Travel Reporting in Concur
Is it all just a guessing game?
Travel Facts

- Travel must be approved prior to any purchases of airfare, conference registrations, etc.
- Expenses must be "reasonable".
- The best way to avoid "unreasonable" expenses is to ask first.
- Your faculty advisor may not know the policies.
- Your CHBE staff will know the policy or will find out.
- All travel must be submitted through Concur.
Rice Travel Policy

University Policy #806

Travel, Business Meeting and Entertainment Procedures available at the Controller’s Office and are designed to assist in completing an expense report that complies to the above policy.
Rice University
Chemical and Biomolecular Engineering Department

TRAVEL AUTHORIZATION REQUEST
Use this form to obtain prior approval and notify the department of intended travel.

TRAVEL INFORMATION:
Name: Sammy Owl
Student ID#: S0112389
Title of Event/Conference/Meeting: AICHE Meeting

Description/Business Purpose (How will this benefit your research at Rice)?
Annual Meeting of AICHE members to discuss research and networking opportunities.

TRAVEL ITINERARY:
Leaving Date: Nov. 7, 2015  Return Date: Nov. 10, 2015
Destination: Salt Lake City, Utah

ANTICIPATED COSTS:

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<tr>
<th>Out of Pocket</th>
<th>PCard</th>
<th>Comments/Description of Cost</th>
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<tbody>
<tr>
<td>Registration Fee:</td>
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<tr>
<td>Airfare:</td>
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<td>Lodging:</td>
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<tr>
<td>Transportation:</td>
<td></td>
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<td>Meals: $75</td>
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<td>Misc:</td>
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TOTAL COST: $1476

Notes:
- Rates for meals and tips should not exceed allowed amounts per Rice and Department Policy
- Traveling in Texas requires traveler to request Hotel Occupancy State Tax Exemption and state sales tax on meals purchased while conducting business for Rice.

FUNDING INFORMATION:
- Fund # 076271
- Org. 715000

Signature of Traveler: Sammy Owl Date: 10/1/15
Approval Signature (Advisor): Date: 10/1/15

Submit to department for approval with funding information and signatures: DEPT. APPROVAL
Setting up your profile

Access Concur at concur.solutions.com

Log-in with Net ID and password

Check and update your profile information
Profile Options

Select one of the following to customize your user profile.

**Personal Information**
Your home address and emergency contact information.

**Company Information**
Your company name and business address or your remote location address.

**Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.

**Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.

**Change Password**
Change your password.

**System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**
How can we contact you about your travel arrangements?

**Setup Travel Assistants**
You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.

**Bank Information**
Bank Information

**Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Mobile Registration**
Set up access to Concur on your mobile device.
Optionally, add seat preferences, preferred airport, special needs, and even frequent flyer numbers.
## Expense Delegates

### Delegates

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<tr>
<th>Name</th>
<th>Can Prepare</th>
<th>Can Submit Reports</th>
<th>Can View Receipts</th>
<th>Receives Emails</th>
<th>Can Approve</th>
<th>Can Approve Temporary</th>
<th>Can Preview For Approval</th>
<th>Receives Approval Emails</th>
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<td>Hines, Leewanda</td>
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<td>Barbara <a href="mailto:L.Windish@rice.edu">L.Windish@rice.edu</a></td>
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Expense Approvers

Default approver for your expense reports.

Search by employee name, email address, employee id or login id

Hughes, Jon
jon.r.hughes@rice.edu
Logon ID: jrh16@rice.edu
*Org Unit 1-Org Unit: Chemical & Biomolecular Engineering
Reasonable Expenses:

- Conference/Registration Fees
- Abstract Submission Fees
- Airfare Expense
- Lodging (includes deposits)
- Ground Transportation (Shuttle Service/Taxi/Car Rental)
- Airport Parking & mileage
- Meals
- Misc. including poster printing
Pre-travel expenses that may be charged to P-card include:

Conference/Registration Fees
Abstract Submission Fees
Airfare Expense
Lodging (includes deposits)
Ground Transportation (Shuttle Service/Taxi/Car Rental)
Airport Parking & mileage
Meals
Misc. including poster printing
Managing pre-travel expenses

Option 1:
Print a copy of your travel authorization form
Attach receipts for all charges made on a p-card, and a
copy of the conference agenda.
Give to p-card account holder

Option 2:
Create a pdf and send it all via email.
All About Airfare

• Airfare may be purchase through Concur, or directly through a travel website.
• Purchase may be made on a p-card or personal card.
• Do **not** purchase travelers insurance. The University’s business travel accident insurance policy covers employees and students when traveling on behalf of the university.
• Rice policy requires travelers to fly coach. No upgrades may be charged to Rice but are allowable at your own expense. Some exceptions are made for medical or extended flights.
• For personal travel associated with your business travel there are special requirements. You **MUST** discuss these plans with administration **BEFORE** purchasing your airline ticket.
• If traveling internationally you must use U.S. carriers when travel is funded by federal funds. Again, be certain to discuss with administration **BEFORE** purchasing your airline ticket.
• Ground Transportation (Shuttle Service/Taxi/Car Rental)

Airport Parking & mileage

Lodging

Meals

Other
Completing a travel expense report:

Report naming:
Last name_month_year_travel

Enter fund as shown on approved travel authorization

Select Travel, BME from drop-down
Lodging

Room-sharing is encouraged by most advisors when feasible. If one person pays for a shared room, it MUST be noted in comments (include name).

For Texas hotel accommodations you must request exemption for Texas Hotel State Occupancy Tax. TAX EXEMPTION ONLY IN TEXAS and does not include the local taxes. Receipts for hotel accommodations must be itemized in the Concur report. Itemizations include the daily room rate and taxes paid.
Meals

Meals for one-day travel may not be claimed per Rice policy.

When dining in Texas for Rice/Department business you must provide the vendor/restaurant with the tax exemption form. Some local establishments may be aware of the Rice policy and not need the form.

Meal rates are always decided by the advisor and indicated on the Travel Auth. (however, this rate can not exceed the government per diem)

First and last day of travel will usually be adjusted per the travel times.

Alcoholic beverages are NOT an allowable expenditure. Receipts MUST be itemized when not claiming per diem.
In Houston – use Super Shuttle or drive/park.

Your online reservation for shuttle transportation is an acceptable receipt.

Concur will calculate your mileage reimbursement once you enter start/end points.

Allow plenty of time if parking at the airport to use inexpensive remote parking lots.

At destination – use shuttles when possible, if using taxi or Uber be certain to ask for a receipt.
Car Rentals

The university’s auto insurance policy covers employees and students traveling on behalf of the university. Exceptions would include foreign travel outside the U.S. and Canada; damage and liability insurance should be purchased. You must decline auto insurance offered by a car rental company unless you choose to pay for it yourself.

GPS is not a covered expense.

Fuel charges should be avoided by refilling the gas tank at a nearby facility prior to returning the vehicle.
Mileage reimbursement

Allowable to/from home airport. Enter start and end points in your Concur report and it will calculate.

Allowable for some trips depending on distance and in other special circumstances. Note that use of a personal vehicle for business travel is discouraged.

May be limited to the amount of airfare to the same destination. Discuss with administration prior to using this option.
Attach to your final report all receipts for purchases over $25.

**Best Practices Policy for the department requires all receipts be included in the Concur Expense Reports.**

For travel expenses you must always submit receipts for lodging, airfare and car rental, no matter what the total amount paid. The $25 exclusion does not apply.