Overview: The Air Class of an airline ticket significantly impacts whether the ticket is allowed for purchase when using both Duke funds and those associated with federal sponsors. When processing any airline ticket, users must provide the air class. Based on the class and the funding source (Duke funds, federal funds, or other sponsored funds), additional documentation may be required.

Step 1
Working in a Travel expense report, in an Expense, an exception message appears for the airfare expense type indicating the Air Class is necessary. Select the box next to the expense and select Edit to open the Expense Details.

Step 2 – Selecting Coach/Economy Airfare – Example 1
In Expense Details, ensure all required fields (red exclamation mark and red asterisk) are complete. Select the appropriate AirClass. If Coach/Economy is selected, no additional approvals/information is required. Select Save Expense. Continue working with the expense report and attach the receipt as necessary.

Questions? Visit Contact Information at concur.duke.edu or email EmployeeTravel@duke.edu.
Step 2 – Selecting Business Class Airfare OR First Class Airfare – Example 2

In Expense Details, ensure all required fields (red exclamation mark and red asterisk) are complete. Select the appropriate Air Class. If Business Class or First Class is selected, additional information is required and a new box displays. In the Federal Funds Used field, select Yes or No based upon the funding source used for this expense. If federal funds are used a new box displays. In the Sponsor/Agency approval obtained, Documentation attached field, select Yes or No to indicate if sponsored approval has been obtained. If federal funds are not used, management center approval is required.

Please note:
- Sponsor approval is required and must be attached to the expense report for a travel class other than coach/economy.
- If sponsor approval is attached, management center approval is not necessary.
- Management center approval is required for all non-federal sponsored funds or Duke funds per Duke policy.
- If a user indicates federal funds are not being used and they are included in the report (at the expense or headers level) an error message requiring correction displays.
Step 3
Select Add Receipt or drag and drop files to attach the appropriate documentation to the expense (sponsor approval documentation, management center approval, as appropriate) and receipt(s).

Step 4
Once all information is entered, ensure all required documentation is attached in the receipt section including the receipt supporting the expense, select Save Expense.
Step 5

In the **Expense** screen, notice the message at the bottom indicating the expense has been saved.

Step 6

Continue working through each expense, paying attention to icons and exception messages, providing details, and attaching receipts, as required.
Helpful Hints

▪ Duke’s travel policy allows Coach/Economy rates for airline tickets for Domestic Travel and prohibits first or business class airfare. Any exceptions must receive prior management center approval and approval must be attached to the expense report. For International Travel, economy and business class airfare is allowed with prior approval being required for first class travel. Please refer to Duke’s policies for Domestic and International Travel.

▪ Travel paid for by federal funds are subject to federal sponsor guidance. Non-federally sponsored funds are subject to sponsor guidance and appropriate documentation should always be attached.

▪ Department and funding source approvers are responsible for thoroughly reviewing expense reports ensuring the appropriate documentation is attached to the report. Approvers should validate the expense meets allowability, allocability and reasonableness requirements for the sponsored projects being charged. Exceptions to sponsor policy or guidance, must have prior approval from the sponsor that is attached to the expense report.

▪ If a user selects “No federal funds are being used” in the Federal Funds Used box but a federal funding source is involved through the expense report, allocation, or it’s set on the header record, an audit rule is triggered and the box will need to be corrected before completing the expense report.