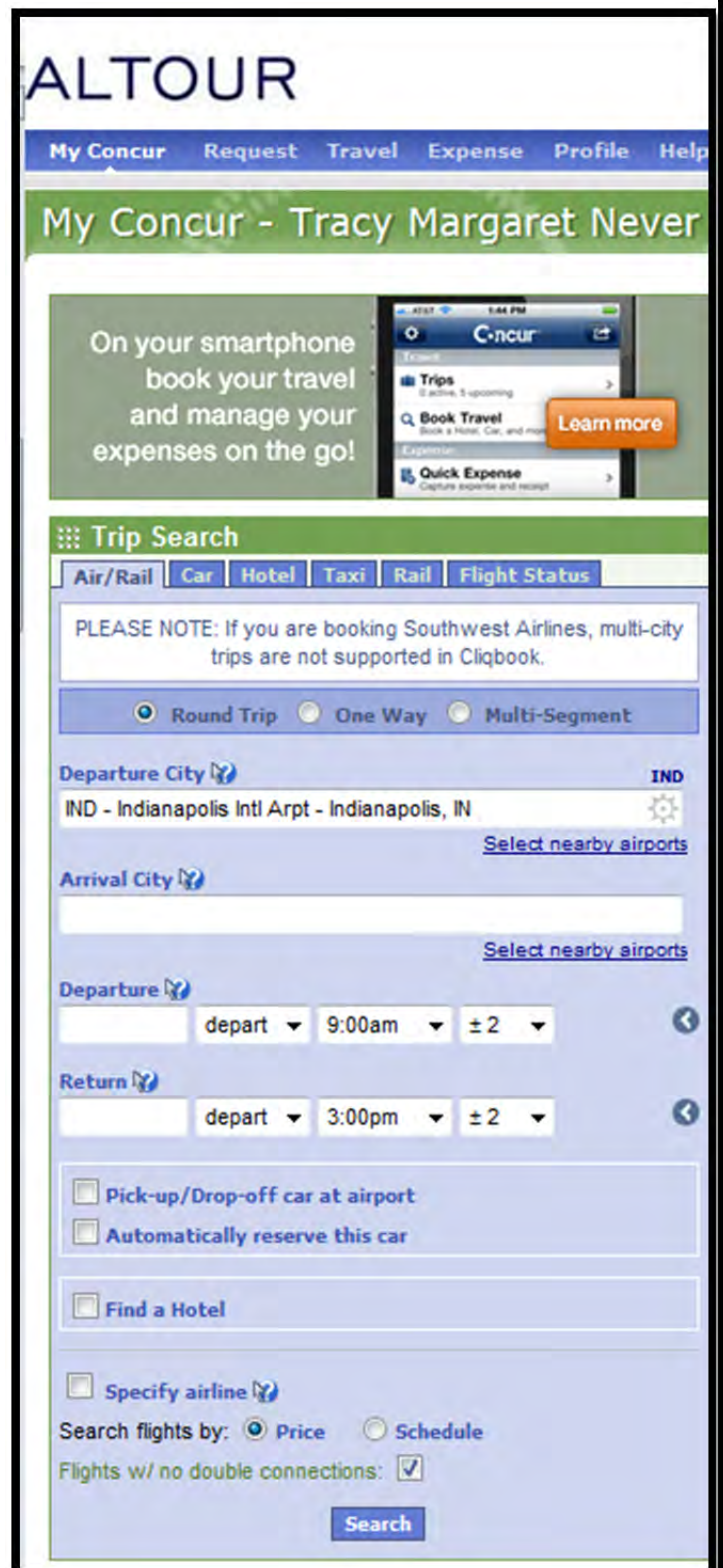
Enter **Departure** date and time window.
Note: When searching, the time window defaults to ±2, this can be changed up to a window of ±12 hours.

Enter **Return** date and time window.

Select **Pick-up/Drop-off car at airport** checkbox, and the **Automactically reserve this card** checkbox if you need to reserve a vehicle.

Select the **Find a Hotel** checkbox, if you need hotel accommodations.

Using the **Class of service** drop-down, choose economy class unless you need to fly business class for medical or other approved exception that is on file in the Business Office.

Enter all your roundtrip details to start the booking process.

Click **Search**.

Trip Search

Air/Rail | Car | Hotel | Taxi | Rail | Flight Status

PLEASE NOTE: If you are booking Southwest Airlines, multi-city trips are not supported in Cliqbook.

○ Round Trip   ○ One Way   ○ Multi-Segment

Departure City   IND
IND - Indianapolis Intl Arpt - Indianapolis, IN
Select nearby airports

Arrival City   DEN
DEN - Denver Intl Arpt - Denver, CO
Select nearby airports

Departure
12/21/2012 | depart ▼ | 9:00am ▼ | ± 2 ▼

Return
12/31/2012 | depart ▼ | 3:00pm ▼ | ± 2 ▼

☑ Pick-up/Drop-off car at airport
☑ Automatically reserve this car
National ▼ | Intermediate Car ▼

☑ Find a Hotel
Find hotels within 5 | miles ▼ of
○ Airport   ○ Address
○ Company Location ● Reference Point / Zip Code
e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA'
Denver, CO

☐ With names containing:

☐ Specify airline
Search flights by: ● Price   ○ Schedule
Flights w/ no double connections: ☑

Search

Concur returns the flights that best comply with Purdue travel policy. Select a flight and click **show details**.

The detail drop-down shows each leg of the trip and carriers. If the flight is acceptable, click the **Reserve** button.

For information regarding Fly America Act restrictions, visit the Purdue Travel site at:
http://www.purdue.edu/business/travel/Transportation/Air_Travel/airfaretravel.html#usflag.

Flights results are color-coded.
- Green indicates that the rate meets University policy.
- Yellow indicates that the rate is not the best available within University policy.
- Grey indicates that the rate does not meet University policy.

If booking a yellow rate, select appropriate code from the drop-down menu and provide sufficient explanation.

Note: The following air carriers are immediate purchase:

- JetBlue
- Southwest
- AirTran
- Frontier

If search results do not yield adequate flights, edit search options using the right side toolbar.

Change Flight Search

Outbound - Fri, May 10

Depart
6:00 AM - 2:20 PM

Arrive
7:35 AM - 8:47 PM

Return - Tue, May 14

Depart
9:10 AM - 8:40 PM

Arrive
1:00 PM - 11:55 PM

Price

Price
$274.30 - $830.00

Display Settings

☐ Hide Non-refundable Fares
☐ Hide Propeller Planes
☐ Depart/Return Same Airport Only

Airport Filters

Outbound
Departure
☑ IND - Indianapolis, IN ($274.30)
Arrival
☑ HOU - Houston, TX ($274.30)

Return
Departure
☑ HOU - Houston, TX ($274.30)
Arrival
☑ IND - Indianapolis, IN ($274.30)

Connecting Airport Filters

Read the message from Concur. Click **OK**. **Wait while Concur books your reservations.**	**Message from webpage** Customers holding NON-REFUNDABLE type tickets may cancel their journey, and reuse these tickets to any destination in the carriers system, within one year following the DATE OF ISSUE. Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only. WARNING:IF YOU ARE CLICKING RESERVE FOR SOUTHWEST AIRLINES THE RESERVATIONS WILL ERROR - YOU MUST RESERVE BY CLICKING ON THE SWABIZ ICON. IF YOU ARE NOT RESERVING SOUTHWEST, PLEASE CONTINUE. [OK] [Cancel]
Review the Hotel Per Diem Location. Remember the rates so you can add your fixed meals cost to your Travel Request. Click **Next>>**	**Hotel Per Diem Locations** **Search for Locations near:** Country(Select a Country to get a list of locations or States) United States of America (US) State Colorado (CO) Location Denver County --- Denver County | Lodging Rate	Meals Rate	Incidentals Rate
---	---	---
$ 149	$ 61	$ 5	 Please choose the per diem location for your hotel [Display Trip] [<< Previous] [Next >>] [Cancel]
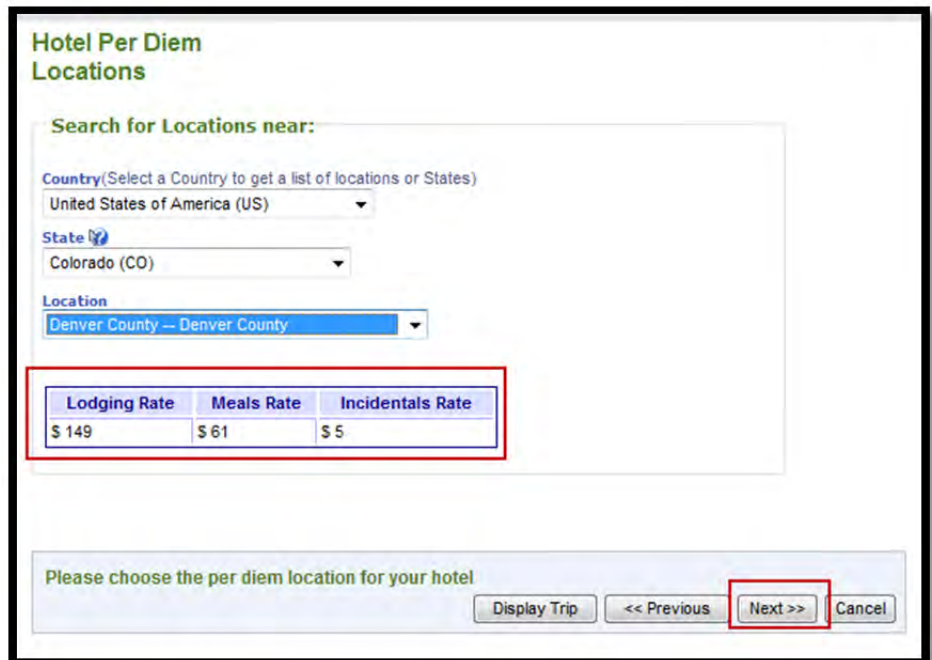
Review the list of hotels that fit the criteria entered in your profile and in your request.

Locate your hotel in relationship to your business on the map provided.

Click **choose room**.

Review room details.

Select the radio button that corresponds to the room type you want during your stay.

Note: If you entered a hotel loyalty program in your profile, select it from the **Hotel Program** drop-down menu.

Click **Reserve**.

Note: Rooms and rates are color-coded.

- Green indicates that the rate meets University policy.
- Yellow indicates that the rate is not the best available within University policy.
- Grey indicates that the rate does not meet University policy.

🍴 **Breakfast:** Breakfast Buffet: 19

🌐 **Internet:** Wireless: 9.95, Ethernet RJ-45/Wired: 9.95

cancel 2 days before arrival (Rate Code: REGQ00) (Worldspan)

$389 Rate changes over duration of stay
Regular Rate Concierge Lounge Access 1 Bedroom Larger Suite 1 King Please cancel 2 days before arrival (Rate Code: REGQ00) (Worldspan)

$995 Regular Rate Concierge Suite Concierge Lounge Access 1 Bedroom Suite Please cancel 2 days before arrival (Rate Code: REGS00) (Worldspan)

$995 Regular Rate Concierge Suite Concierge Lounge Access 1 Bedroom Suite Please cancel 2 days before arrival (Rate Code: REGS00) (Worldspan)

$259 Company policy does not allow booking this room.
Rate changes over duration of stay
Advance Purchase Rate Prepay In Full Non-refundable No Changes Guest Room 1 King Or 2 Double Some Ball Park View City View (Rate Code: APNL00) (Worldspan)
Deposit required

⚠ Hotel Rate is greater than the government per diem rate plus 100 %

Rate details / Cancellation policy

Use the following Hotel Program: No Program selected ▼   **Reserve** ⚠

➕ Add a Program

If booking a yellow rate, select appropriate code from the drop-down menu and provide sufficient explanation.

This hotel is not in compliance with the following travel rule(s):

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

☑ Hotel Rate is greater than the government per diem rate plus 100 %
-- Please Choose a Reason -- ▼

Please explain why you have chosen this hotel. NOTE: We will log all hotels which you did not take.

Save   Cancel

-- Please Choose a Reason -- ▼
-- Please Choose a Reason --
Declined Prefered Hotel Due To Location
Declined Preferred Hotel Due To Rate
Declined Preferred Hotel Due To Personal Preferences
Other - Please Explain In Box Below

Review the **Rate details /Cancellation policy**.

Click the checkbox next to "**I agree to the hotel's rules, restrictions, and/or cancellation policy.**"

Click **Continue**.

Rate details / Cancellation policy

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

Hotel Rates
99.00 USD PER NIGHT STARTING 21DEC12
ROOM RATE DETAIL: ALL KNOWN TAXES/FEES/SURCHARGES
146.02 USD MISC PER STAY
1136.03 USD TOTAL AMOUNT OF STAY

1 KING BED EVOLUTION ROOM
ADJUST.SLEEP SYSTEM BED-CRISP WHITE DUVET
HI DEF.TV-COMP HI-SPEED NET-MICROWAVE-REFRIG
CREDIT CARD GUARANTEE
12AM 21DEC12
10.00 USD EXTRA PERSON CHARGE
0.00 USD EXTRA CHILD CHARGE
0.00 USD CRIB CHARGE
15.00 USD ROLLAWAY ADULT CHARGE
15.00 USD ROLLAWAY CHILD CHARGE
PLACE NS IN SI FIELD FOR NONSMOKING

☑ **I agree to the hotel's rate rules, restrictions, and/or cancellation policy.**

[Continue] [Cancel]

Segment Itinerary	
The ability to change, edit or cancel reservations can still be made at this time using the links to the left of the segment detials.	
Other segments can still be added by clicking the segment icon options	
The itinerary for your trip appears in sections or segments. The airfare to your destination appears first. Review this detail, including seat location.	

Review your rental car information.	
Review your hotel arrangements and potential fees.	

Review your return flight information.

Review your seat selection

Review the total estimated cost of your trip.

Note: Remember you still need to add any other expected charges when you complete the **Header** on the **Expenses** tab.

Read the reminder text and click **Next>>**.

Monday Dec 31, 2012

Air

Denver, CO (DEN) to Minneapolis/St. Paul, MN (MSP)

Mon Dec 31	**Delta** 2108	*Duration:* 1 hour, 55 minutes Nonstop
Change This Leg	Denver (DEN): 1:25 PM	Minneapolis/St. Paul (MSP): 4:20 PM
Cancel all air		Terminal: 1
	Confirmation Number: GFRZV3	Status: Confirmed

Flight Information

Aircraft: Airbus A320	Distance: 679 miles
E-Ticket	
Cabin: COACH (L)	Seat: 20A Change Seat
Meal: Refreshments for Purchase	

Connecting at Minneapolis/St. Paul, MN (MSP) to Indianapolis, IN (IND)

Mon Dec 31	**Delta** 970	*Duration:* 1 hour, 44 minutes Nonstop
Cancel all air	Minneapolis/St. Paul (MSP): 5:20 PM	Indianapolis (IND): 8:04 PM
	Terminal: 1	
	Confirmation Number: GFRZV3	Status: Confirmed

Flight Information

Aircraft: Airbus A319	Distance: 502 miles
E-Ticket	
Cabin: COACH (L)	Seat: 14F Change Seat

Add: WI-FI   Taxi   Car   Hotel

Air	**View Fare Rules**
Airfare quoted amount:	$406.24 USD
Taxes and fees:	$73.67 USD
Air Total Price:	$479.91 USD
Hotel:	$990.00 USD
Car:	$551.56 USD
Total Estimated Cost:	$2,021.47 USD

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

Remarks:
U20/CLIQCID-32464

Itinerary created on 09/13/2012 at 9:09 AM

If you close at this point your reservation may be cancelled. Note: any part of the trip that is instant purchase or has deposit required will not be cancelled.

Next >>   Cancel

Enter **Trip Name**.

Note: This is the name as it will appear on your itinerary received by email from Concur.

Click **Next**.

Scroll to bottom of screen and click **Confirm Booking>>**

Complete Request Header

Complete Required Fields	
Highlighted with red line or heavy left bar.	

Request Name	Name trip according to the naming convention that has been designated by your business office. This should be a name that helps you, your delegate and/or your business office find and report cost associated with the trip.
Request Policy	Defaults to Purdue Travel Request Policy.
Traveler Type	Select one: Employee (EMP), NonEmployee (NE), Student, Team Travel (Team).
Travel Type	Select One: In State, International, International - Under Warning, Out of State. **NOTE:** If travelling travel type is International – Under Warning, list all cities and countries that will be visited in the **Comment** box. For a list of countries with travel warnings, visit the Department of State website at: http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html. Rick Management provides insurance for all International travel.
Purpose of Travel	Select best option from drop-down menu. **NOTE:** When option related to research is selected, the purpose of research is required in the **Comment** box.
Is this trip being paid for by Purdue?	Select yes or no.

Preapproval Required

Default selection is **None**.

NOTE: When selecting None and the trip does not include a flight upgrade or cash advance, the request is auto-approved.

Most trips do NOT require pre-trip approval. However, if funding for your trip is from any of the areas listed or is mandated by your department head, select the appropriate item.

If travelling internationally on ARO, EPA or State Sponsored funds, select appropriate drop-down.
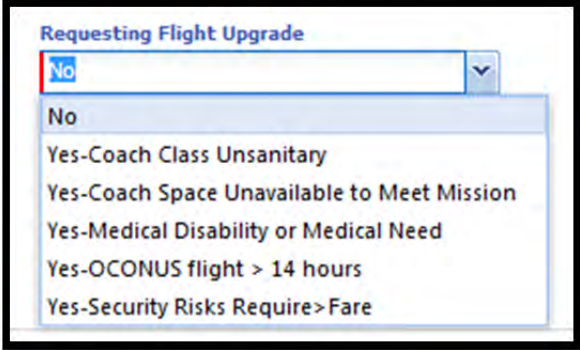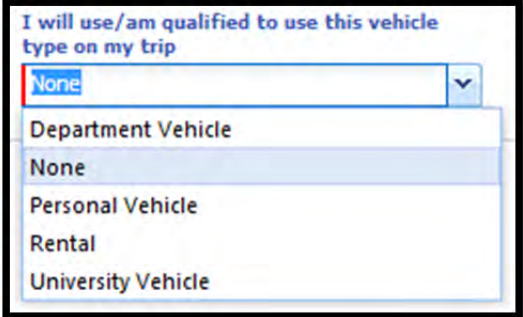
If travelling on DOE Lab or funds that have been defined by the sponsor as requiring pre-trip approval, select appropriate drop-down.

Note: When selecting all other options:

1. The fiscal approver is required to approve the travel event.
2. A report notification is provided to Sponsored Programs outlining travel details. Sponsored Programs will notify fiscal approver within 48 hours, if alterations are required for travel arrangements or travel should be cancelled.

For a list of Sponsor Defined pre-trip approval requirements, see Active Sponsored Programs with Travel Restrictions.

Preapproval Required

None

ARO (International Only)
Departmental Mandate
DOE Lab
EPA (International Only)
None
Sponsor Defined
State Sponsored (International Only)

Booking Travel in Concur® Travel and Expense

For more pre-trip approval details see Approval Workflow.	
Departure Date Populated by booking.	**Departure Date** 12/15/2012
Return Date Populated by booking	**Return Date** 12/16/2012
If personal travel is included, list dates.	List any dates to be used as personal time.
If anyone is traveling with you, provide names/relationship.	List names of other employees, spouse, or other individuals who will be traveling with you.
Requesting Flight Upgrade Defaults to No; if Yes, select reason from drop-down. Selecting a flight upgrade requires the employee's direct supervisors approval. For more pre-trip approval details see Approval Workflow. **Note**: If selecting **Medical Disability** or **Medical Need**, ensure approved exception is on file in the Business Office.	If yes, select reason from drop-down. **Requesting Flight Upgrade** No No Yes-Coach Class Unsanitary Yes-Coach Space Unavailable to Meet Mission Yes-Medical Disability or Medical Need Yes-OCONUS flight > 14 hours Yes-Security Risks Require>Fare
I will use/am qualified to use this vehicle type on my trip. Select one from drop-down list.	**I will use/am qualified to use this vehicle type on my trip** None Department Vehicle None Personal Vehicle Rental University Vehicle

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 (Football).

NOTE: When travel is paid by more than one source of funds, Use the primary (most restrictive) account assignment. If all accounts are equally restrictive, list the account that is paying for majority of cost. Multiple funding sources are idenitifed using allocations when entering estimated expenses.

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

If you don't know the correct account assignment, click **Save** and refer to your business office or the job aid they provided.
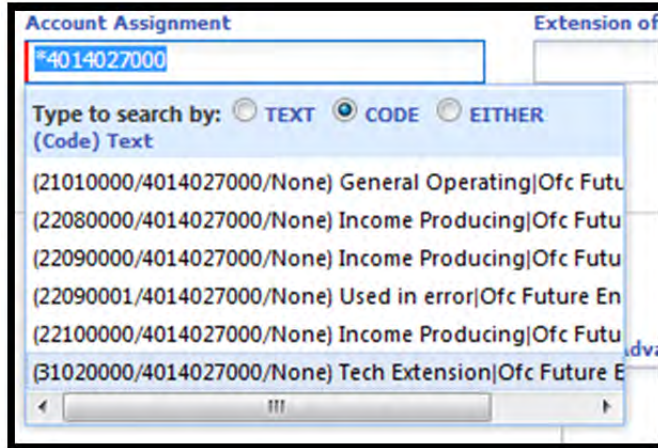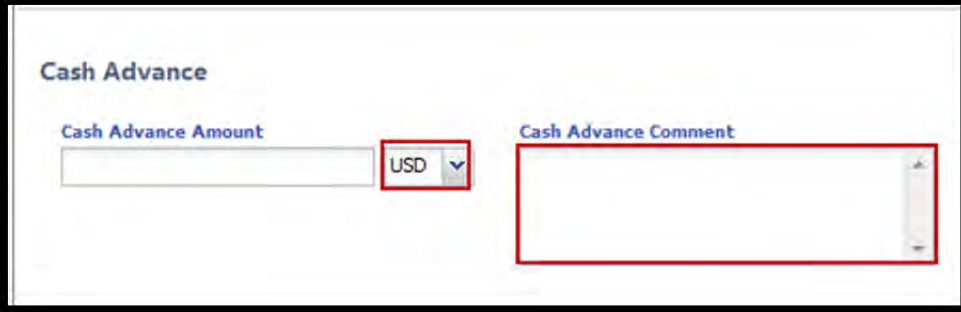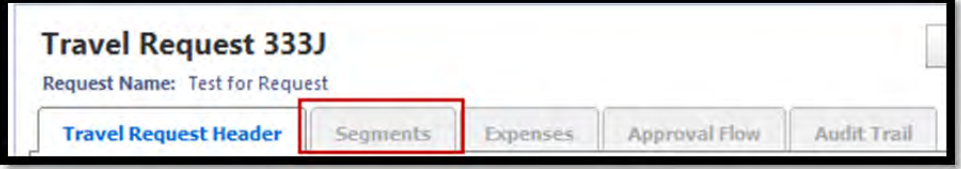
Tips:

Use as many digits of the account assignment as possible.

Use scroll bar at bottom of window to see account assignment name.

Extension of	Select other Travel Request name if this request is in addition to another.
Comment	Enter any comments relevant to this request.
Cash Advance If you are requesting a cash advance greater than the $500 available through Visa Travel Card, type the amount of the cash advance in the **Cash Advance Amount** text box. Make sure **USD** is in the currency drop-down. Provide an explanation in the **Cash Advance Comment** box regarding the use of the funds. See QRC Request Cash Adavnce for Travel in Concur Travel and Expense. **NOTE**: Cash Advance requires fiscal approval of the cost center indicated in the Account Assignment. For more pre-trip approval details see Approval Workflow.	**Cash Advance** Cash Advance Amount [ ] USD ▾ Cash Advance Comment [ ]

Complete Segments

Segments include any arrangements such as hotel, car rental and airfare reservations made outside Concur.

Select the Segments tab.	**Travel Request 333J** Request Name: Test for Request Travel Request Header | Segments | Expenses | Approval Flow | Audit Trail

Select segment to add:
 	
  A. Air Travel
  B. Car Rental
  C. Lodging
  D. Taxi Fare
  E. Care Service Reservation
  F. Railway Ticket
	Travel Request 333J
	Request Name: Test for Request
	
	Travel Request Header · Segments · Expenses · Approval Flow · Audit Trail
	
	Add Segment
	Click icon to create segment
	A B C D E F
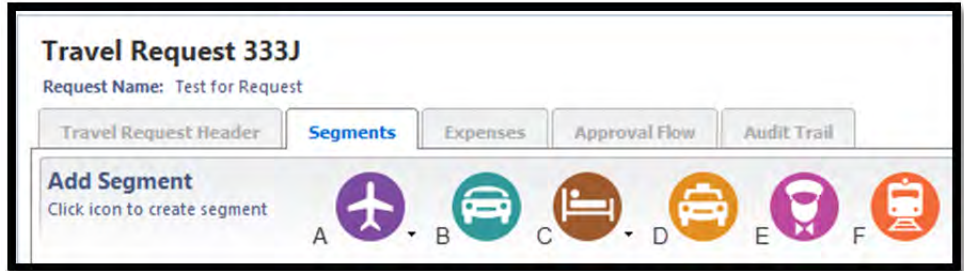
Complete all required information, noted with a red bar.	**Hotel Reservation** Amount: [ ] USD Check-In City: [ ] Date: [ ] At: [ ] Detail: [ ] Check-Out Date: [ ] At: [ ] Comment: [ ]
Click **Save**.	**Save**
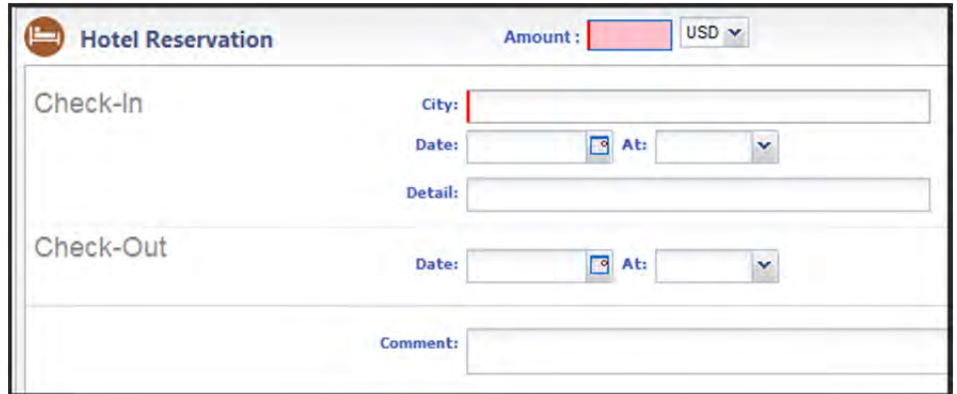
Complete Estimated Expenses
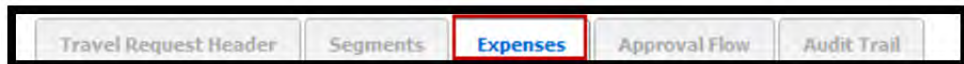
Select the Expenses tab to add estimated expenses; this provides a total estimated cost of trip. Expenses may include: • Mileage • Fixed Meals • Registration Fees • Taxi • Shuttle	Travel Request Header · Segments · **Expenses** · Approval Flow · Audit Trail

Select the correct **Expense Type** from the drop down list. Complete all required fields. Click **Save**	**Expense Type** Registrations Expense **Transaction Date** **Description** **Transaction Amount** 0.00 USD **Comment**
Enter additional **Estimated Expenses**. **Note:** All anticipated expense must be entered prior to submitting your travel request.	Airfare ...Ground Transportation ...Lodging Airfare Expense Chartered Bus Other Lodging Chartered Airfare Parking Misc Trip Expenses PU Airplane Shuttle Miscellaneous Ground Transportation Subway Other Transportation Bus Taxi Ferry Car Rental Train Tolls Car Service Lodging Registrations Hotel Registrations Expense Subsistence Fixed Meals

Allocations
In order for all funding source Cheifs, PI or Co-PI and Fiscal Approvers to receive appropriate notifications, all additional funding sources must be identified by allocating expenses. Not providing allocations will result in lack of notification to other funding sources.

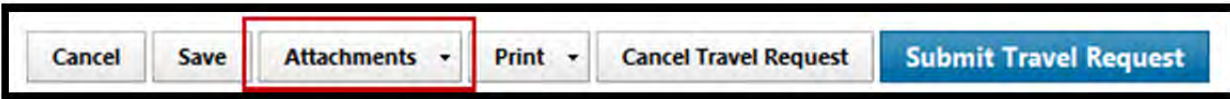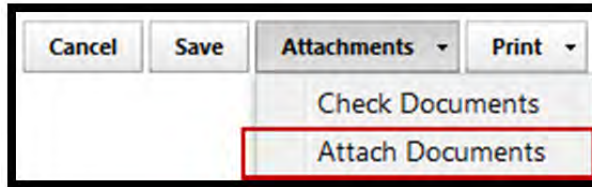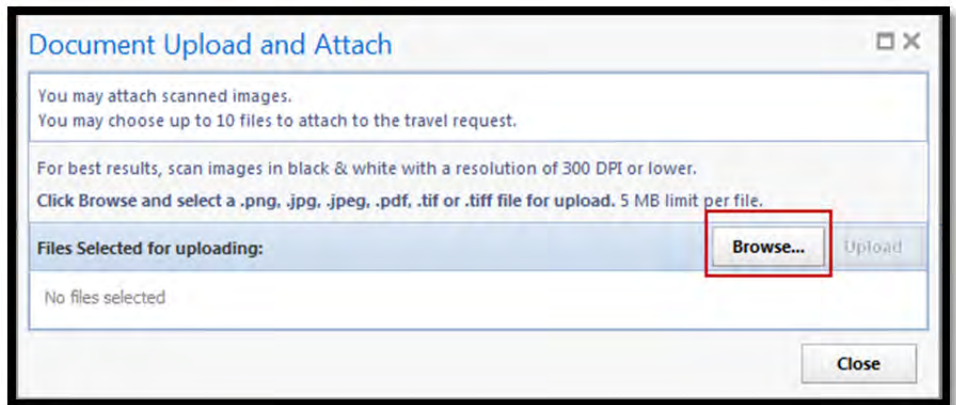|	
Click **Allocate** to apply allocations necessary to any estimated expenses.	
Allocate by **Percentage** or **Dollar Amount** and enter appropriate account assignments for each allocation. Click **Save**.	

Attach Additional Documentation
If you have documentation that needs to be included attach it to the travel request.

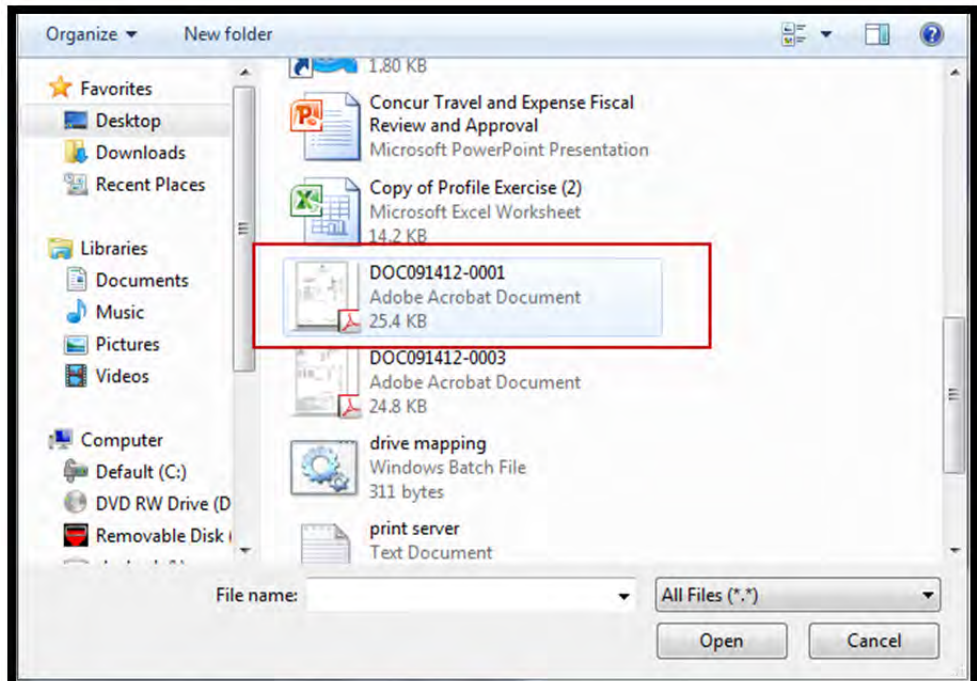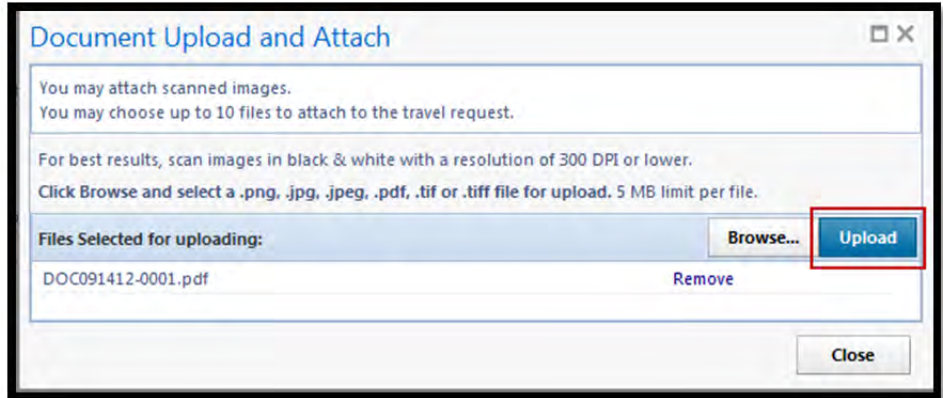| Select **Attach Documents** from the Attachments drop down box.	
Click **Browse…**	
Select your document from the **Choose File to Upload** window Click **Open**	

|	
Click **Upload** Click **Close** **NOTE:** Any documentation that is required at reimbursement must be attached to the Expense Report. Those may include Drive vs. Fly, Cost Comparison.	

Submit Travel

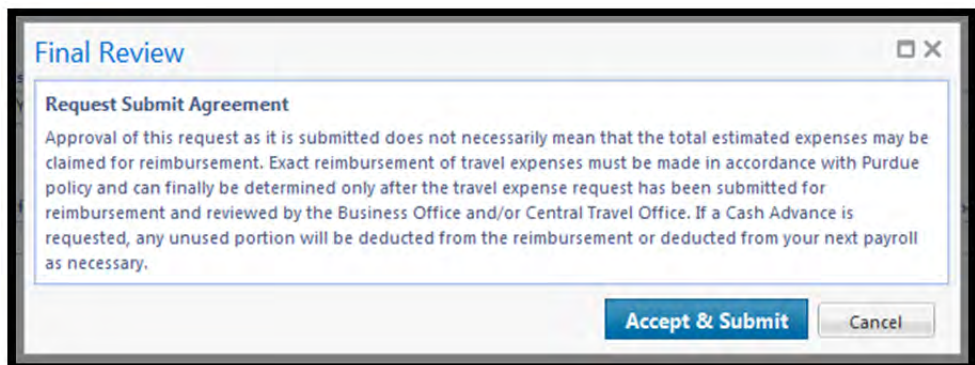|	
If you are arranging travel for yourself, click **Submit Travel Request**.	
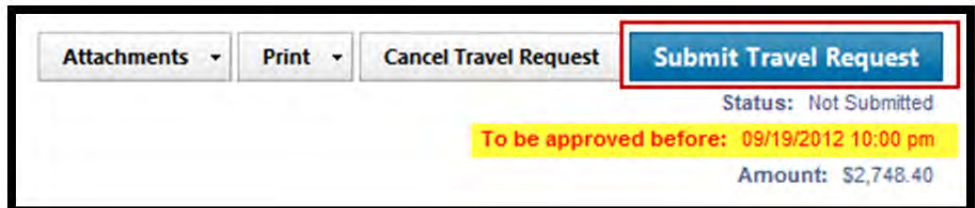
If you are arranging travel on behalf of someone else, click **Notify Employee**. **Note**: The traveler must submit his/her own **Travel Request**.	
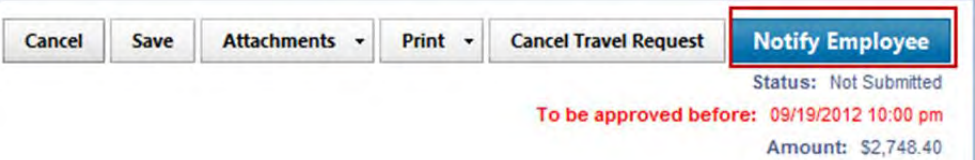
Review the **Request Submit Agreement**. Click **Accept & Submit**.	

Trips are automatically booked and tickets purchased unless they are actively rejected by the Fiscal Approver in the Concur System.

Report Review

Sponsored Programs will review funding source report within two business days of receipt.

To deny travel on specified funds, notification is given to the fiscal approver of the funding source listed in the header **Account Assignment**.

SPS approval is required for foreign travel on all SPS funds except NSF and NIH. SPS also reviews and approves funding if one of the following applies to travel request:

- ARO (International Only)
- DOE Lab
- EPA (International Only)
- Sponsor Defined
- State Sponsor (International Only)

SPS approval of foreign travel on NIH and NSF funds has been delegated to the fiscal approver.

Risk Management will view reports for all international travel and process appropriate insurance forms.

Traveler will receive Insurance Identification Card, if travelling outside the 50 region United States.

Card is delivered by email or campus mail prior to travel.

If card is not received within one day prior to departure, contact Risk Management Department.

Travel Notifications

A Concur generated email request for approval is immediately sent when pre-trip approval is required. Once approved, a notification report is generated outlining trip details and forwarded to:

- Traveler's supervisor
- Chief of all funding sources
- Co-PI of all funding sources
- Fiscal Approver of all funding sources
- Traveler/Travel Assistant/Delegate