

Concur Travel and Expense Management

Travel Expense Report Basics

Travel Expense Report Basics

This guide will illustrate:

- How per diem is added to an Expense Report
- How to itemize a hotel receipt
- How to calculate personal car mileage

To begin:

- Log into **udel.edu/concur** using your UD credentials
- Click on the **Requests** tab at the top of the Concur home page



Manage Requests

ARPA-E Summit \$2,868.00

Approved | Request ID: 6EUP

More Actions

Create Expense Report

EXPECTED EXPENSES

Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
	Air Ticket	Philadelphia (PHL) - Denver (DEN) : Round Trip	05/22/2022	\$908.00	\$908.00
	Hotel Reservation	Denver, Colorado	05/22/2022	\$978.00	\$978.00
	Conference Registration/Fees (not hosted by UD)	ARPA-E Summit Registration	05/22/2022	\$695.00	\$695.00
	Ground Transportation	Taxi round trip from airport to hotel	05/22/2022	\$50.00	\$50.00
	Meal Per Diem	Denver, Colorado	05/22/2022	\$237.00	\$237.00
					\$2,868.00

- From the Requests tab, select the approved Travel Request
- Click **Create Expense Report**

Your Report Header will be pre-filled with the information from your request

Create New Report

Create From an Approved Request

Expense Report Type *
*UD-Travel Expenses

Report/Trip Name *
Report/Trip Start Date *
MM/DD/YYYY

Report/Trip End Date *
MM/DD/YYYY

Primary Report/Trip Purpose *
None Selected

Traveler Type *
02: Staff/Grad Student

Employee Department
PROCUREMENT SERVICES (04750)

Trip Type *
None Selected

Does this trip include personal travel? *
None Selected

Personal Travel Dates

Trip Details *

Report Total

Speedtype *
Search by Code

Project ID
Search by Code

UD User Field
Search by Code

Work Order #
Search by Code

Comments To/From Approvers

Claim Travel Allowance
Will this trip include per diem? If you are creating a Goods and Services Report, select 'No'

Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance

- Calculate your Travel Allowance (per diem) by selecting **Yes**
- Click **Next**

Next: Create report and add itinerary details for your travel allowances

Cancel **Next**



Itinerary Info

Itinerary Name: Selection:

[Add Stop](#) [Delete Rows](#) [Import Itinerary](#)

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
--------------------------	----------------	--------------	-----------------------

No Itinerary Rows Found

New Itinerary Stop

Departure City:

Date: Time:

Arrival City:

Date: Time:

[Save](#)

[Go to Single Day Itineraries](#) [Next >>](#) [Cancel](#)

If your Itinerary Rows do not appear in the Itinerary Info box, click **Available Itineraries**



Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
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Available Itineraries

Current Itineraries

Delete

Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
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Itinerary: ARPA-E Summit

Philadelphia, Pennsylvania	05/22/2022 08:00 AM	Denver, Colorado	05/22/2022 11:00 AM	DENVER COUNTY, US-CO, US
Denver, Colorado	05/25/2022 08:00 AM	Philadelphia, Pennsylvania	05/25/2022 11:00 AM	PHILADELPHIA COUNTY, US-PA, US

- In the Available Itineraries Section, select the itinerary related to your trip
- Click **Assign**

<< Previous

Next >>



Assigned Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: ARPA-E Summit				
Philadelphia, Pennsylvania	05/22/2022 08:00 AM	Denver, Colorado	05/22/2022 11:00 AM	DENVER COUNTY, US-CO, US
Denver, Colorado	05/25/2022 08:00 AM	Philadelphia, Pennsylvania	05/25/2022 11:00 AM	PHILADELPHIA COUNTY, US-PA, US

Available Itineraries

Current Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
----------------	---------------	--------------	---------------	-----------------------

No Available Itineraries Found

Once your itinerary shows up in the Assigned Itineraries section, click **Next**

<< Previous **Next** >>



1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location ▾	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	05/22/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25
<input type="checkbox"/>	05/23/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$79.00
<input type="checkbox"/>	05/24/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$79.00
<input type="checkbox"/>	05/25/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25

First Travel Day

Last Travel Day

- Concur imports the GSA per diem rate for your destination
- Your first and last travel days will be calculated at 75% of the GSA rate
- Check the boxes to select meals that were provided for you, if applicable

<< Previous

Create Expenses

Cancel



Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	05/22/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25
<input type="checkbox"/>	05/23/2022 Denver, Colorado	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$23.00
<input checked="" type="checkbox"/>	05/24/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
<input checked="" type="checkbox"/>	05/25/2022 Denver, Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00

- Concur will deduct the breakdown for excluded meals, if applicable
- Click **Create Expense**



SAP Concur  Requests Travel **Expense** Administration | Help | Profile 

Manage Expenses Process Reports

ARPA-E Summit \$82.25

Not Submitted Copy Report Submit Report

Report Status  Print/Share  Manage Receipts  Travel Allowance 

Add Expense Edit Delete Copy Allocate Combine Expenses Move to  View: Standard 

<input type="checkbox"/>	Receipt 	Payment Type 	Expense Type 	Vendor Details 	Date 	Requested 
<input type="checkbox"/>		Out of Pocket	Meal Per Diem	Denver, Colorado	05/23/2022	\$23.00
<input type="checkbox"/>		Out of Pocket	Meal Per Diem	Denver, Colorado	05/22/2022	\$59.25
						\$82.25

Travel Policy Service Stat Contact Sup Cookie Pref

- Your per diem allowance entries have been added
- Click **Add Expense**

22:08:18 am
ts Reserved



Administration | Help

Profile

Manage Expenses Process

ARPA-E Summary

Not Submitted

Report Details Print/Share

Add Expense Edit

- Receipt Payment
- Out of Pocket

Copy Report Submit Report

View: Standard

Requested

					\$59.25
					\$79.00
					\$79.00
					\$59.25
					\$276.50

Add Expense

3 Available Expenses **+** Create New Expense

<input type="checkbox"/>	Payment T...	Expense T...	Vendor De...	Date	Amount
<input checked="" type="checkbox"/>	UD Credit Card	Car Rental	BUDGET RENT A CAR	07/03/2022	\$26.49
<input type="checkbox"/>	UD Credit Card	Lodging	THE LUMEN HOTEL Dallas, Texas	06/20/2022	\$-75.95
<input type="checkbox"/>	UD Credit Card	Lodging	THE LUMEN HOTEL Dallas, Texas	03/31/2022	\$75.95

Displayed expenses: 3, Total: 3

Close **Add To Report**

Travel Policy

Service Status (N

Contact Support

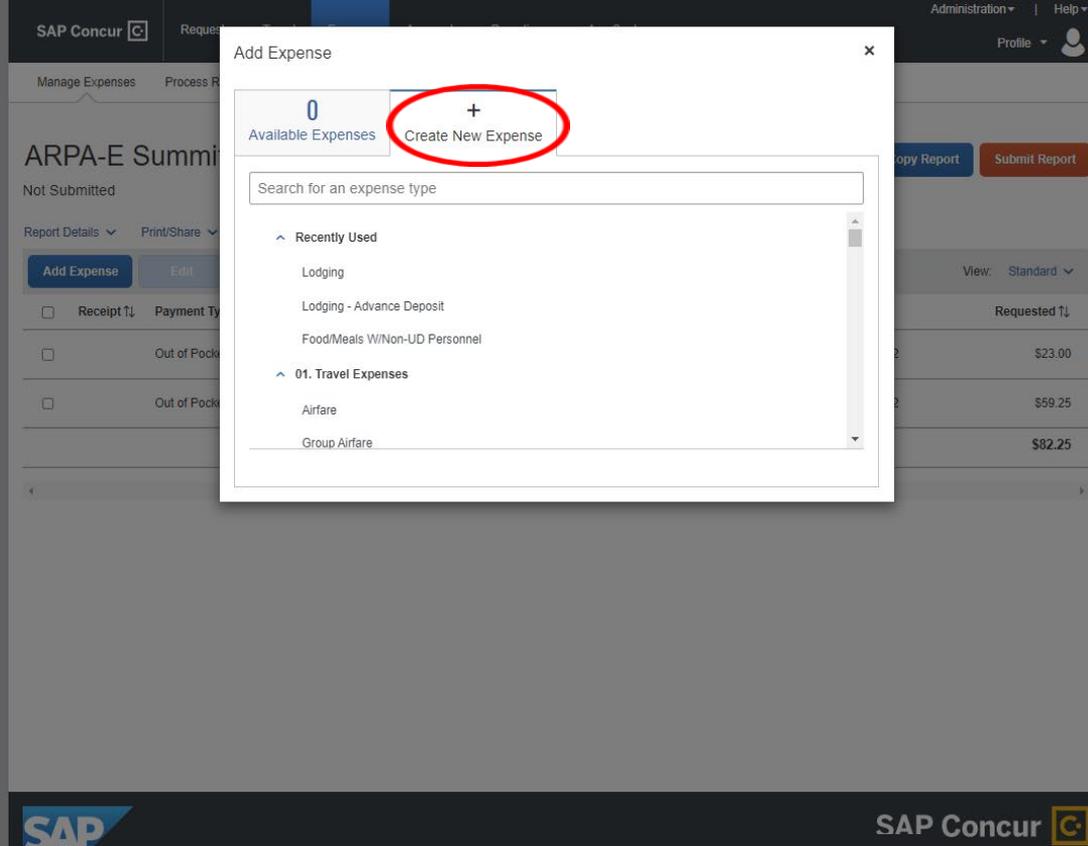
Cookie Preferences

07/2022 08:18 am

All Rights Reserved

Select all applicable charges and click **Add to Report**





- For Out of Pocket expenses (reimbursements), click **Create New Expense**
- Select the Expense Type



SAP Concur Administration Help Profile

Requests Travel Expense

Manage Expenses Process Reports

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

* Required field

Expense Type *
Lodging

Check-in Date * 05/22/2022
Check-out Date * 05/25/2022
Nights: 3

Transaction Date * 05/25/2022
Report/Trip Purpose *
Conference Professional Develop

Additional Information
New UI travel test
Vendor *
Marriott Hotels

Lodging Location *
Denver, Colorado
Payment Type *
Out of Pocket

Amount * 628.93
Currency *
US, Dollar

Travel Allowance

Comment

Save Expense Save and Add Another Cancel

Upload Receipt Image

For Lodging Expenses,
UNCHECK
the Travel Allowance box

Complete the required fields marked with a *



SAP Concur Administration | Help

Requests Travel Expense Profile

Manage Expenses Process Reports

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

* Required field

Expense Type *
Lodging

Check-in Date * 05/22/2022
Check-out Date * 05/25/2022
Nights: 3

Transaction Date * 05/25/2022
Report/Trip Purpose *
Conference Professional Develop

Additional Information
New UI travel test

Lodging Location *
Denver, Colorado

Amount *
628.93

Vendor *
Marriott Hotels

Payment Type *
Out of Pocket

Currency *
US, Dollar

Travel Allowance Travel Allowance

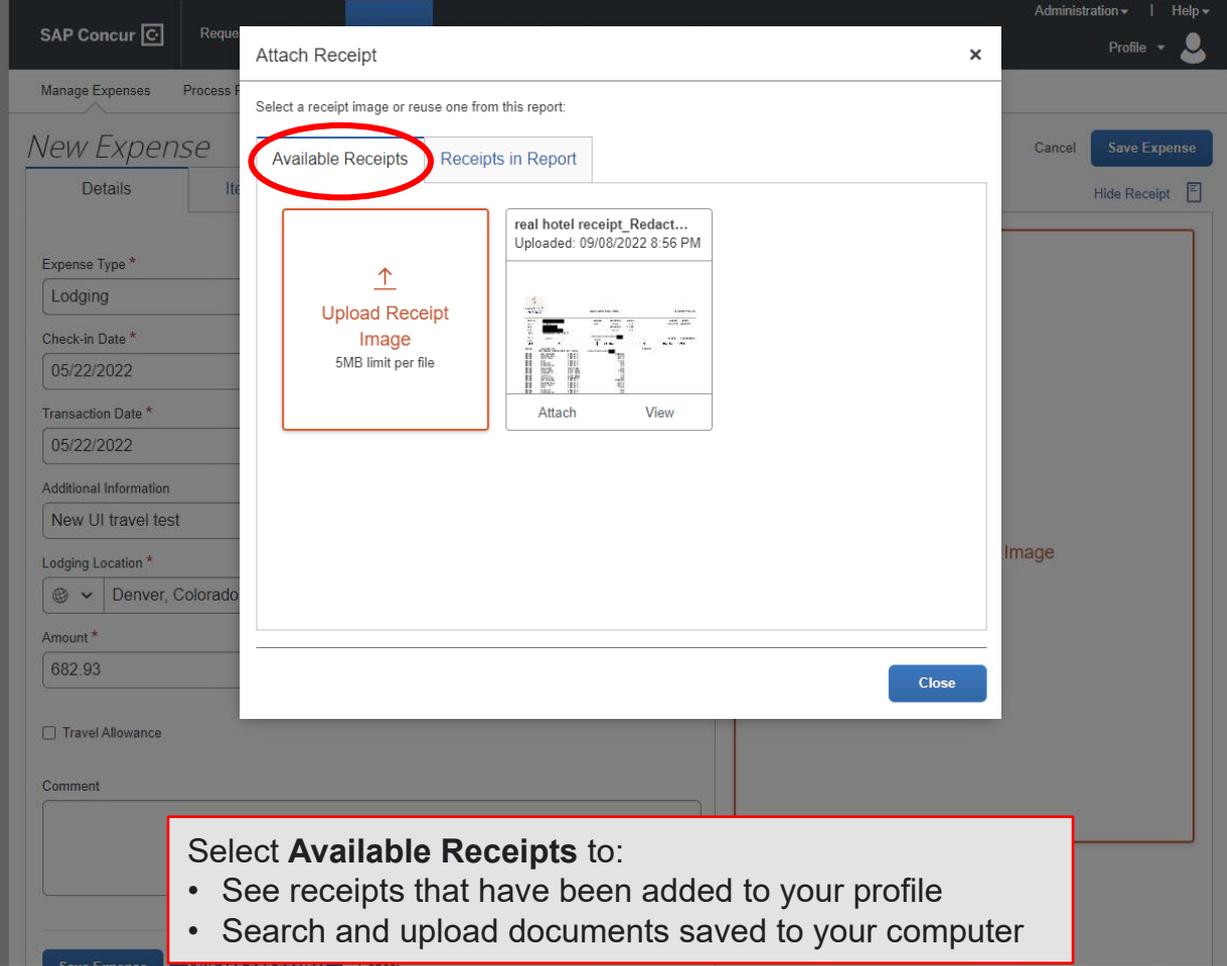
Comment

Upload Receipt Image

Save Expense

Click **Upload Receipt Image** to attach a receipt
(Required for all expenses \$25 or more)





Select **Available Receipts** to:

- See receipts that have been added to your profile
- Search and upload documents saved to your computer



SAP Concur Administration | Help Profile

Manage Expenses Process Receipts

New Expense

Details

Expense Type *
Lodging

Check-in Date *
05/22/2022

Transaction Date *
05/22/2022

Additional Information
New UI travel test

Lodging Location *
Denver, Colorado

Amount *
682.93

Travel Allowance

Comment

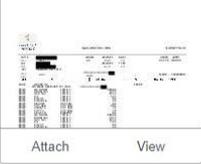
Cancel Save Expense Hide Receipt

Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts **Receipts in Report**

real hotel receipt_Redact...
Uploaded: 09/08/2022 8:56 PM



Attach View

Close

Select **Receipts in Report** to reuse a receipt in your current report





Manage Expenses

Process Reports

New Expense

Details

Itemizations

Cancel

Save Expense

Hide Receipt

Expense Type *

Lodging

* Required field

Check-in Date *

05/22/2022

Check-out Date *

05/25/2022

Nights:

3

Transaction Date *

05/22/2022

Report/Trip Purpose *

Conference Professional Develop

Additional Information

New UI travel test

Vendor *

Marriott Hotels

Lodging Location *

Denver, Colorado

Payment Type *

Out of Pocket

Amount *

682.93

Currency *

US, Dollar

 Travel Allowance

Comment

Save Expense

DATE	REFERENCES	CHARGES	CREDITS	BALANCES DUE
04/10	PAYMENT RECEIVED BY VISA	XXXXXXXXXXXX	325.85	
05/22	ROCKIES	289.00		
05/23	ROCKIES	212.12		
05/24	ROCKIES	181.81		
05/25	ROCKIES	100.00		
05/26	ROCKIES	0.00		
05/27	ROCKIES	0.00		
05/28	ROCKIES	0.00		
05/29	ROCKIES	0.00		
05/30	ROCKIES	0.00		
05/31	ROCKIES	0.00		
06/01	ROCKIES	0.00		
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12/29	ROCKIES	0.00		
12/30	ROCKIES	0.00		
12/31	ROCKIES	0.00		

Click the **Itemizations** tab to itemize the expense



Alerts: 1
Itemizations are required for this entry. View

Lodging \$682.93
05/22/2022 | Marriott Hotels

Cancel Save Itemization

Details Itemizations Hide Receipt

Amount \$682.93 Itemized \$0.00 Remaining \$682.93

New Itemization
Expense Type *
Lodging

Entry Type: Recurring Itemization 05/22/2022 - 05/25/2022 (Nights: 3)

Your hotel room rate has:

The Same Every Night Not the Same

Date	Room Rate	Room Tax	Tax 2	Tax 3
05/22/2022	0.00	0.00	0.00	10.41
05/23/2022	289.00	13.73	23.12	10.41
05/24/2022	289.00	13.73	23.12	10.41

(Amounts in USD)

Save Itemization Cancel

- Select the appropriate itemization format and enter the information
- Click **Save Itemization**





Lodging \$682.93

05/22/2022 | Marriott Hotels

Cancel

Save Expense

Details

Itemizations

Hide Receipt

Amount

\$682.93

Itemized

\$682.93

Remaining

\$0.00

Create Itemization

More Actions

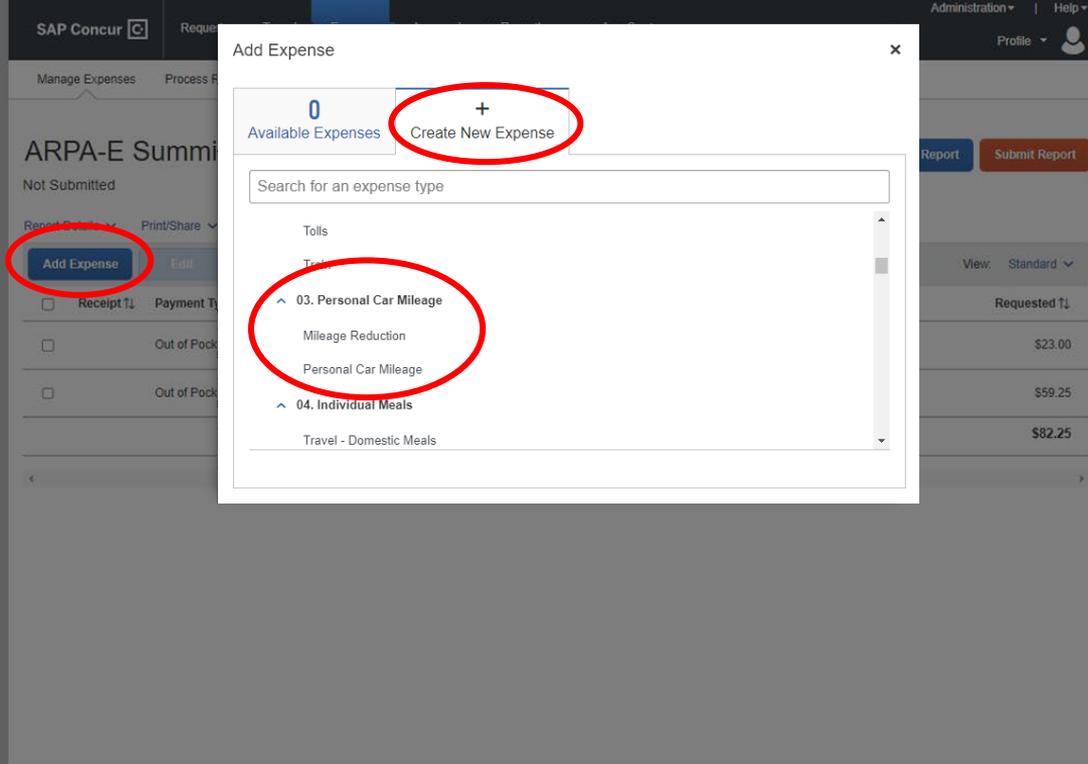
<input type="checkbox"/>	Date	Expense Type	Requested
<input type="checkbox"/>	05/22/2022	Lodging	\$0.00
<input type="checkbox"/>	05/22/2022	Lodging Tax	\$10.41
<input type="checkbox"/>	05/23/2022	Lodging	\$289.00
<input type="checkbox"/>	05/23/2022	Lodging Tax	\$47.26
<input type="checkbox"/>	05/24/2022	Lodging	\$289.00
<input type="checkbox"/>	05/24/2022	Lodging Tax	\$47.26

real hotel receipt_Redacted...

Append

Once the full amount has been itemized,
click **Save Expense**





To create a personal car mileage expense:

- Click **Add Expense**
- Click **Create New Expense**
- Select **Personal Car Mileage**





Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

222 S Chapel Street, Newark, DE 19711

8000 Essington Ave, Philadelphia, PA 19151

36.5 MI Personal

Directions

A 222 S Chapel St, Newark, DE 19716, USA

36.6 mi. About 47 mins

1. Head north on S Chapel St toward Wyoming Rd 335 ft
2. Turn right onto Wyoming Rd 0.4 mi
3. Turn left onto Library Ave 0.4 mi
4. Turn right onto DE-273 E/Ogletown Rd Continue to follow DE-273 E 3.4 mi
5. Slight right to merge onto I-95 N toward Del 4.4 mi

Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	36.5 MI

Concur will launch a Google Maps mileage calculator

- Enter your start and end points
- Click **Calculate Route**
- Click **Add Mileage to Expense**



Manage Expenses

Process Reports

New Expense

Cancel

Save Expense

Details

Itemizations

Show Receipt

Mileage Calculator * | Allocate

Expense Type *

Personal Car Mileage

Transaction Date *

05/22/2022

Report/Trip Purpose *

Conference Professional D...

Additional Information

From Location

To Location

Payment Type

222 S Chapel Street, Newark, ...

8000 Essington Ave, Philadelph...

Out of Pocket

Comment

Distance *

37

Amount

21.65

Currency

US, Dollar

Reimbursement Rates

USD 0.585 per mile

Save Expense

Save and Add Another

Cancel

Concur will bring you to the New Expense details tab

- Complete any required information fields marked with a *
- Click **Save Expense**

SAP Concur | Administration | Help

Requests Travel Expense Approvals Reporting App Center

Manage Expenses Process Reports

New Expense

Cancel Save Expense

Details Itemizations Hide Receipt

Allocate

* Required field

Expense Type *
Professional Development

Transaction Date *
05/24/2022

Report/Trip Purpose *
Conference Professional Develop

Additional Information
New UI test

Enter Vendor Name
Example Industries Inc

City of Purchase
Newark, Delaware

Payment Type *
Out of Pocket

Amount *
100.00

Currency *
US, Dollar

Comment

Upload Receipt Image

- To allocate an expense to different Speedtypes/Purpose Codes than the one on your Report Header:
- Select the expense to open the Expense Detail screen
 - Click **Allocate**



Allocate



Expenses: 1 | \$100.00

Percent

Amount

Amount
\$100.00Allocated \$100.00
100%Remaining \$0.00
0%

Default Allocation

Code
PURC110000Percent %
100

Add

Edit

Remove

Save as Favorite

No Allocations

This expense is assigned to your default allocation shown above. Click the allocate button to allocate part or all of this expense differently.

Cancel

Save

- Select allocation calculation (*Percent* or *Amount*)
- Click **Add**



Add Allocation

+ New Allocation ★ Favorite Allocations

* Required field

Speedtype

Project ID

UD User Field

Work Order #

Cancel

- Select the Speedtype
- Click **Save**



Allocate ✕

Expenses: 1 | \$100.00 | [View Allocation Group](#)

Percent	Amount
Amount \$100.00	Allocated \$100.00 100%
	Remaining \$0.00 0%

Default Allocation

Code: PURC110000 Percent %
50

[Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

<input type="checkbox"/>	Speedtype ↑↓	Project ID ↑↓	UD User Field ↑↓	Work Order # ↑↓	Code ≡	Percent %
<input type="checkbox"/>	1743 LLC PROCARD CLEARING				ABCD112112	<input type="text" value="50"/>

- Enter the percentage or amount you would like to allocate
(If you would like to use this allocation split in the future, click **Save as Favorite**)
- Click **Save**

[Cancel](#) [Save](#)



ARPA-E Summit \$82.25 

Copy Report

Submit Report

Not Submitted

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

View: Standard

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>		Out of Pocket	Meal Per Diem	Denver, Colorado	05/23/2022	\$23.00
<input type="checkbox"/>		Out of Pocket	Meal Per Diem	Denver, Colorado	05/22/2022	\$59.25
						\$82.25

SAP Concur 

Travel Policy

Service Status (Nor

Contact Support

Cookie Preferences

Once everything is complete, click **Submit Report**

Resources

[Procurement Services](#)
procurement@udel.edu

