

Onboarding: Travel and Expense Reports

Understand when to use travel and expense reports and be able to create and submit an expense report

Travel Card

- Should be used for travel expenses (travel, lodging, meals, taxis, conference registration fees)
- Transactions will automatically appear in Concur profile
- Transactions must be assigned to an expense report within 30 days

Expense Reports

- All expenses related to a trip or event should be submitted on one report within 30 days of the return date
- Local expenses (meals, taxis, out of pocket business purchases) can be submitted on a monthly report

Guest Accounts

- Used to reimburse students and visitors
- Request access at the BU Travel Services website
- My department guest account name: _____

Concur Profile

Activity: Download and sync mobile app

- Download Concur App
- On desktop, go to Profile Settings > Mobile Registration
- Create a pin
- Open Concur Mobile App and enter pin

Activity: Set up expense delegates

- Go to profile settings > Expense Delegate
- Add anyone who should be able to see and/or edit your reports
- For approvers, add anyone who should be able to approve on your behalf

Expense Report Process

Activity: Create an expense report

- Create an expense report
 - Name report with description of trip, event, or expenses
 - Assign cost object (the account that should be charged)
 - Accounts that start with 9 require two zeros in front of the account number
- Add travel card transactions and out of pocket expenses
- Attach receipts to each expense > \$25
- Attach list of attendees to any meeting expenses or business meals
- Submit report after event or travel has ended

Notes:
