Concur Travel and Expense Management

Travel Expense Report Basics
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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
- From the Requests tab, select the approved Travel Request
- Click Create Expense Report
• Calculate your Travel Allowance (per diem) by selecting Yes
• Click Next
If your Itinerary Rows do not appear in the Itinerary Info box, click **Available Itineraries**
• In the Available Itineraries Section, select the itinerary related to your trip
• Click **Assign**
Once your itinerary shows up in the Assigned Itineraries section, click **Next**
• 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
<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Breakfast Provided</th>
<th>Lunch Provided</th>
<th>Dinner Provided</th>
<th>Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/22/2022</td>
<td>Denver, Colorado</td>
<td>☑</td>
<td></td>
<td></td>
<td>$59.25</td>
</tr>
<tr>
<td>09/23/2022</td>
<td>Denver, Colorado</td>
<td></td>
<td>☑</td>
<td>☑</td>
<td>$23.00</td>
</tr>
<tr>
<td>09/24/2022</td>
<td>Denver, Colorado</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>09/25/2022</td>
<td>Denver, Colorado</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

- Concur will deduct the breakdown for excluded meals, if applicable
- Click **Create Expense**
• Your per diem allowance entries have been added
• Click Add Expense
Select all applicable charges and click Add to Report
- For Out of Pocket expenses (reimbursements), click **Create New Expense**
- Select the Expense Type
For Lodging Expenses, **UNCHECK** the Travel Allowance box.

Complete the required fields marked with a *
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
Select **Receipts in Report** to reuse a receipt in your current report
Click the **Itemizations** tab to itemize the expense.
Click Create Itemization
• Select the appropriate itemization format and enter the information
• Click Save Itemization
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
Concur will launch a Google Maps mileage calculator

- Enter your start and end points
- Click **Calculate Route**
- Click **Add Mileage to Expense**
Concur will bring you to the New Expense details tab

- Complete any required information fields marked with a *
- Click **Save Expense**
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
• Select allocation calculation (Percent or Amount)
• Click Add
- Select the Speedtype
- Click Save
• 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**
Once everything is complete, click **Submit Report**
Resources

Procurement Services
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