

Managing Per Diem for Concur Expense Reports

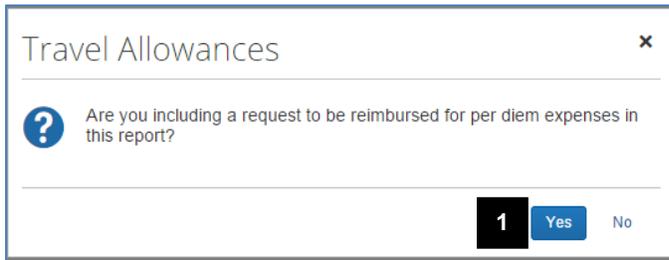
Description

This job aid describes how to include per diem when creating a new Concur expense report.

Navigation

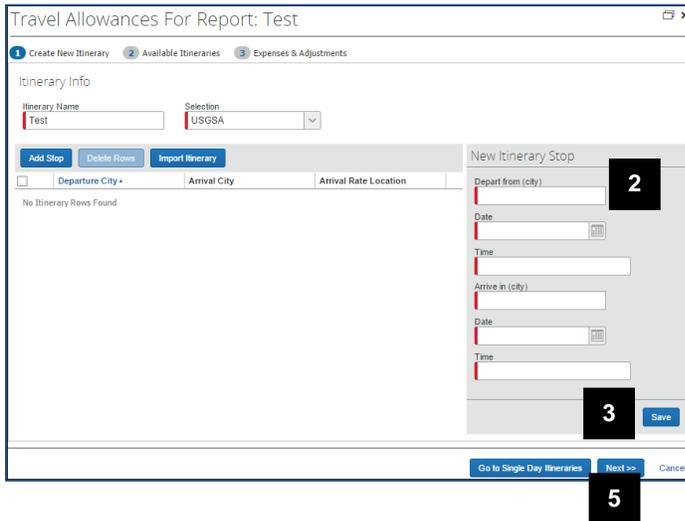
Concur > Expense > Create New Expense Report

Once the Report Header information has been completed with a Report Name, Business Purpose, etc. and the **Next >>** button has been clicked, the **Travel Allowances** alert box, shown below, will appear.



1. Click

Travel Allowances Pane – Create New Itinerary



Concur displays a list of matching values as you enter a value in a search field (e.g., Depart from). Select the applicable value from this list.

Note: Concur may not list every available location. If necessary, select the closest city to your departure/arrival location.

To manually enter an itinerary:

2. Complete the **New Itinerary Stop** pane for each leg of your departure flight as follows:
 - Begin typing the name of the **Depart from (city)**, then select the applicable location from the drop-down list.
 - Select the *departure Date* from the calendar.
 - Type the *departure Time*.
 - Begin typing the name of the **Arrive in (city)**, then select the appropriate location from the drop down list.
 - Select the *arrival Date* from the calendar.
 - Type in the *arrival Time*.
3. Click **Save**.
4. Repeat steps 3 – 4 for each leg of your return flight (not shown).
5. Click **Next** to go to the Available Itineraries page.

Your itinerary is for business-related travel only. If your trip included personal travel prior to/after the business travel, adjust the departure and arrival dates for the itinerary to exclude the personal travel.

To manually enter an itinerary:

6. Click **Go to Single Day Itineraries**.

7. Select the Start Date from the calendar.

8. Click **Go**.

Note: Dates will display a week at a time.

9. Complete all fields as follows:

- Type in the **Start Location**.
- Type in the **Depart** time.
- Type in the **End Location**.
- Type in the **Arrive** time.
- Type in the **Depart** time from the End Location.
- Type in the **Back at Origin** time.

10. Repeat step 9 for each single day trip (not shown).

11. Click **Save Itineraries**.

12. Click **Next**.

Travel Allowances Pane – Available Itineraries

13. Click **Next** to assign the itinerary you just created or imported to the expense report.

Note: To assign multiple itineraries to the report, use the options in the **Available Itineraries** list.

- You cannot have multiple itineraries with the same date range in Concur.

Travel Allowances Pane – Expenses & Adjustments

Exclude All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	11/03/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25
<input type="checkbox"/>	11/04/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	11/05/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.25

14. Review the per diem expense for each day.

15. If applicable, click the pertinent **Breakfast-**, **Lunch-**, or **Dinner Provided** checkboxes.

Note: Clicking a **Provided** checkbox reduces the per diem rate based on the meal selected and ensures you are not reimbursed for travel meals twice.

- Days on which travel occurs automatically have a reduced per diem rate per the GSA.

16. Click **Create Expenses**.

Expense Report – Expenses Pane

Date	Expense	Amount	Requested
11/05/2014	Fixed Meals (623528 or 623642) Chicago, Illinois	\$23.25	\$23.25
11/04/2014	Fixed Meals (623528 or 623642) Chicago, Illinois	\$5.00	\$5.00
11/03/2014	Fixed Meals (623528 or 623642) Chicago, Illinois	\$17.25	\$17.25

17. Verify that imported per diem expenses (Fixed Meals) appear in the **Expenses** list.

 If you forget to include travel allowances as you are beginning your expense report (i.e., clicked “No” instead of “Yes” to the Travel Allowance question) use the following steps to add the itinerary and adjust the travel allowances, as applicable:

1. Select **New Itinerary** from the **Details** menu on the **Expense Report** page.
2. Using the **Create New Itinerary** pane, build the itinerary for all stops within the trip.
3. Click on the **Expense Adjustments** tab to exclude any provided meals from the daily per diem.
4. Click the **Update Expenses** button to add the per diem expenses to the expense report.