BUCH Guidelines for Using Concur with BUCH codes.

Business and Travel Expenses: you will have to use the Concur system.
There are several things you should note when using the Concur system for all BUCH Award expenses.

To access Concur:
You must log on to the BU Works Central website using the DUO system and go to the Employee Self Service tab. Then click on "Travel Reimbursements", then look at "Concur Travel and Expense Reporting," and click on the line below that which says, "Manage Business Travel Arrangements and Reimbursements." You will now have to log in again with your BU User name and Password.
NOTE: if you are a faculty member and wish to have your administrator do your expense reports (and your administrator is willing), now is the time to go to the profile link in the top right corner and click "Profile Settings." Then select "Expense Delegates" and add the email address of the person you wish to delegate to do your reports and the duties you are delegating to them.

To create an Expense Report:

1. Make a New Report – Go to the top box with the "+ New" label and select "make a new report."

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2. **Report Name –** The first box you are asked to fill is "Report Name." This box will hold 33 characters. It is very important to put useful information there.
   a. Please write**: the last name of the person receiving the money, and abbreviation of the event, the activity of the receipt, and the date**.
   b. For example: "Loken-Kim.LinC.parking3.2.15" stands for "Loken-Kim, requesting a refund from the Lectures in Criticism Award, for parking on March 2, 2015."
3. Trip Purpose – This is a drop down box. Please select "Travel" for your guest's expenses and "Meetings" for expenses such as meals, materials, taxis, etc. related to the local event. If you are requesting a refund for supplies or publication production costs, please select "Business Expense."
4. **Cost Object –**
   a. Use (009250010109 – Visiting Faculty Endowment Fund) for Project Award expenses. Notice that it does not say Humanities Foundation- but it is our.
   b. Use (009250010106 – Humanities Foundation) for Departmental BUCH Block Grants, Publication Production Awards, and Fellows Research Accounts expenses.
   c. If you are not sure which to use, please call the BUCH administrator at 8-6251.
5. "Does this report charge a grant/sponsored program?" – the answer is NO for all BUCH awards.
6. "Traveler Type" – is a drop-down box – please select the type: faculty, staff, guest, of the person receiving the refund.
7. **Comments box – Please write the Awardee's name in that box and the Project Award title**

8. Clicking “Next” will take you to page 2 where you enter your expenses.

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9. Itemize your expenses – Start with the big box on the right to enter your first expense. Look below at the 6 categories of “Expense Types” and click on the one that fits your expense. That will cause the text box to populate.
    a. Please note: for BUCH purposes, Categories) 01, 02, and 03 should be used for Travel Expenses. All of the text line items in these sections will populate into the budget as GL513500 (Travel).
    b. The line for taxi in section 3 should be used only for the guest lecturers taxi to and from his/her home terminal and the Boston terminal and hotel. Not for rides to after event dinners.
    c. Please do not use Meals or Business Meals in section 03 for your dinners after lectures. Dinners, lunches, and reception food should be claimed as “Meeting Expenses” NOT “Meals” or “Business Meals.” “Meals” should only be used for the traveler’s food during the trip outside of event dining.
    d. Section 04 should be used for Office and Printing expenses.
    e. In section 06, you will find the line item “Meetings.” Please use this for all of your conference expenses, dinners after events, paper goods, and taxis related to conference events. This will populate as GL513910 our usual number for meeting expenses. In section 06 there are also categories for books, conference registration, and materials.
10. **“Business Purpose”- THIS BOX IS VERY IMPORTANT. The text you enter here is the only thing that will populate to the text box in the SAP report. Please write the same text which you used on PAGE ONE for the report NAME. Do not write: meal, books, conf, etc. in this box.**
11. Continue filling out the boxes.
12. **Meeting Expenses such as Eating out with presenter**
    a. Note that the last text box says “Does this Meal include alcohol?” If your meal included alcohol, you must select “Yes.”
    b. Now go to the lower right corner and click on “Itemize.” Wait. A new right window will appear with an Expense type box. Select “Meeting Alcohol/unallowable.” Wait. Your original screen will return with all the text boxes filled except the “Amount” box. Type in the amount of alcohol on the receipt. Let’s say it was $75. Hit “Save”
    c. You are not finished! The blank right screen will return. At the top it says, “Add itemization.” There is an Expense Type box near the top. Click on this to open it and select “Meeting” – now enter the balance of your total expense in the amount box. (Ex. You spent $75 on alcohol at a $300 dinner. The balance is $225.)
    d. Now click on the save button. You do not have to itemize tax or gratuity for your meals at this time, only the alcohol.
    e. Now go back and click on the original entry for your item ($300). Prepare your receipts by taping the receipt to the flier of your event (if there is one) and scanning it. Up-load your receipts using the receipts tab in the **lower right corner.** Be sure you include a list of the people attending the dinner. If you use

the receipts button at the upper left, it will be rejected. Please attach a flier for your event to your report if there is one.

13. Hotel- you must itemize these also. Follow the procedures above.
14. Save your report- if you have made your department administrator an Expense Delegate on your profile, now is the time to contact them and ask them to look over your report and correct any errors. This could avoid having your report rejected.
15. **Submit – After you have up-loaded your receipts, and checked that you have filled out the BUSINESS PURPOSE with the same text as your report name for each receipt, you can hit "Submit Report."**
16. Save a PDF – If you want to save a PDF copy of the report for your records, go to the "Expense" tab at the top, click on "Manage Expenses." Click on/ highlight the report you wish to make a PDF of, find the "Print/Email" link above the report name, and click on "BU Detailed Report."
17. For you own personal reference, the REPORT KEY number is the one you want to write down, not the REPORT ID.

I regret that this is so long, however, if you follow these instructions, you should be able to create your report with few headaches.
Thank you for your cooperation.
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