

Admins Travel Meeting August 2019

Topics:



Concur Travel Process



Foreign Travel Request / FTMS



PPPL Visitors / Non-Employees



PPPL Travel Card

Concur Travel Process

- Traveler enters a trip request
 - Attaches all required documentation
 - Conference/workshop agendas
 - Registration Form
 - Airfare cost comparison
 - FTMS Form
- Adds additional approver to workflow if needed (ie. Dept Head for foreign travel)
- Submits trip request
 - Concur sends a notification to Traveler's supervisor
 - Trip Request gets routed to cost center approver
 - LLC members' domestic trip request routes to Travel Office
 - LLC members' foreign trip request routes to Supervisor or Director's Office, then Travel Office

Concur Travel Process

- Cost center approver reviews trip request and confirms budget; may add additional approvers to review (ie. Dept Head or project manager)
- Travel Office reviews trip request and confirms compliance; may add additional approvers to review
- Travel Office confirms all required internal approvals have been obtained
- Concur sends approval notification to traveler to begin booking travel arrangements.

Foreign Travel Request / FTMS

- When a foreign trip request is (*internally*) approved in Concur, a report with trip summary will be generated and sent to admins daily (FTMSadmin@pppl.gov)
- Traveler is responsible to provide all pertinent info to their admins to enter into FTMS system
- TO reviews Trip Request in FTMS, and routes request to DOE for approval and State Department for country clearance
- When FTMS is approved, TO uploads the eCC to the request and sends notification to the Traveler
- Travelers **CANNOT** commence the trip without country clearance

PPPL Visitors / Non-Employees

- PPPL Visitors / Non-Employees do not have access to PPPL Concur
 - Visitors
 - Retirees
 - Sub-contractors
 - Interviewees
 - New Hire Relocation
- Their profiles are created manually by following the process below:

PPPL Visitors / Non-Employees

- A PPPL employee (host) has a business need to host/sponsor a visitor or non-PPPL employee's travel, such as:
 - Interview travel,
 - Relocation travel,
 - Visitor travel,
 - Student travel, etc.,
- The host, or the host's admin (if delegated) sends an email to the Travel Office with the following information:
 - Traveler's First Name
 - Traveler's Last Name
 - Name of the Delegate (PPPL employee who will be responsible for:
 - Completing the traveler's profile,
 - Completing and submitting the travel request,
 - Booking travel arrangements or notifying the traveler when they can book,
 - Completing and submitting the travel expense.)

PPPL Visitors / Non-Employees

- Travel Office notifies the Delegate with a copy to the host that a visitor profile has been created for the traveler
- The host / delegate is responsible for obtaining the following information from the visitor in order to set up the travel profile in Concur (not required for trip request, but required for travel booking)
 - Gender
 - Date of Birth - considered PII and should be obtained over the phone or through PU Secure Email Portal
 - Mobile Phone Number
- Host/delegate enters trip request in Concur and submits on behalf of the visitor, and waits for an approval.
 - The delegate should email accounts_payable@pppl.gov to provide the visitor's email address at this time. This will allow Accounting to work with the visitor in order to have them set up in PU's Supplier Management System, which will ultimately expedite their reimbursement after their expense report is processed.
 - Once the vendor ID is set up, Accounts Payable will update the Vendor ID field in visitor's Concur profile.

PPPL Visitors / Non-Employees

- Once the trip is approved, the delegate will receive an email notification, and can proceed to book the travel arrangements in Concur or with Graycar.
- At the conclusion of the trip, the delegate is responsible for completing the expense report for the trip.
 - A pdf version of a complete expense report printed out of Concur should be signed by the visitor, certifying that the expenses listed on the report are accurate and were incurred while on official PPPL business.
 - The signed expense report should be attached to the expense report in Concur, and routed for proper approvals and reimbursement.

PPPL Visitors / Non-Employees

PPPL Expense Report Details
Report Name : Princeton, NJ

Employee Name : Chang, Kar Yee
Employee ID : 940000595

Policy : *PPPL-US Expense Policy

Business Purpose : test
Report Key : 38
Request ID : 379K
Report Start Date : 06/09/2019
Report End Date : 08/17/2019
Approval Status : Not Submitted

*Did this trip include personal days? : No

Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
07/09/2019	Hotel		Marriott Hotels	San Diego	Cash/Out of Pocket	\$220.00
Personal Expense (do not reimburse) : No						
Meals & Incidental Expenses (M&IE)						
07/06/2019	Meals & Incidental Expenses (M&IE)			Princeton	Cash/Out of Pocket	\$61.00
Allocations : 100.00% (\$61.00) PPPL*-6341-****-NUL-Domestic-Other Personal Expense (do not reimburse) : No						
07/05/2019	Meals & Incidental Expenses (M&IE)			Princeton	Cash/Out of Pocket	\$61.00
Allocations : 100.00% (\$61.00) PPPL*-6341-****-NUL-Domestic-Other Personal Expense (do not reimburse) : No						

07/04/2019	Meals & Incidental Expenses (M&IE)	Princeton	Cash/Out of Pocket	\$61.00
Allocations : 100.00% (\$61.00) PPPL*-6341-****-NUL-Domestic-Other Personal Expense (do not reimburse) : No				
07/03/2019	Meals & Incidental Expenses (M&IE)	Princeton	Cash/Out of Pocket	\$61.00
Allocations : 100.00% (\$61.00) PPPL*-6341-****-NUL-Domestic-Other Personal Expense (do not reimburse) : No				
07/02/2019	Meals & Incidental Expenses (M&IE)	Princeton	Cash/Out of Pocket	\$61.00
Allocations : 100.00% (\$61.00) PPPL*-6341-****-NUL-Domestic-Other Personal Expense (do not reimburse) : No				

Note: The sum of allocation amounts may not exactly match the expense amount due to rounding.

*Company Code	*Cost Center	*Work Package	*Job Package	Approved Amount
PPPL*	6341	****	*NUL	\$525.00

Payment Type	Approved Amount
Cash/Out of Pocket	\$525.00

PPPL Disbursements	
Amount Due Employee :	\$525.00
Amount Due PPPL Travel Card :	\$0.00
Amount Prepaid by PPPL :	\$0.00
Total Paid By Company :	\$525.00
Amount Due Back to PPPL	
Personal Expenses Prepaid by PPPL :	\$0.00
Amount Due Company Card From Employee :	\$0.00



PPPL Travel Credit Card

- When travelers set up their profiles or make travel arrangements in Concur, they must provide their personal credit card information as hotel / rental car guarantees
- PPPL corporate card will still be used to prepay for airfare and Amtrak train
- Visitors booking will be guaranteed with Department Admins PPPL Travel Credit Card
- **Travel Office's credit card will no longer be valid as of Oct 1, 2019.**

Questions? Comments?