

THE TRAVEL CARD AND THE CONCUR SYSTEM

2022



AGENDA

- Travel Card use
- Concur expense report submission
- Travel Services resources

WHAT IS A TRAVEL CARD

- Corporate liability Visa card
- Direct billed to BU
- Paid for by BU
- To be used for travel related expenses

WHY I LOVE THE TRAVEL CARD

- Ease of booking
- Online payments
- Ease of transaction
- No cash up front
- Ease of expense tracking

AGENCY - DIRECT TRAVEL

- Direct Travel is Boston University's travel booking agency partner
 - 617-353-1700
 - Travelbooking@bu.edu

WHY I DON'T LOVE THE TRAVEL CARD

- Purchasing restrictions
- Receipts – itemized receipts, missing receipts
- Concur report submission
- Picking a GL code
- Being asked to use my Travel Card to purchase for someone else or for another department

WHAT TO BUY WITH THE TRAVEL CARD

YES

- Airfare
- Hotel
- Meals while traveling
- Transportation
- Conference registration
- Business Meals

NO

- Supplies, materials
- Subscriptions
- Books, periodicals
- Services

BE CAREFUL

- Gifts (516060) >\$100
- Flowers (516080)
- Event tickets (516050)
- Alcohol (513920)
- Business meals with others (513910)

PURCHASING ALTERNATIVES TO TRAVEL CARD

- PCard
- ARIBA Purchase Order
- ISR (Internal Service Request)
- Disbursement request

MET INTERNAL TRAVEL POLICIES

- Travel Pre-Approval Form required
- Air travel reimbursed at standard economy rate
- Travel Insurance & Car Rental insurance are not reimbursable
- Hotel rate not to exceed the per diem lodging rate for your travel city
 - Domestic: <https://www.gsa.gov/travel/plan-book/per-diem-rates>
 - Foreign: https://aoprals.state.gov/web920/per_diem.asp
- MET Staff Travel Information available here: <https://www.bu.edu/met/faculty-staff/forms/staff-travel-approval-form/>

WHAT TO DO IF THE TRAVEL CARD IS DECLINED

- Call US Bank at the toll-free number on the back of the card
- Determine reason for decline:
 - Expired card
 - Purchasing limit
 - Outstanding transactions or Unsubmitted reports
 - Merchant Category Code
- Email tcard@bu.edu

QUESTIONS??

CONCUR

- Concur is the SAP Travel & Expense reimbursement platform
- Submit an expense report within 30 days of the conclusion of your travel
- Upload receipts for every transaction
- How to submit a Concur expense report instructions are here
https://www.bu.edu/travelservices/files/2014/10/QRG_TM_How-to-Start-an-Expense-Report.pdf

**BOSTON**
UNIVERSITYStart a
ReportUpload
Receipts

00

Required
Approvals

00

View Trips


00

Available
Expenses

00

Open
Reports

TRIP SEARCH

 Booking for myself | [Book for a guest](#)CONTACT THE DESIGNATED GOVERNMENT AGENCY IN
YOUR COUNTRY OF CITIZENSHIP FOR PASSPORT/VISA
REQUIREMENTS.TRAVEL INTO U.S. MAY REQUIRE ESTA
AUTHORIZATION.
FOR DETAILS VISIT THE
[THE ESTA WEBSITE](#)**To check the latest domestic and international Covid
travel information please click [here](#)**

Mixed Flight/Train Search

Round Trip

One Way

Multi City

From 


Departure city, airport or train station

[Find an airport](#) | [Select multiple airports](#)To 

Arrival city, airport or train station

[Find an airport](#) | [Select multiple airports](#)**Search**[Show More](#)

ALERTS

 **Triplt** creates a schedule with all your travel details in one place, accessible on Android or iPhone.
Simply connect your Concur account to **Triplt**. [Connect to Triplt](#) Not right now You haven't signed up to receive e-receipts.  [Sign up here](#)

COMPANY NOTES

Welcome to Concur, Managed by Direct TravelFor information regarding updated policies that suppliers have implemented around cleanliness
and safety - please follow this [link](#)[Read more](#)

MY TASKS

00

Required Approvals →

Great! You currently have no approvals.



00

Available Expenses→

You currently have no available
expenses.

00

Open Reports →

You currently have no open reports.



CONCUR EXPENSE REPORT BUSINESS PROCESS

- Create one Concur expense report for each trip
- Add transactions to the expense report when available in Concur
- Upload receipts
- Assign expense codes and cost center
- Submit report in Concur
- Report is reviewed and approved by department approver/supervisor
- Report is reviewed and approved by MET Finance
- Report is reviewed and approved by the University's Travel Services

EXCEPTIONS

- Out-of-pocket expenses
- Missing Receipt Affidavit
- Non-USD\$ transactions
- Refunds
- Personal expenses
- Fraudulent charges

WHY SCOTT AND HELEN WILL CALL YOU ABOUT YOUR TRAVEL CARD TRANSACTIONS

- Receipt is not sufficient or does not match the transaction
- Itemization
- GL code selection
- Description of transaction
- List of attendees for business meeting
- Unassigned transactions
- Past due expense reports

TIMING IS EVERYTHING

- Travel date is not the same as transaction date
- Often there is a big gap in time between transaction date and travel date
- "Travel End Date" on Concur report is the date you complete your travel
- Create a Concur expense report in advance of travel
- Add expenses to report when they appear as "Available Expenses"
- Submit Concur report within 30 days of the Travel End Date

QUESTIONS ??



MET TRAVEL RESOURCES

- MET Training videos are available in Sharepoint at

<https://bushare.sharepoint.com/sites/MET-Central/SitePages/MET-Finance-Training-Videos.aspx>

- Travel Pre-Approval Forms are located here <https://www.bu.edu/met/faculty-staff/forms/>
- Helen Flagg (617) 358-4741 hflagg@bu.edu
- Scott Perkins (617) 358-1496 zperkins@bu.edu

TRAVEL SERVICES RESOURCES

- Additional resources are available on the Travel Services site at <https://www.bu.edu/travelservices/>
- The University's travel policies can be found at <https://www.bu.edu/travelservices/resources/policies/>
- The Financial Affairs Customer Service Portal can be accessed at <https://bu.service-now.com/fa>
- Contact Travel Services at tcard@bu.edu

QUESTIONS??

