Business Purpose Guide

A necessary expense is one for which there exists a clear business purpose and is within University expense policy limitations. The business purpose must support or advance the goals, objectives and mission of the university, and adequately describe the expense as a necessary, reasonable and appropriate business expense for the University. The specific business purpose of each transaction should be clearly stated on expense submissions, explaining why the University has incurred the expense. The "why" should include the primary reason for the expense.

Much of the information needed to describe each expense is covered with the information gathered at the expense line creation. As described in the table below, the required fields in Concur capture most of the information needed to support a valid business expense.

Who/What/Where/When/Why

Who	This is typically answered by the employee submitting the expense report. When an expense is incurred on behalf of someone else, such as a student or guest, the name of that individual should be included in either the Business Purpose or Department Reference field
What	This is usually answered by the expense type, so please ensure you are selecting the most appropriate expense type
Where	The location of the expense is often identified in the location field. When this is not the case, if other support doesn't indicate location this can be included in the comment field
When	The transaction date will often identify the when. If not, you can include the dates in either the Business Purpose or Department Reference field (i.e.: Big 10 Conference March 1-March 3, 2015)
Why	The **"why"** is the most important piece of information to support a business need. This describes why the university is paying for the expense so this should support the missions of the university.

In order to assist with the **"why",** we have added an enhancement to Concur to guide the user to the necessary information. Effective August 25, 2015 the Business Purpose Category field has been added as a required field. Depending on the category selection, additional information related to the business purpose may or may not be required. When additional information is required, specific guidance appears in parenthesis next to the category name.

Both, the business purpose category and the business purpose detail fields are optional at Report Header. If values are chosen for either of these fields, the value entered will copy down to all lines in the expense report. Business purpose category and details can be modified on the individual expense line if needed.

The table below lists the categories, need for further information and the specific guidance the user will see if additional information is required:

Business Purpose Category	Additional Details Required?	Business Purpose Details
Conference	Yes	Please include the name of the conference along with conference dates in Business Purpose Details. If the expense is incurred on behalf of another individual, include the name of that individual.
Development	Yes	Please include the name of the individual (donor) in Business Purpose Details unless the donor's name is confidential. If the name of donor is confidential, enter "confidential" in Business Purpose Details.
Instructional	No	N/A
Other	Yes	Please explain **why** this is a business expense in Business Purpose Details.
Patient Care/Patient Related	No	N/A
Personal Expense	No	N/A
Professional Development	Yes	Please include the name of program and the program dates in Business Purpose Details. If the expense is incurred on behalf of another individual, include the name of that individual.
Recruitment	Yes	Please include the name of the individual (recruit) in Business Purpose Details unless the recruit's name is confidential. If the name of recruit is confidential, enter "confidential" in Business Purpose Details.
Research	No	N/A

Statement of Account

If there is a value entered in the business purpose details field that value will post to the general ledger in MPathways. If no value is entered in the business purpose details field, the selection made at the business purpose category will post to the general ledger in MPathways.