

Travel

Introduction

The Travel section of the Best Practices Handbook is intended to explain the general policies and procedures developed to accomplish the travel needs of all schools and departments within the Boston University community. This section applies to all individual travel expenses on behalf of Boston University School of Public Health.

Four key elements to understanding travel

1. Concur
 - 1a. Booking travel
 - 1b. Submitting an expense report
 - 1c. Add card charges to expense report
 - 1d. Add an out-of-pocket expense
 - 1e. Approval flow
 - 1f. How to approve expense reports
 - 1g. Understanding delegates
 - 1h. Adding delegates
2. Preferred vendors
3. Travel restrictions
4. Reimbursement
5. Unassigned charges
6. Reconciliation
7. International travel



Helpful Links

- [Travel Training Website](#)
- [BU Preferred Travel Vendors](#)
- [Travel Policy](#)
- [Concur Expense Guide](#)

Travel

1. Concur

Concur is a digital solution that BU purchased and uses as their travel and expense management system. It allows for easy online bookings for travel, increased visibility into expenses, and quick reimbursement turnarounds for out of pocket expenditures.

Accessing Concur



To access **Concur** go to [BUworks Central Portal Web-Site Page](#) and follow the menu path below:

Menu Path: [BUworks Central Portal](#) → ESS → Travel Reimbursements → Manage Business Travel Arrangements and Reimbursements →

Helpful Links

[Concur- FAQs](#)

Travel

1a. Booking travel

Within the Concur homepage, you will have special features activated for your profile. Locate the Trip Search area. Select "Booking for Myself" or "Book for a Guest" then choose the icon that relates to the type of travel you will need.

Flight

1. Select your preferred flights by schedule or price
2. Review and reserve the flight segments before completing the reservation or adding car and hotel to the travel itinerary
3. Remember to select your seats
4. Please note selection colors - Green means the fare is within policy; yellow means the fare is outside of the policy – selecting this will ask you to provide a reason; red means the fare is outside of the policy and you will not be allowed to confirm this segment



Car - Hotel - Train

1. Choose the appropriate icon, enter your parameters, and select search



Helpful Links

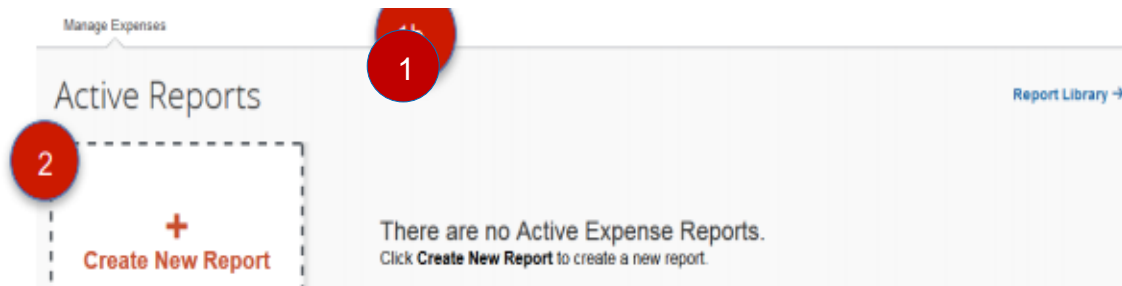
[Travel Quick Start Guide](#)

TIP: Be sure to complete your travel with the purchase button on the trip confirmation tab.

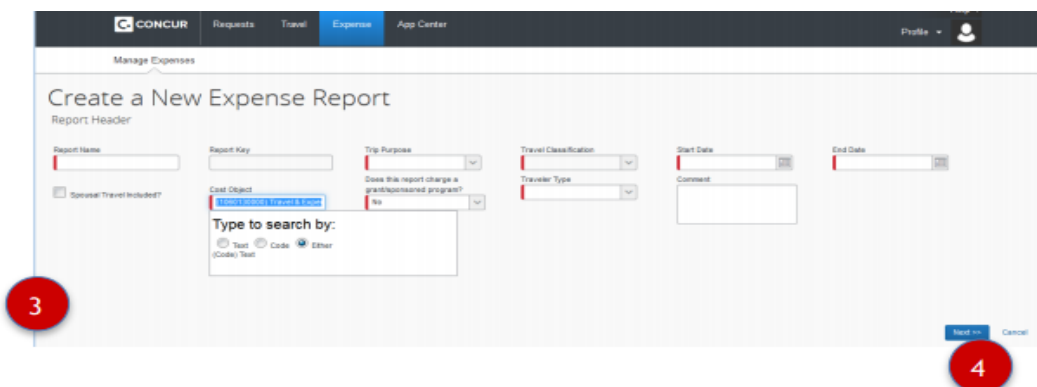
Travel

1b. Submitting an expense report

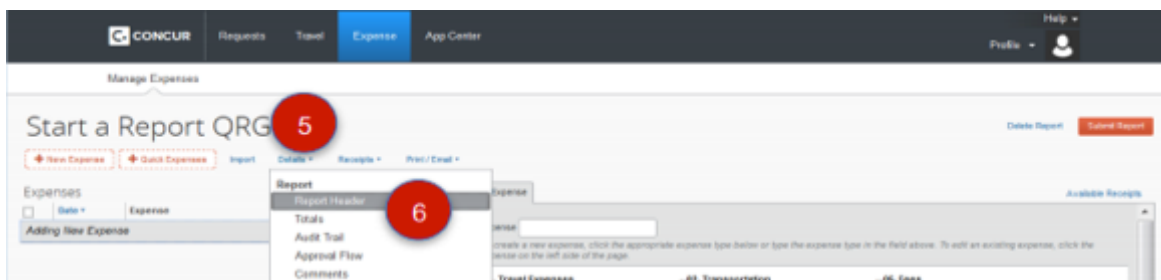
1. Click on the expense tab
2. Click +Create New Report



3. Fill out all Report Header fields (especially the required ones indicated with red line)
4. Click Next



5. If you need to re-access the Report Header after creating your report, click on the details button
6. In the details drop down menu, select Report Header to take you back



Helpful Links

[Start an Expense Report](#)

Travel

1c. Add card charges to expense report

Items purchased on the travel card appear after ten business days in these two locations.

On the Concur homepage in the Available Expenses tab

The screenshot shows the Concur homepage for a user named KARA at Boston University. The navigation bar includes 'CONCUR', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The user's profile is visible in the top right. A summary bar shows: 'New' (+), 'Required Approvals' (00), 'Authorization Requests' (00), 'Available Expenses' (07), and 'Open Reports' (00). Below this, the 'MY TASKS' section has three cards: 'Required Approvals' (00), 'Available Expenses' (07), and 'Open Reports' (00). The 'Available Expenses' card is highlighted with a red border and shows a list of transactions: 06/17 UBER TECHNOLOGIES INC (\$9.62), 06/11 UBER (\$11.24), 06/11 UBER (\$10.83), 06/01 UBER TECHNOLOGIES INC (\$6.39), and 05/28 UBER (\$10.95). The left sidebar contains 'TRIP SEARCH' and 'Air/Rail Search' options.

Under the Expense tab in Concur

The screenshot shows the 'Expense' tab in Concur, displaying a table of 'Available Expenses'. The table has columns for 'Expense Detail', 'Expense', 'Source', 'Date', and 'Amount'. The 'Expense' column is highlighted in blue. The table contains three rows of data:

Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-...	Taxi (513500 - 513700)	☰	05/01/2015	\$17.74
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	05/20/2015	\$13.72
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	05/28/2015	\$10.95

Travel

1c. Add card charges to expense report (continued)

1. To move transactions into a report, select the box next to each transaction
2. Click the blue Move button and hit To New Report

Manage Expenses View Transactions

Manage Expenses

ACTIVE REPORTS Report Library →

+
Create New Report

THERE ARE NO ACTIVE EXPENSE REPORTS.
Click **Create New Report** to create a new report.

AVAILABLE EXPENSES

<input checked="" type="checkbox"/>	Expense Detail	Expense Type	Source	Date	Amount
<input checked="" type="checkbox"/>	VENETIAN/PALAZZO ROOM RSV LAS...	Accommodations (513500, 5...		06/27/2015	\$334.88
<input checked="" type="checkbox"/>	United Airlines 800-932-2732, TX	Airfare (513500, 513700)		06/29/2015	\$1,224.95

3. If you already created an expense report and want to add the expenses to that report instead, select the box next to each transaction
4. Click the blue Move button and select To Current Report

Available Expenses

<input checked="" type="checkbox"/>	Expense Detail	Expense	Source	Date	Amount
<input checked="" type="checkbox"/>	UBER TECHNOLOGIES INC 866-576-1039, CA	Business Meals (513500, 513700)		05/01/2015	\$17.74
<input type="checkbox"/>	UBER 866-576-1039, CA	Taxi (513500, 513700)		05/28/2015	\$10.95
<input type="checkbox"/>	UBER 866-576-1039, CA	Taxi (513500, 513700)		05/20/2015	\$13.72

5. Once all expenses related to the trip are entered into the expense report (including receipts) - press submit to begin the approval process

Helpful Links

[How to Add Card Charges to a Report](#)

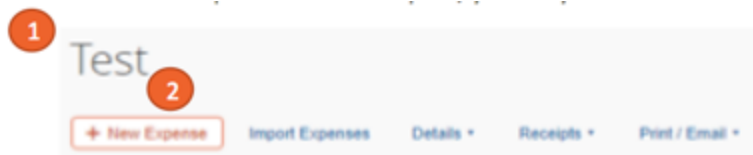
Travel

1d. Add an out-of-pocket expense

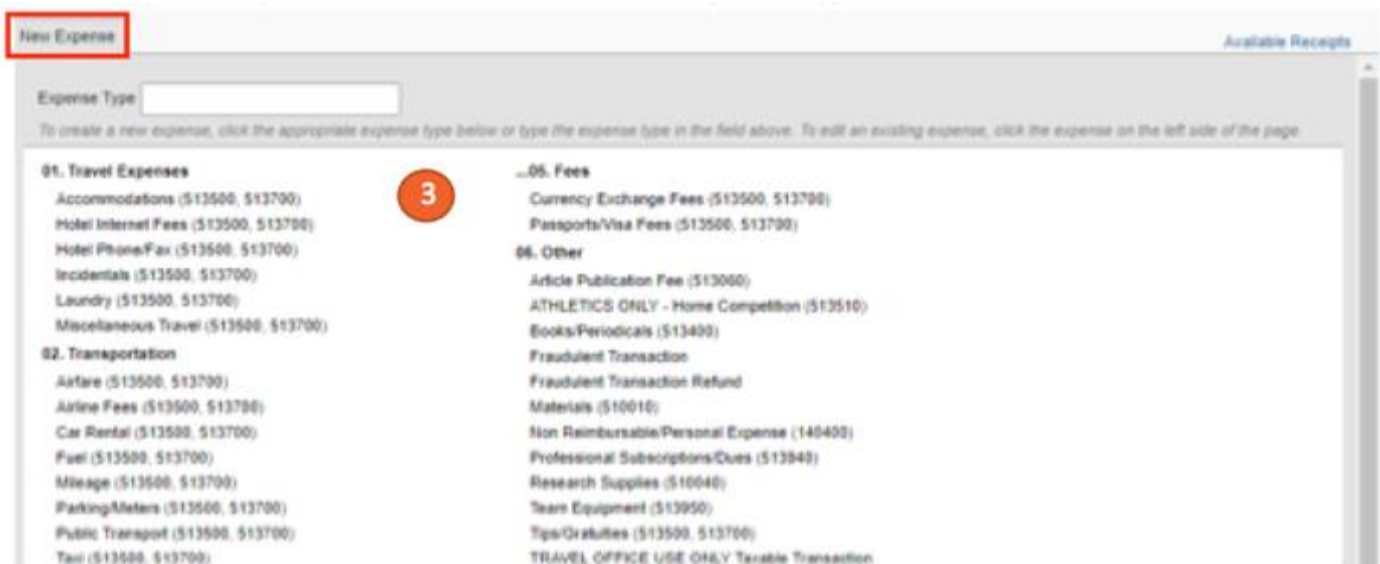
There are times when you have out-of-pocket expenses that you need to submit for reimbursement. Some examples include tip for cleaning service and parking meters.

To submit an out-of-pocket expense

1. First either open an existing expense report or create a new one
2. With the report open, click New Expense. (If there are no expenses on the report, you may not need to click New Expense.)



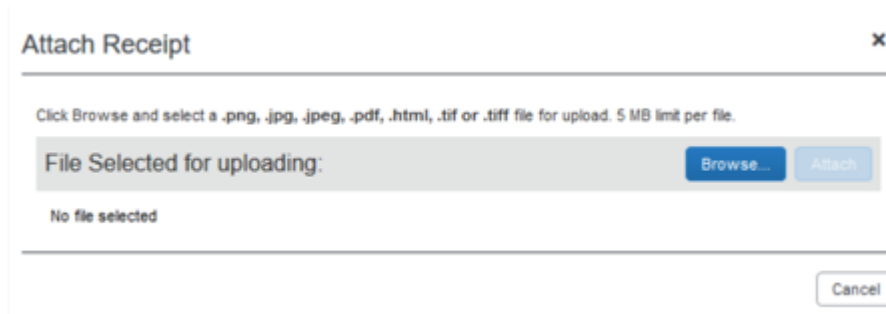
3. On the New Expense tab, select the desired expense type



Travel

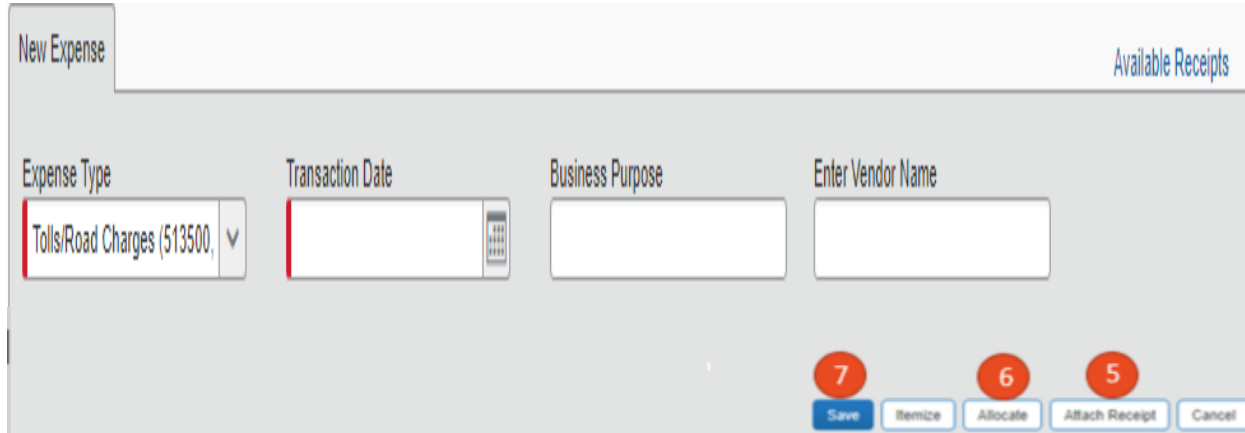
1d. Add an out-of-pocket expense (continued)

4. Complete the required and optional fields
5. Click Attach Receipts to upload supporting documentation



The image shows a dialog box titled "Attach Receipt" with a close button (X) in the top right corner. Below the title bar, there is a line of text: "Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file." Below this text is a grey box containing the text "File Selected for uploading:" followed by a "Browse..." button and an "Attach" button. Below the grey box, it says "No file selected". At the bottom right of the dialog box is a "Cancel" button.

6. Click Allocate to allocate the expense
7. Click Save



The image shows a "New Expense" form with a tab labeled "New Expense" and a link for "Available Receipts" in the top right. The form contains four input fields: "Expense Type" (a dropdown menu showing "Tolls/Road Charges (513500, v)"), "Transaction Date" (a date picker), "Business Purpose" (a text input field), and "Enter Vendor Name" (a text input field). At the bottom of the form, there are five buttons: "Save" (with a red circle containing the number 7), "Itemize", "Allocate" (with a red circle containing the number 6), "Attach Receipt" (with a red circle containing the number 5), and "Cancel".

Travel

1e. Approval flow

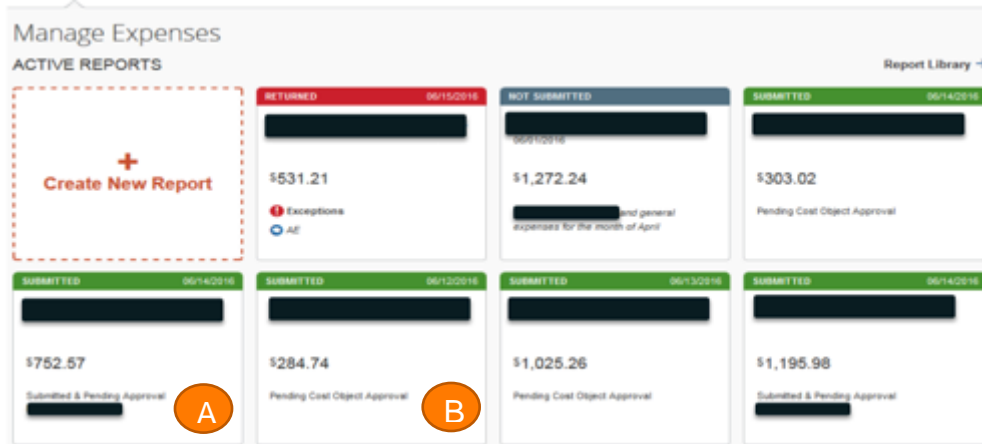
Expense reports in Concur start out with a three-step approval flow

1. The cardholder's direct manager/supervisor level
2. Cost object approver
3. Accounting review (which is done by the Travel Office)

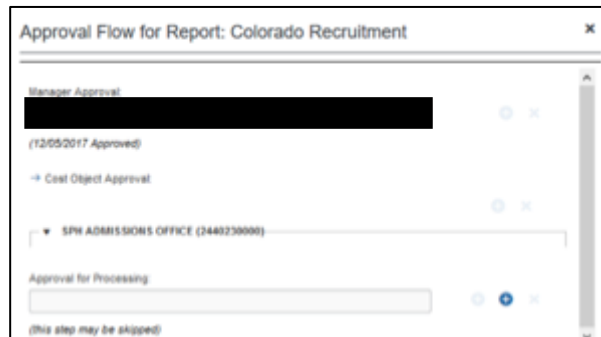
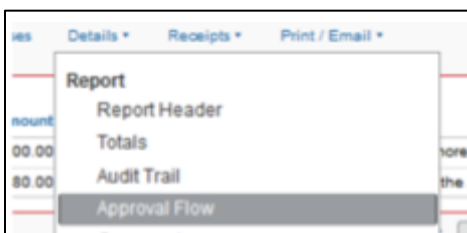
TIP: The cost object approver(s) will not be displayed until after the supervisor approver has approved the report.

Once an expense report is submitted, it will appear in the Active Reports section of the Expense tab in the Report Owner's Concur Profile. The report will also list the approval step it is in. For example

- A. If with Supervisor - "Submitted & Pending Approval ____" (displaying supervisor's name)
- B. If with Cost Object Approver - "Pending Cost Object Approval"



To view the approval flow, open the expense report, select the Details drop down, then Approval Flow.



Helpful Links

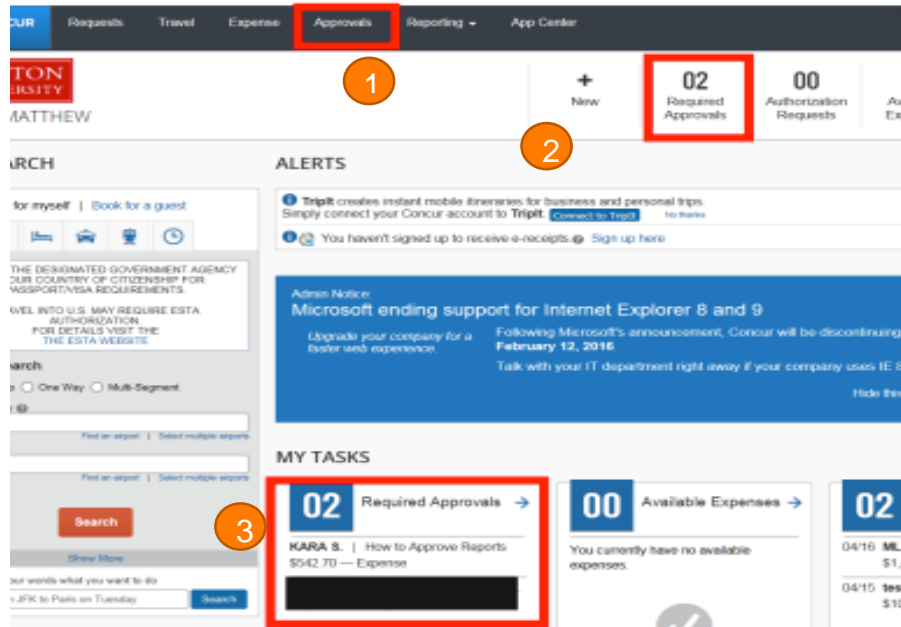
- [Understanding the Approval Flow](#)
- [Status of Expense Report](#)

Travel

1f. How to approve expense reports

From the Concur home screen, Reports pending approval can be found in three places

1. Upper left - "Approvals"
2. Upper right - "Required Approvals"
3. Under "My Tasks"



Select one of the options and the following display will appear, showing the available reports to approve

The screenshot shows the "Approvals" page with a table of expense reports. The table has the following columns: Report Name, Employee, Report Date, Amount Due Employee, and Requested Amount.

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
How to Approve Reports	[REDACTED]	09/31/2015	\$500.00	\$542.70
[REDACTED]	[REDACTED]	09/12/2015	\$0.00	[REDACTED]

Travel

1f. How to approve expense reports (continued)

1. To begin approving, select and click the Report Name ("How to Approve Reports")

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
How to Approve Reports		08/31/2015	\$500.00	\$542.70

2. Next click on the Details drop menu and select Report Header to review the details

Report Name	Amount	Requested	Report Summary
Totals	\$500.00	\$500.00	Report Totals
08/31/2015			Amount Due Company
08/31/2015	\$11.24	\$11.24	Amount Due Company Card
			Amount Due

3. Click Save or Cancel to exit Report Header screen

Report header for: How to Approve Reports

Report Name: How to Approve Reports	Report Id: 3BE399D79DA54DCBAF04	Report Key: 8100	Trip Purpose: Business Expense
Travel Classification: Domestic	User Name: SECHRIST, KARA	Start Date: 08/01/2015	End Date: 08/31/2015
Report Currency: US, Dollar	Receipts Received: Yes	Submit Date: 08/31/2015	Approval Status: Submitted & Pending Approval
Payment Status: Not Paid	Report Total: 542.70	Personal Expenses: 0.00	Amount Not Approved: 0.00
Amount Approved: 542.70	Amount Due (BU): 0.00	Amount Due User: 500.00	Amount Due *US Bank: 42.70
Total Amount Claimed: 542.70	Special Travel Included?: <input type="checkbox"/>	Cost Object: [1080130000] Travel & Expense Pfr	Does this report charge a grant/sponsored program?: No
Traveler Type: Staff	Comment:	Destination: United States	Does this trip involve multiple destinations?: <input type="checkbox"/>

Save Cancel

TIP: Review the start and end dates of your trip, as well as the General Ledger account and Fund Center number being charged!

Travel

1f. How to approve expense reports (continued)

4. Click on the Print/Email drop down menu and select BU Detailed Report

CONCUR Requests Travel Expense Approvals Reporting App Center

Approvals Home Requests Reports

How to Approve Reports [SECHRIST, KARA]

Summary Details **4** Print / Email
 BU Detailed Report

Expenses	Date	Expense	Requested	Requested
>	06/01/2015	Accommodations (513500, 513700) All Suites International, Boston, Massa	\$500.00	\$500.00
	06/11/2015	Taxi (513500, 513700) UBER, Boston, Massachusetts	\$11.24	\$11.24

Report Summary
Report Totals
Amount Due Company \$0.00

5. Review the Allocation Summary and then exit the window

5

Allocation Summary

*Custom1 - Cost Object
1060130000 (Travel & Expense Program) Amount \$542.70

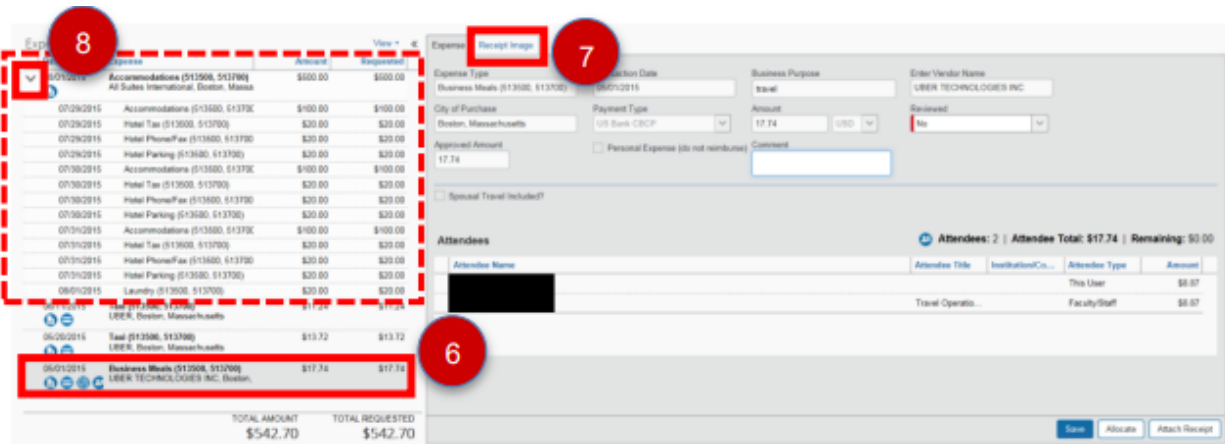
Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
Accommodations (513500, 513700)						
06/01/2015	Accommodations (513500, 513700)	travel	All Suites International	Boston	Out of Pocket	\$500.00
Business Meals (513500, 513700)						
05/01/2015	Business Meals (513500, 513700)	travel	UBER TECHNOLOGIES INC	Boston	US Bank CBGP	\$11.24
Allocations :		100.00% (\$17.74)	1060130000			
Taxi (513500, 513700)						
06/11/2015	Taxi (513500, 513700)	travel	UBER	Boston	US Bank CBGP	\$11.24
Allocations :		100.00% (\$11.24)	1060130000			
06/20/2015	Taxi (513500, 513700)	travel	UBER	Boston	US Bank CBGP	\$11.24
Allocations :		100.00% (\$13.75)	1060130000			

TIP: Scroll past the BU Detailed Report to get to the Allocation Summary. This is the fastest way to view each of the allocations contained in the report.

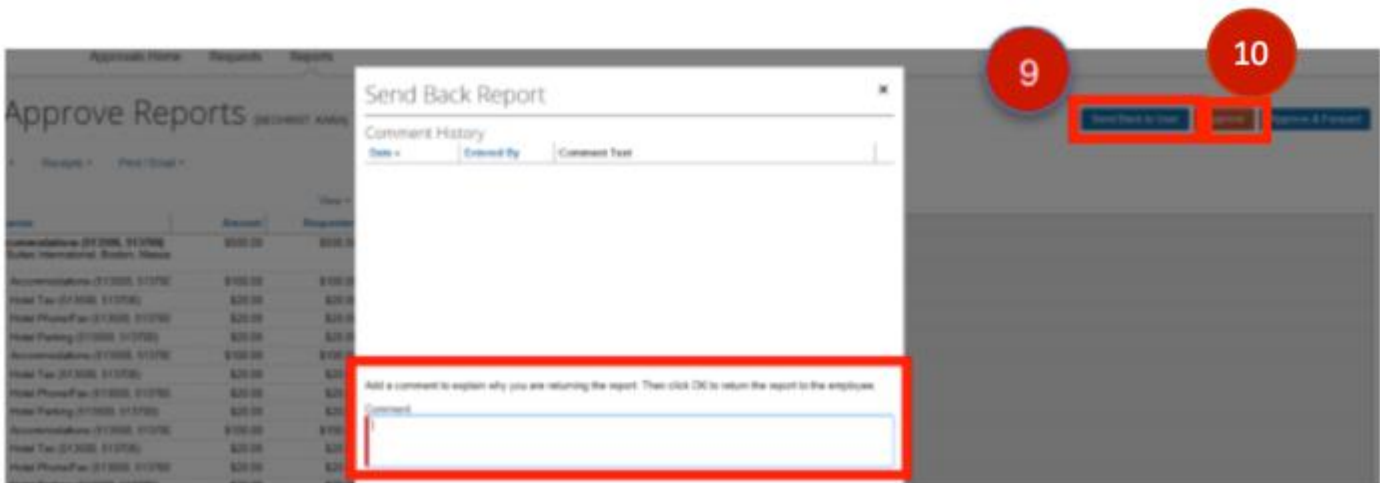
Travel

1f. How to approve expense reports (continued)

6. On the left hand side, click on each expense line item you would like to review
7. After reviewing the expense entry level information, review the receipt image - this must be repeated for each expense
8. Expand expenses by selecting the radial to the left to view itemizations



9. If changes need to be made, click the Send Back to User button and enter a detailed Send Back Comment so the user knows the reason
10. If the expense report passes audit, click the approve button



Helpful Links

[How to Approve Reports](#)

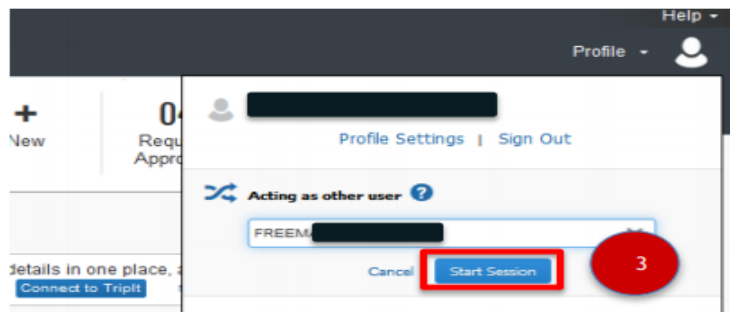
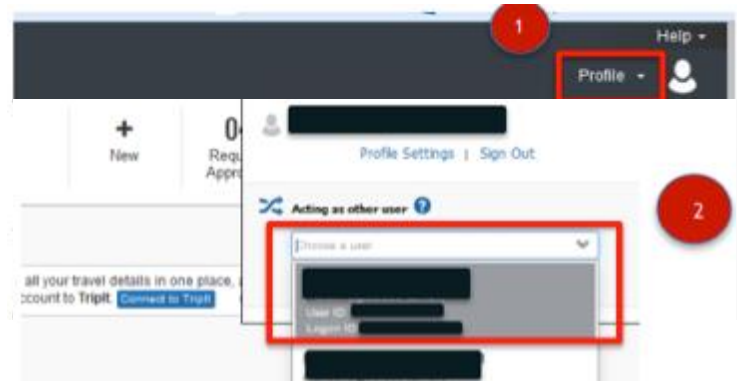
TIP: All accommodation expenses and meals with alcohol must be itemized.

Travel

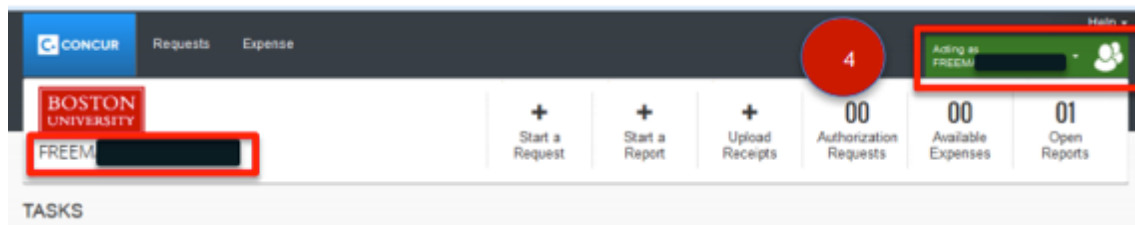
1g. Understanding delegates

Delegates are employees who are allowed to perform work on behalf of other employees. Once you have been set up as a delegate for another employee, you can prepare a report for them or approve expenses (depending on the role)

1. Click the Profile drop down menu in the upper right hand corner
2. A drop down will appear below "Acting as other user". Depending on the number of people you are set up as a delegate for, a list of available users may populate.
3. Select the user from the list, then hit start session



4. The upper right hand corner will now display "Acting as ___" and that employee's name



Helpful Links

[Understanding Delegates](#)

Travel

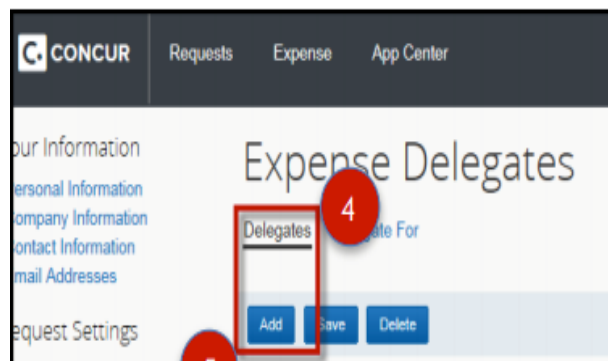
1h. Adding delegates

First you must be within the Concur Home Page

1. Click on Profile located on the right hand side of the Concur Home tab
2. Select and click profile settings to display Profile options
3. Select and click on expense delegates



4. Within the Expense Delegates tab, select delegates (to assign individuals)
5. Click the Add button to locate, search and select individuals you would like to give access

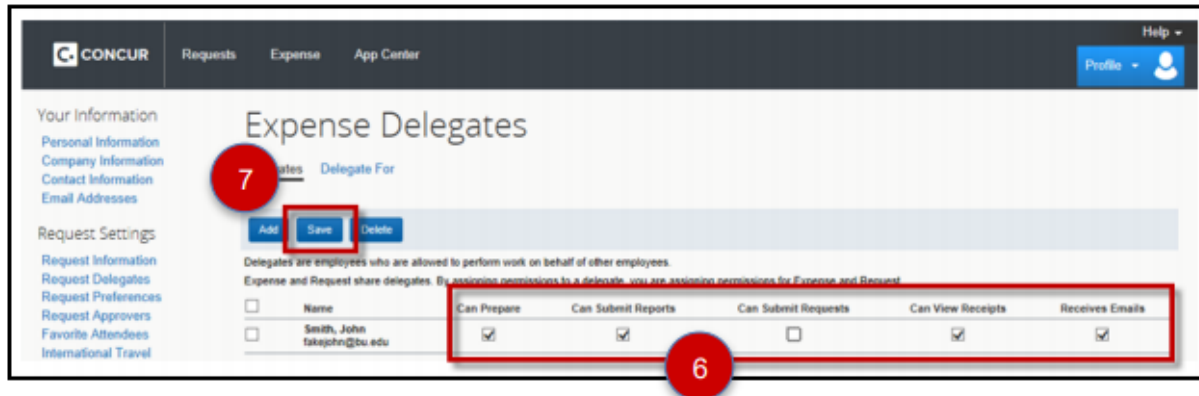


TIP: Click Delegates tab, NOT Delegate For. The Delegate For tab lists the employees you may act as a delegate for.

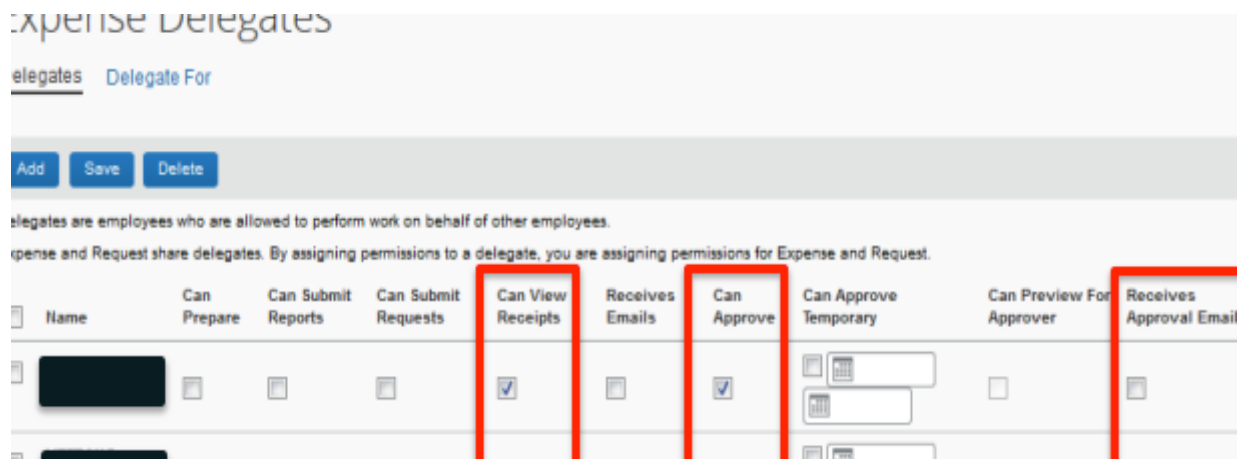
Travel

1h. Adding delegates (continued)

6. Select the desired level of permission to be granted via checking the box
7. Click Save to finalize delegate set up



Approval delegates and expense delegate set up are the same. The only difference for approval delegate is checking the "Can View Receipts," "Can Approve," and "Receives Approval Emails" boxes.



Helpful Links

[How to Add Expense Delegates](#)

Travel

2. Preferred vendors

Air

American Airlines
JetBlue Airlines
Porter Airlines
Emirates Airlines

Train/Bus

Amtrak
Boston Coach

Car Rentals

Avis Budget Group
Dollar Rent-a-Car
Enterprise/National Rental Car
Thrifty

Hotels

Club Quarters Boston Financial	Marriott Courtyard Brookline
Colonnade Hotel	Marriott Courtyard South Boston
Doubletree Guest Suites (Soldier Field Road)	Nine-Zero - Kimpton Hotel
Sheraton Boston	Omni Parker House
Holiday Inn Brookline	Residence Inn Fenway
Hotel Commonwealth	Fairmont Copley
Hotel Marlowe - Kimpton Hotel	The Inn at Longwood Medical
Hyatt Regency Cambridge	Loews Boston Hotel
Club Quarters (note – hotel outside of BU)	Furnished Quarters (note - long-term stays)



Helpful Links

[BU Preferred Travel Vendors](#)

Travel

3. Travel restrictions

Air Travel

- Air travel is reimbursable for economy airfare only (traveler is responsible for upgrade)
- The University will not reimburse or pay for a flight that is purchased with a traveler's own rewards (i.e. Frequent Flier Miles)
- Excess baggage charges and flight insurance are not reimbursed by the University

Air Travel under a Sponsored Program - Federal Travel*

- Federal regulations prohibit charging Business Class (or First Class) accommodations
- Travelers must comply with the Fly America Act, which requires travelers to use a U.S. flag air carrier or a foreign carrier that operates under a U.S. Flag air carrier code-sharing agreement and identifies the U.S. flag air carrier's designator code and slight number
- Reimbursement for the cost of food and alcohol is not allowed on federal awards

*For further information, contact Post Award Financial Operations (PAFO).

Rental Vehicles

- Do not obtain additional insurance coverage offered by domestic rental companies
- Mileage will not be reimbursed for rental vehicles
- Fines for traffic violations or parking tickets will not be reimbursed

Miscellaneous

- Laundry and dry cleaning during business travel of less than 5 days are not reimbursed
- Expenses related to personal/vacation days while on a business trip are not reimbursed

TIPS:

- Complete airfare bookings at least 14 days prior to scheduled trip departure.
- If renting cars internationally, obtain liability and collision coverage.
- For all meal expenses, alcoholic beverages must be separated on the expense report and charged to a non-sponsored discretionary account (automated in Concur).

Helpful Links

[Travel Policy](#)

Travel

4. Reimbursement

Transactions from the travel card feed into your Concur within ten days of the purchase date. You cannot, however, submit your expenses until after the trip/event has taken place.

Once your expense report has been submitted on Concur it will go through a three-step approval process. If the report has no issues, it will be approved and sent for payment.

If you have Direct Deposit, payment will be released the morning after you receive Concur's email stating payment has been sent. If you do not have Direct Deposit, checks will be mailed on the Friday following receipt of Concur's email.



Helpful Links

[Direct Deposit Sign Up](#)

Travel

5. Unassigned charges

All card transactions must be assigned to an expense report within 30 days of the transaction date regardless of when the Cardholder returns from a trip.

Please refer to table below for any charges that are not assigned within an expense report.

Within 30 days of transaction date	Cardholder will be notified via email to assign and process transactions in the expense management system.
Within 45 days of transaction date	Notification will be sent to cardholder and financial approver requesting that all transactions be assigned and processed in the expense management tool.
Within 90 days of transaction date	Notification will be sent to appropriate Dean or Vice President to escalate the issue (notifications to President or Provost may be warranted in certain circumstances.)

Transactions not assigned to an expense report within 60 days will be reviewed by the Travel Department, and the Cardholder's Travel Card will be placed on "hold" status until charges are assigned. "Hold" status means that new charges cannot be made using the Travel Card until the hold is released. After 120 days, as required by IRS Accountable Plan rules, these amounts will be considered taxable compensation to the employee on Form W-2 and subject to the appropriate tax withholding.



Helpful Links

[Travel Card Policy](#)

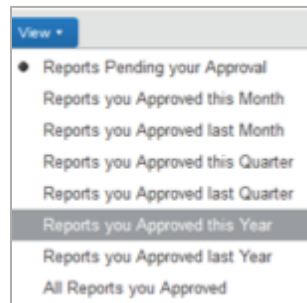
Travel

6. Reconciliation

This section explains how to reconcile your Concur expenditures with Business Warehouse (BW).

In Concur

1. Go to the Approval tab
2. Select Reports
3. Go to View and select the period you would like to reconcile



4. In the drop down section, select "Employee Last Name" → "Contains" → Type the last name of the cardholder you are looking to reconcile and click "Go"
5. The amounts found in the "Requested Amount" should be reconciled to the BW report

CONCUR Requests Expense Approvals 1

Approvals Home Reports 2

Expense Report List
Reports you Approved this Year

View ▾ 3

Employee Last Name Contains [Name] Go 4

Employee Name	Report Name	Comments	Status	Payment Status	Report Date	Date Submitted	Total	Requested Amount
[Name]	APNA		Approved	Sent for Payment	10/09/17	11/27/17	[Total]	\$2,132.98

⚠ This report has one or more entry level exceptions.

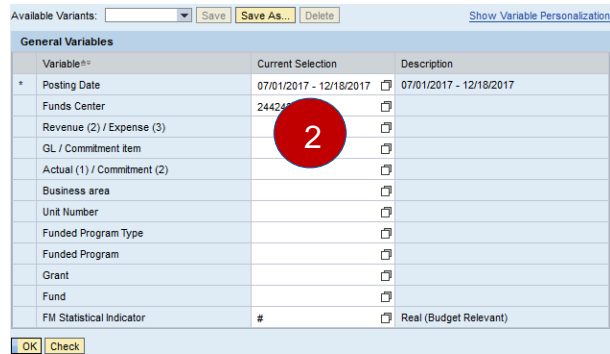
5

Travel

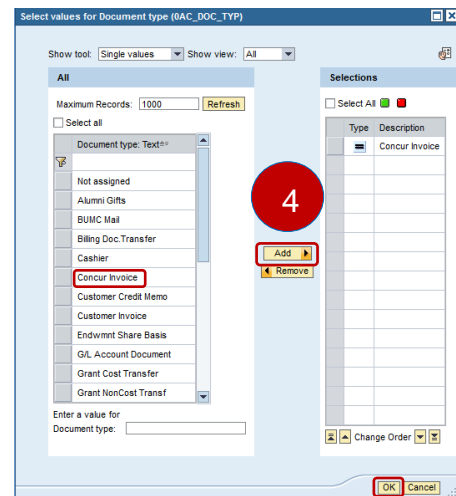
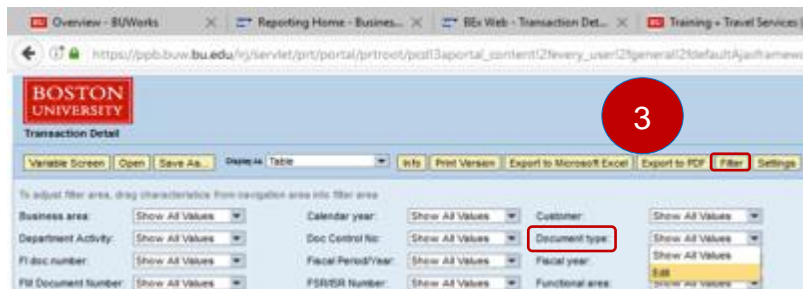
6. Reconciliation (continued)

In Business Warehouse (BW) Reporting

1. Run a "Transaction Detail" report
2. In the Variable Entry screen type your Fund Center and click OK



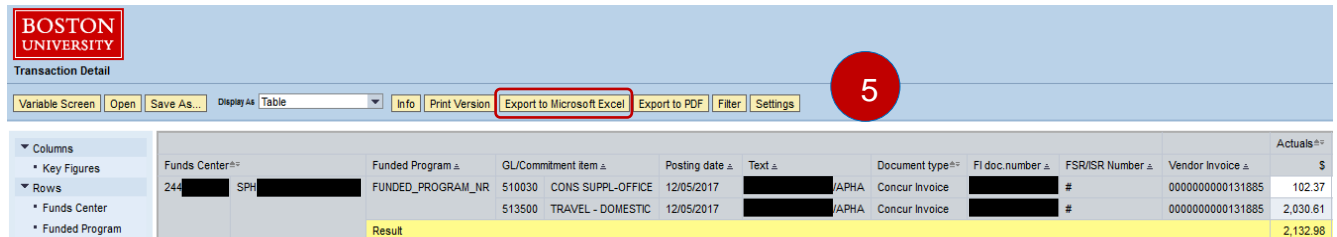
3. Click on Filter and "Edit" under the "Document Type" characteristic
4. Select Value "Concur Invoice," click Add, and press OK



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6. Reconciliation (continued)

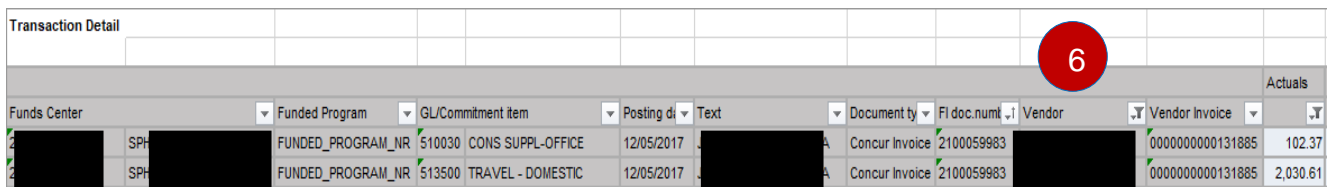
5. A screen with all Concur entries posted in BW will show up. Click on "Export to Microsoft Excel"



The screenshot shows the Boston University Transaction Detail interface. The 'Export to Microsoft Excel' button is highlighted with a red circle containing the number 5. The table below shows transaction details for two rows.

Funds Center	Funded Program	GL/Commitment item	Posting date	Text	Document type	FI doc.number	FSR/ISR Number	Vendor Invoice	Actuals
244	SPH	FUNDED_PROGRAM_NR 510030	12/05/2017	CONS SUPPL-OFFICE	/APHA	Concur Invoice	#	000000000131885	102.37
		513500	12/05/2017	TRAVEL - DOMESTIC	/APHA	Concur Invoice	#	000000000131885	2,030.61
Result									2,132.98

6. In your Excel spreadsheet, filter on "Vendor" and select the same last name you chose in your Concur expense report



The screenshot shows the Transaction Detail screen with the 'Vendor' column filtered. A red circle with the number 6 is placed over the 'Vendor' column header. The table below shows the filtered data.

Funds Center	Funded Program	GL/Commitment item	Posting date	Text	Document type	FI doc.number	Vendor	Vendor Invoice	Actuals
	SPH	FUNDED_PROGRAM_NR 510030	12/05/2017	CONS SUPPL-OFFICE	Concur Invoice	2100059983		000000000131885	102.37
	SPH	FUNDED_PROGRAM_NR 513500	12/05/2017	TRAVEL - DOMESTIC	Concur Invoice	2100059983		000000000131885	2,030.61

You can now reconcile each line on both reports. Transactions not found in BW reporting should be added at the bottom of the excel spreadsheet and reconciled once they have been approved in Concur.

TIP: Please allow 3 to 5 business days for expenditures to post in BW Reporting once they have been approved in Concur.

Travel

7. International travel

There are many important issues to consider when traveling internationally. Below are some of the helpful resources and information available to BU travelers. Before traveling internationally, we encourage consulting with the [Global Programs](#) office.

You should consult the [BU International Travel Risk Policy](#) before making any plans to go abroad, as it provides valuable tools designed to ensure your [health, safety, and security](#) while traveling, such as

- Guidance on how to [register](#) your international travel plans with us for planning and emergency support
- Restrictions on travel to [high-risk destinations](#) for certain travelers
- Requirements and minimum standards for [insurance and emergency evacuation coverage](#)
- What happens when an evacuation instruction is given
- Guidance on [export controls](#)



Please note that health insurance coverage is strongly encouraged for international travel and that all Boston University employees are covered by an evacuation/emergency travel assistance plan when travelling abroad on University business.

TIP: As a basic guide to help you organize your preparation, use our international pre-departure checklists for [Faculty and Staff](#) and for [Students](#).

Helpful Links

[International Travel Resource](#)

[Manage International Travel](#)

[Pre-departure Checklist](#)