SAFE/Concur Integration with Travel Warning Functionality
(for individual projects only – not groups)

Travel Warning Country Maintenance

A list of travel warning countries will be maintained within SAFE by the Super User. When countries are moved on and off the warning list, email notifications will go out to those applicants whose projects have not yet started based on the project start date.

![Image of Travel Warning List Countries]

Travel Warning Notifications to Applicants

Applicants are informed on a number of different pages if any of the countries they have selected are on the warning list. The first location is on the “Search for Funding” screen. Students who will be traveling internationally will need to select the destination country from a drop-down list. Any countries on the warning list will be marked as such, with a warning that travel will not be permitted without a waiver, and with a link to the travel website. Students will be reminded of the warning list status on the “My Projects” page where there is a new section for each project titled “Travel Warning(s)”.

![Image of Travel Warning Notifications to Applicants]
Students will see similar notifications on the Edit Project and View Project pages.

Placing the mouse over each country will provide more details about the status of the country within SAFE and what it means to the applicant.

Once a project is submitted, the applicant will see a notification where additional instructions may appear indicating if travel waiver is required.

**Concur Travel Request Entry**

When an applicant is ready to create a travel request in Concur, s/he will log in to the Concur website at [https://www.princeton.edu/concur](https://www.princeton.edu/concur).

The Concur travel request form has two fields labeled “Travel Type” and “Program”. These fields are used to map the travel request type to an activity type in SAFE. Below is a table of the mapping. Some activity types such as Summer Study Abroad and Internships will match regardless of the “Program” selected. Others require specific “Program” values to be selected in order to match.

**NOTE**: SAFE and Concur are not linked for Group Projects on or off campus.

<table>
<thead>
<tr>
<th>SAFE Activity Type</th>
<th>Concur Travel Type</th>
<th>Concur Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Thesis Research</td>
<td>Undergrad Academic</td>
<td>Sr Thesis Rsrch w/o ODOC funding</td>
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<tr>
<td>Summer Study Abroad</td>
<td>Undergrad Study Abroad: Summer</td>
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<td>Internships</td>
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<tr>
<td>Independent Projects</td>
<td>Undergrad Academic</td>
<td>Independent Research</td>
</tr>
<tr>
<td>Independent Projects</td>
<td>Undergrad Special Proj/Ind Wrk</td>
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</tbody>
</table>

Once a student submits a travel request and an approver approves the request, a notification is sent to SAFE. SAFE retrieves the details of the travel request and of the student making the request.

If the trip destination includes a country on the Warning List, SAFE will not show that the trip has been approved, or “accepted” until Travel Oversight Group* administrators have also approved a waiver for this trip. A funder will only see the “accepted” note in SAFE after the travel is approved in Concur AND any required travel waivers have been granted.
Concur Travel Request/SAFE Project Matching

Once an approved travel request is received from Concur, a process within SAFE will attempt to match and link that request to an existing unmatched project. There may be a slight delay of a few minutes in sending the information from Concur to SAFE. The matching occurs in this order.

1. Find all locked projects for the student by PUID and Activity Type.
2. If projects exist, compare the travel dates received from the Concur travel request to the project dates in SAFE. A match is made if at least one of the following is true:
   a. The project start date is between the Concur travel dates or equal to the Concur travel start or end date.
   b. The project end date is between the Concur travel dates or equal to the Concur travel start or end date.
   c. The project start and end dates are between the Concur travel dates or the project start date is equal to the Concur travel start date and the project end date is equal to the Concur travel end date.
   d. The Concur travel dates are between the project start and end dates.

If only one project exists which passes these checks, then a match is made and the travel request status is marked as Accepted. If no projects match or more than one project matches, the status will remain as Pending.

For each SAFE project, ALL current approved travel requests for a given student will be displayed in the form of a list, even if those requests are for another project for the same student. (This information is available on both the Award Funding and View Project pages; in addition, the pending/accepted status will show in the funding opportunity’s projects list.) If SAFE can “match” a request, the matched travel request will be at the top of the list. From this list, the funder will be able to match or un-match the appropriate travel request for this project. That is, the funder (or, in the case of multiple funders, the first funder making an award) will be able to override and change any automatic matching that SAFE provides.

If SAFE incorrectly matches a travel request with a project, the user can “un-match” that request and then choose the correct travel request to associate with the project. If a travel request is put in before the SAFE project is created and locked, that travel request will be an “orphan” for a while, until the project is created in SAFE. After the project is created and submitted, the funder can “match” that orphan travel request with the new project.

Travel Warning Notifications to Administrators

On the Award Funding and Pay Award pages, Administrators will see the status of the travel request along with any countries on the warning list that have been selected by the applicant.
The Travel Request Status will have four values:

1. **Not Available** – Displayed if there is no travel request record in the system.  
   [Note: Projects created prior to the Concur integration would have this status. Until the old travel database is phased out and all travel is registered in Concur only, funders will need to check the old travel database to see if a “Not Available” message in SAFE indicates that the trip is registered in the old system.]

2. **Not Applicable** – Displayed for On Campus projects where there is no travel.

3. **Pending** – Given when the request is initially created.

4. **Accepted** – Given when a travel request is returned from Concur and it has been matched to the project.

When a travel request is returned and matched to a project, it will be marked as Accepted and any travel information will be displayed. If a travel request and project are manually matched, this information will pull over at the time of the matching. Once the Travel Request Status is marked as “Accepted,” funders are free to release funds in the form of direct deposit, a transfer into the student account or an interdepartmental transfer. IMPORTANT NOTE: The travel information that is shown in SAFE is drawn from the student’s initial travel request in Concur. That is, it is only the student’s best guess at his/her itinerary, prior to having funds available to purchase tickets, complete housing arrangements, etc.; it is not the final travel itinerary. The Concur system will automatically generate an email to students to let them know to update their travel details by sending them to plans@Concur.com as soon as they are available. In addition, several automated reminders will be sent to the students to prompt them to complete this step. This is NOT the responsibility of SAFE funders. Funders should be sure to include language in their award letters describing their own policy on return of funding should the student’s final travel plans differ significantly from the original travel request.
Final Note: SAFE funders have done their due diligence when they see that a Travel Request Status shows as “Accepted.” Some funders may require students to provide a final report and receipts upon the completion of the project and may establish policies regarding the return of funds if the final project does not match the details provided in the application or in the Concur travel request. In 95% of situations, this is the end of the SAFE funders’ responsibilities, as far as travel is related. In a few very special circumstances, however, funders may wish to require students to complete additional steps prior to the release of funds or after the funds have been released, but before the project is completed. (Such additional measures are purely optional to funders; they are by no means required by Concur or SAFE administrators, or by the Travel Oversight Group*.)

1) Funders may require an in-person discussion with the student traveler about their travel plans prior to releasing funds. Funders might want to take this step when there is a special safety situation related to the travel destination and/or when the funder is also the sponsor/organizer of a particular program. This ensures that students are fully informed prior to departure but does not guarantee that there will be no changes to the final itinerary from the original travel request.

2) Funders may require students to copy them when they send their updated travel itineraries to Concur (via email). Before taking this step, funders should know that this can lead to a significant increase in email and the need to keep travel information filed somewhere outside of SAFE. It also does not ensure that the student will copy the funder with subsequent itinerary updates. For these reasons, this approach is not recommended unless there are very special circumstances.

*The Travel Oversight Group is the group responsible for responding to any traveler emergencies, ranging from individual student traveler health issues to country-specific/regional disruptions. The Travel Oversight Group receives alerts and notifications whenever a traveler needs assistance or whenever a natural disaster or political/social disruption may pose a safety hazard for multiple travelers. The Travel Oversight Group is fully responsible for providing assistance in these situations. The group consists of: Chris Burkmar (Office of the Vice President for Campus Life), Nancy Kanach and Mell Bolen (Office of International Programs/ODOC), Megan Adams and Missy McGinn (Risk Management/F&T), Diana Davies (Provost’s Office) and Cindy Shumate (Finance and Treasurer).