

Local Transportation

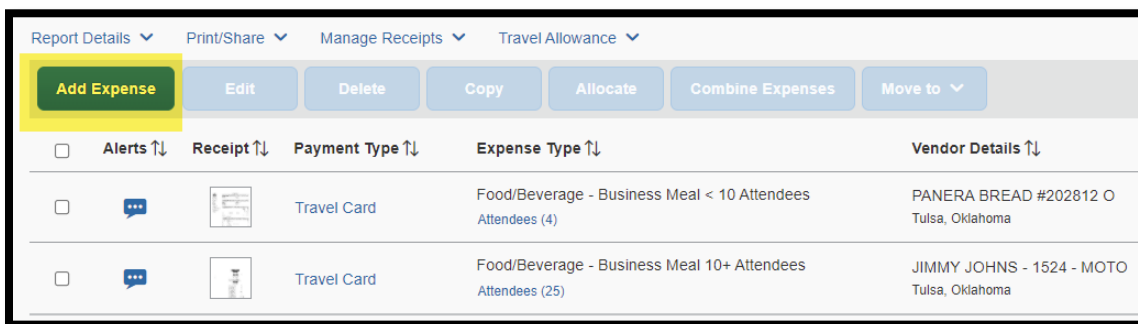
Local Transportation is classified as an expense for local ground transportation such as taxi, Uber, Lyft, shuttle, bus, subway, etc. Note that **Local Transportation** expenses are only allowable for business travel. Travel expenses incurred for personal events or personal meals are not allowable. Please use this guide to appropriately expense **Local Transportation**.

Accessing Concur

1. Go to **Travel.ou.edu** and login with your 4x4 or username.
2. Click **Expense** from the main menu and either select **+ Create New Report** or access an open report by clicking on the **report name**.
3. For more information on how to complete the report header, see the **Report Header** job aid.

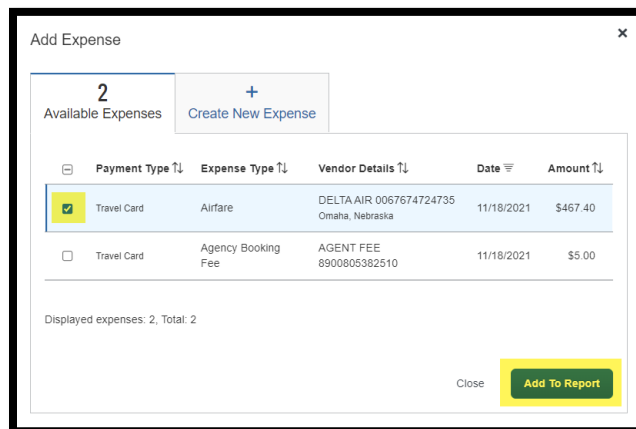
Travel Card Charges

4. To expense a Travel Card charge, select **Add Expense**.



<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓
<input type="checkbox"/>			Travel Card	Food/Beverage - Business Meal < 10 Attendees Attendees (4)	PANERA BREAD #202812 O Tulsa, Oklahoma
<input type="checkbox"/>			Travel Card	Food/Beverage - Business Meal 10+ Attendees Attendees (25)	JIMMY JOHNS - 1524 - MOTO Tulsa, Oklahoma

5. The available card charges will appear under the **Available Expenses** tab in the pop-up window.
6. Click the **box** to the left of the transaction and click **Add To Report** to pull the charge over to the expense report.



<input type="checkbox"/>	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Amount ↑↓
<input checked="" type="checkbox"/>	Travel Card	Airfare	DELTA AIR 0067674724735 Omaha, Nebraska	11/18/2021	\$467.40
<input type="checkbox"/>	Travel Card	Agency Booking Fee	AGENT FEE 8900805382510	11/18/2021	\$5.00

Displayed expenses: 2, Total: 2

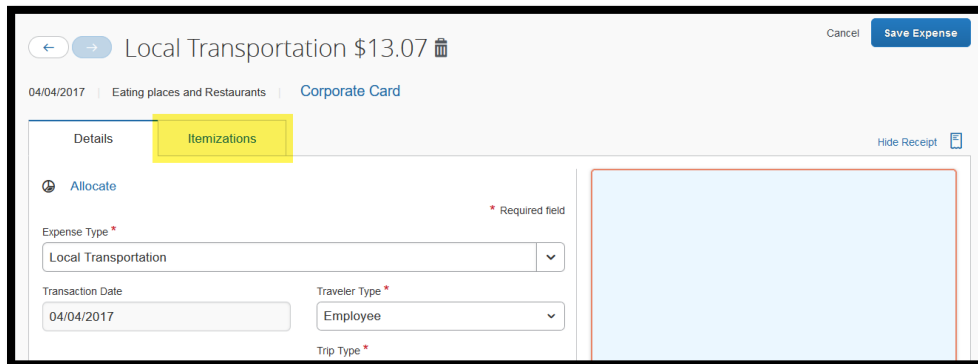
Close **Add To Report**

Local Transportation

7. Click on the transaction.
8. If the transaction does not default to the correct expense type, use the drop-down menu under **Expense Type** to select **Local Transportation**.
9. Ensure that the **Traveler Type**, **Trip Type**, **Report/Trip Purpose**, **Event Name/Nature of Business** and **City** fields all fill down appropriately from the report header as these are required entries.
10. Enter in the amount of the fare, including any additional surcharges imposed by the vendor, in the **Fare** field.
11. Enter in the amount of the tip in the **Tip** field. Please note that OU Policy limits tips to a maximum of 20% of the fare unless the fare is less than \$5 and then a \$1 tip is allowable. If the tip amount paid is greater than allowable, the overage amount must be entered as **Personal/Non Reimbursable**. See the section below for information on how to enter the overage amount.
12. Enter in the valid business travel locations in the **To/From** field. Example: Hotel/Airport.
13. Additional information may also be entered in the available fields.

Personal/Non-Reimbursable

14. If the **Tip** amount is greater than 20% on a Travel Card charge, an alert will appear noting that the overage amount must be coded as **Personal/Non-Reimbursable**.
15. Click **Itemizations** at the top of the expense.



The screenshot shows a mobile application interface for entering an expense. At the top, it says "Local Transportation \$13.07" with a trash icon. Below that, it shows the date "04/04/2017", the category "Eating places and Restaurants", and the payment method "Corporate Card". There are two tabs: "Details" and "Itemizations", with "Itemizations" highlighted in yellow. On the right side, there are buttons for "Cancel" and "Save Expense", and a "Hide Receipt" link. The form fields include: "Expense Type" (dropdown menu with "Local Transportation" selected), "Transaction Date" (text field with "04/04/2017"), "Traveler Type" (dropdown menu with "Employee" selected), and "Trip Type" (dropdown menu). A red asterisk indicates that "Expense Type", "Traveler Type", and "Trip Type" are required fields. There is also an "Allocate" button with a plus icon.

16. On the **Itemizations** tab, click **Create Itemization**.

Local Transportation

Local Transportation \$13.07

04/04/2017 | Eating places and Restaurants | Corporate Card

Details | Itemizations | Hide Receipt

Amount \$13.07	Itemized \$0.00	Remaining \$13.07
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Create Itemization | More Actions

No Itemizations.
Create itemizations for the items on your receipt.

- The Expense Type drop-down will appear and **Local Transportation** should be selected.
- When **Local Transportation** is itemized, only the allowable amount of **Fare** and **Tip** should be added to the **Amount** field.
- Click **Save Itemization** but note that the expense needs to be itemized further.
- Concur will display the remaining amount to **Itemize**.

Local Transportation \$13.07

04/04/2017 | Eating places and Restaurants | Corporate Card

Details | Itemizations | Hide Receipt

Amount \$13.07	Itemized \$10.00	Remaining \$3.07
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Create Itemization | More Actions

<input type="checkbox"/>	Alerts	Date	Expense Type	Requested
<input type="checkbox"/>	!	04/04/2017	Local Transportation	\$10.00

- Click **Create Itemization** again, select the **Personal/Non-Reimbursable** expense type from the drop-down menu and fill in the required fields.

Local Transportation \$13.07

04/04/2017 | Eating places and Restaurants | Corporate Card

Details | Itemizations | Hide Receipt

Amount \$13.07	Itemized \$10.00	Remaining \$3.07
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Create Itemization | More Actions

New Itemization

Expense Type * * Required field
Personal/Non Reimbursable

Transaction Date *
04/04/2017

Amount *
3.07

Currency
US, Dollar

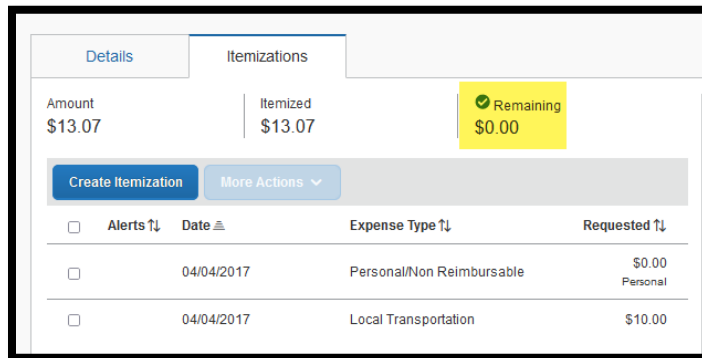
Comment

Save Itemization | Cancel

Upload Receipt Image

Local Transportation

22. Click **Save Itemization** again and ensure that there is no remaining amount to be itemized.



Alerts	Date	Expense Type	Requested
<input type="checkbox"/>	04/04/2017	Personal/Non Reimbursable	\$0.00 Personal
<input type="checkbox"/>	04/04/2017	Local Transportation	\$10.00

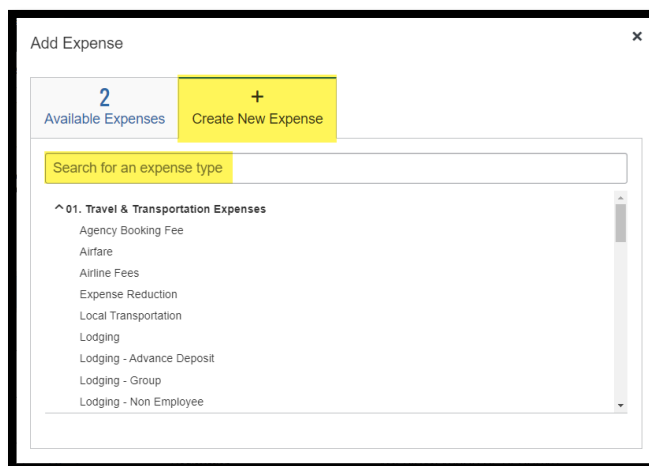
Cash/Out of Pocket Charges

23. To expense a Cash/Out of Pocket charge, click **Add Expense**.



Alerts	Receipt	Payment Type	Expense Type	Vendor Details
<input type="checkbox"/>		Travel Card	Food/Beverage - Business Meal < 10 Attendees Attendees (4)	PANERA BREAD #202812 O Tulsa, Oklahoma
<input type="checkbox"/>		Travel Card	Food/Beverage - Business Meal 10+ Attendees Attendees (25)	JIMMY JOHNS - 1524 - MOTO Tulsa, Oklahoma

24. Select the **+ Create New Expense** tab in the pop-up window.



2 Available Expenses

Search for an expense type

01. Travel & Transportation Expenses

- Agency Booking Fee
- Airfare
- Airline Fees
- Expense Reduction
- Local Transportation
- Lodging
- Lodging - Advance Deposit
- Lodging - Group
- Lodging - Non Employee


25. Either type in **Local Transportation** in the **Expense Type** search bar or scroll through the list of expense types and select **Local Transportation**.

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26. Enter in the **Transaction Date** by using the **calendar** option or type in the date using the format of **MM/DD/YYYY**. The date used should be the transaction date noted on the receipt.
27. Enter the city of purchase in the **City** field.
28. Enter in the amount of the fare, including any additional surcharges imposed by the vendor, in the **Fare** field.
29. Enter in the amount of the tip in the **Tip** field. Please note that OU Policy limits tips to a maximum of 20% of the fare unless the fare is less than \$5 and then a \$1 tip is allowable. If the tip amount paid is greater than allowable, only the allowable portion of the tip amount paid can be reimbursed. Please reduce the tip amount to the allowable limit.
30. Enter in the valid business travel locations in the **To/From** field. Example: Hotel/Airport.
31. Change the **Payment Type** to **Cash/Out of Pocket**.
32. Enter the amount in the **Amount** field. Note that the amount will default to US Dollars (USD). Do not enter in commas or dollar signs in this field.

Receipts

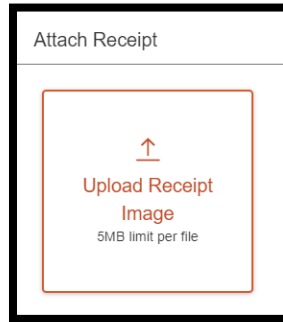
33. Charges for **Local Transportation** in excess of \$25.00 will require a receipt. To satisfy the receipt requirement if the vendor did not provide an e-Receipt, this is a Cash/Out of Pocket expense or there is a more detailed receipt to add to the expense line, add the receipt by selecting **Attach Receipt Image** to the right of the expense. Note that if the receipt field is not present, click on the **Show Receipt** hyperlink at the top right of the screen.



The screenshot shows a web interface for creating a new expense. At the top left, it says "New Expense". There are two tabs: "Details" (selected) and "Itemizations". On the right side, there are buttons for "Cancel" and "Save Expense". Below these, there is a yellow button labeled "Show Receipt" with a document icon. At the bottom left, there is an "Allocate" button with a circular icon. At the bottom right, there is a note: "* Required field".

34. A pop-up box will appear and you can click **Upload Receipt Image** to locate the receipt saved on a local device or, if the receipt image was uploaded previously, the receipt will be available to select.

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35. Click on the correct **receipt** and click **Attach**.
36. The receipt image will appear to the right of the screen. Click **Save Expense** at the top right or bottom left of the screen.

Additional Information

37. Please note that if **Local Transportation** expenses in excess of the tipping maximum are submitted on an expense report without reducing the tip amount appropriately, the expense report will be returned for correction. When an expense report is returned, all approvals for the expense report must be obtained again.