

## Train

**Train** is classified as the expense for passenger rail transportation in lieu of airfare. Note that a Comparable Airfare Quote is required to justify the cost of using a **Train** for out of state travel instead of flying to ensure that a **Train** is the most economical travel option. Commuter train expenses in lieu of local transportation such as a taxi, shuttle, bus, etc. are classified as local transportation. Please use this guide to appropriately expense **Train** charges.

### 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.

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2 Available Expenses + Create New Expense

<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

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 **Train**.
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. Additional information may also be entered in the available fields.

### Cash/Out of Pocket Charges

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

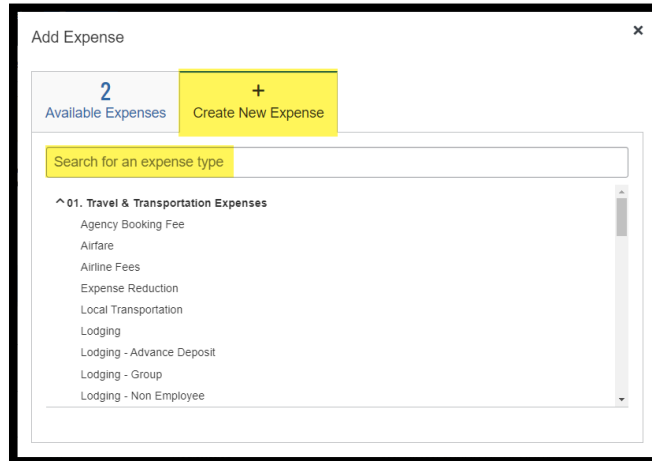
Report Details Print/Share Manage Receipts Travel Allowance

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<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

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

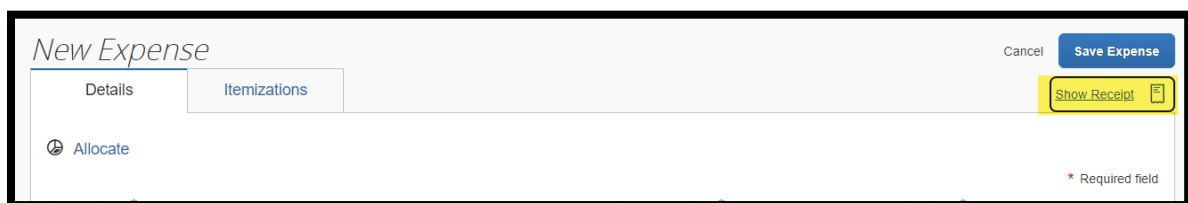
## Train



13. Either type in **Train** in the **Expense Type** search or scroll through the list of expense types and select **Train**.
14. 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.
15. Enter the city of purchase in the **City** field.
16. Change the **Payment Type** to **Cash/Out of Pocket**.
17. 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.

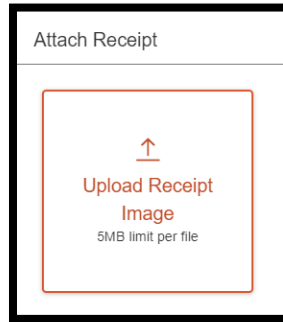
### Receipts

18. All charges for **Train** 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.



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