Training

Training is classified as an expense to receive instruction related to business. Training can only be paid for when it is deemed necessary by the department for business. Please use this guide to appropriately expense Training.

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.

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.

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 **Training**.

9. Ensure that the **Traveler Type, Trip Type, Report/Trip Purpose**, and **Event Name/Nature of Business** 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**.

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

13. Either type in **Training** in the **Expense Type** search bar or scroll though the list of expense types and select **Training**.

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. Change the **Payment Type** to **Cash/Out of Pocket**.
16. Enter the amount being requested for reimbursement 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**

17. All charges for a **Training** 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.

![New Expense](image)

18. 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.

![Attach Receipt](image)

19. Click on the correct **receipt** and click **Attach**.

20. The receipt image will appear to the right of the screen. Click **Save Expense** at the top right or bottom left of the screen.