

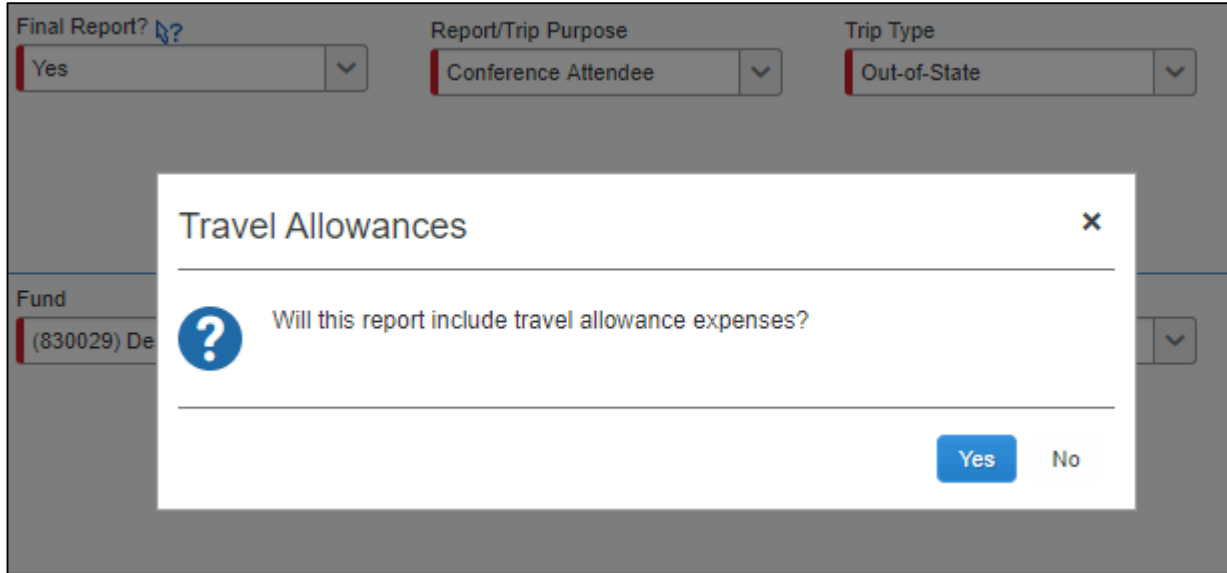
Concur Expense

Travel Allowance (per diem meals)

Concur Expense Travel Allowances

- This training will provide process steps and resources necessary to add Travel Allowance Meals (per diem) to an Expense Report in Concur
 - Create an Itinerary Row for the first day of travel
 - Create an Itinerary Row for the last day of travel
 - Select meals provided by the conference or not being claimed
 - Add expenses to your Expense Report

Adding Travel Allowances



The screenshot shows a web-based expense report form. At the top, there are three dropdown menus: 'Final Report?' set to 'Yes', 'Report/Trip Purpose' set to 'Conference Attendee', and 'Trip Type' set to 'Out-of-State'. Below these, a 'Fund' dropdown is partially visible, showing '(830029) De'. A white pop-up dialog box titled 'Travel Allowances' is centered on the screen. It contains a question mark icon and the text 'Will this report include travel allowance expenses?'. At the bottom of the dialog, there are two buttons: 'Yes' (highlighted in blue) and 'No'.

There are **two** ways to access the Travel Allowance section of the Expense Report.

The first way to access Travel Allowances is after completing the Expense Report Header. A pop-up box will appear asking if the report will include travel allowance expenses.

If reimbursement includes meals or lodging utilizing the GSA per diem rates, then select yes to begin the process to determine total meal reimbursement. If reimbursement includes actual receipts, select Cancel.

Travel Allowances

The screenshot shows the 'ABC Conference' interface. At the top, there are buttons for '+ New Expense', 'Import Expenses', 'Details', 'Receipts', and 'Print'. A yellow arrow points to the 'Details' button. Below this, a dropdown menu is open, listing various report sections: 'Report' (with sub-items: Report Header, Totals, Audit Trail, Approval Flow, Comments), 'Allocations' (with sub-item: Allocations), and 'Travel Allowances' (with sub-items: New Itinerary, Available Itineraries, Expenses & Adjustments, Reimbursable Allowances Summary). A yellow arrow points to 'New Itinerary'. The main content area shows an 'Exceptions' table with one row containing 'N/A', and an 'Expenses' table with a header row and a row labeled 'Adding New Expense'. Below the expenses table, it says 'No Expenses Found'.

There are **two** ways to access the Travel Allowance section of the Expense Report.

The second way to access Travel Allowances is from the Expense screen. Select Details > Travel Allowances “New Itinerary” to begin the process to determine total meal reimbursement.

Travel Allowances

Travel Allowances For Report: ABC Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: ABC Conference Selection: Per Diem

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Departure City: Denton, Texas

Date: 09/01/2019 Time: 7:00 AM

Arrival City: Austin, Texas

Date: 09/01/2019 Time: 11:00 AM

Save

Go to Single Day Itineraries Next >> Cancel

The Travel Allowances has 2 parts – Itinerary creation, and Expenses & Adjustments. If an Itinerary has already been created, it will be listed on the Available Itineraries page. Start with Create New Itinerary

In this example, the traveler is leaving from Denton to attend a conference in Austin. Leaving at 7 am, arriving at 11 am on the same day 09/01/19

1. Enter **first day of Travel** and select **Save**.

Travel Allowances

Travel Allowances For Report: ABC Conference

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: ABC Conference Selection: Per Diem

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Denton, Texas 09/01/2019 07:00 AM	Austin, Texas 09/01/2019 11:00 AM	TRAVIS COUNTY, US-TX, US

New Itinerary Stop

Departure City: Austin, Texas

Date: 09/06/2019 Time: 1:00 PM

Arrival City: Denton, Texas

Date: 09/06/2019 Time: 4:00 PM

Save

Go to Single Day Itineraries Next >> Cancel

Note that the departure date is now listed on the left hand side

2. Enter the **last date of travel** (or return date) and select **Save**.

Travel Allowances

Travel Allowances For Report: ABC Conference

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments ←

Itinerary Info

Itinerary Name: ABC Conference Selection: Per Diem

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City ▲	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Denton, Texas 09/01/2019 07:00 AM	Austin, Texas 09/01/2019 11:00 AM	TRAVIS COUNTY, US-TX, US
<input type="checkbox"/>	Austin, Texas 09/06/2019 01:00 PM	Denton, Texas 09/06/2019 04:00 PM	DENTON COUNTY, US-TX,...

↑

New Itinerary Stop

Departure City: Denton, Texas

Date: [] Time: []

Arrival City: []

Date: [] Time: []

Save

Go to Single Day Itineraries Next >> Cancel

Verify the appropriate travel dates have been documented.

If additional travel details are required (multi-leg trip), select Add Stop to add additional details and expenditures.

If complete, select 3. Expenses & Adjustments

Travel Allowances

Travel Allowances For Report: ABC Conference

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ▲	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/01/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$45.75
<input type="checkbox"/>	09/02/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$61.00
<input type="checkbox"/>	09/03/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$61.00
<input type="checkbox"/>	09/04/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$61.00
<input type="checkbox"/>	09/05/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$35.00
<input type="checkbox"/>	09/06/2019 Austin, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$45.75

Update Expenses Cancel

From the information selected on the previous step, Concur provides a list of the Travel Allowances by day.

In this example, the traveler is attending a conference that provides dinner on 09/05/19. Select this meal as being provided by the conference, and therefore not allowable for reimbursement. Concur will recalculate allowable expenses due to traveler by automatically deducting Per Diem rates for these meals from the daily Per Diem amounts due according to the GSA rate.

Select Create Expenses.

Travel Allowances

Concur automatically calculates the Daily meal Allowance based on the GSA Per Diem Rates and adds those expenses to the Expense Report.

Manage Expenses View Transactions Process Reports

ABC Conference

Delete Report Submit Report

+ New Expense Import Expenses Details Receipts Print Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			⚠ REMINDER: PLEASE ATTACH THE CONFERENCE AGENDA TO THIS EXPENSE REPORT UNDER RECEIPTS. IF NOT LISTED IN AGENDA, PLEASE MAKE A COMMENT FOR ANY MEALS THAT WERE PROVIDED AS PART OF THE CONFERENCE REGISTRATION FEE.

Expenses

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	09/06/2019	Daily Allowance Austin, Texas	\$45.75	\$45.75
<input type="checkbox"/>	09/05/2019	Daily Allowance Austin, Texas	\$35.00	\$35.00
<input type="checkbox"/>	09/04/2019	Daily Allowance Austin, Texas	\$61.00	\$61.00
<input type="checkbox"/>	09/03/2019	Daily Allowance Austin, Texas	\$61.00	\$61.00
<input type="checkbox"/>	09/02/2019	Daily Allowance Austin, Texas	\$61.00	\$61.00
<input type="checkbox"/>	09/01/2019	Registration - Conference ABC Conference, Austin, Texas	\$250.00	\$250.00
<input type="checkbox"/>	09/01/2019	Daily Allowance Austin, Texas	\$45.75	\$45.75

TOTAL AMOUNT **\$559.50** TOTAL REQUESTED **\$559.50**

New Expense Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Registration - Conference
- Dinner
- Fuel
- Tolls/Road Charges
- Personal Car Mileage

All Expense Types

- 01. Lodging
 - Group Hotel
 - Hotel
- 02. Transportation
 - Airfare
 - Airline Fees
 - Car Rental
- ...07. Communications
 - Mobile/Cellular Fees
 - Telephone/Fax
- 08. Fees
 - Booking Fees
 - Continuing Education Fees
 - Entry Fee

Thank You

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Concur System Status Updates

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CTP Free Online Help for
Concur Travel Booking Tool

877-727-5188