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
- 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
### Allocate

**Expenses:** 1  |  $100.00

- **Amount**
  - **Percent**
  - **Amount**

<table>
<thead>
<tr>
<th>Code</th>
<th>Amount</th>
<th>Allocated</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBC110000</td>
<td>$100.00</td>
<td>$100.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Default Allocation**

- **Percent:**
  - **100%**

**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.

- **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

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