

## Creating per diem for meal reimbursement on a Concur expense report.

For any Conference related travel a conference schedule or schedule at-a-glance is required. Attach this to one of Fixed Meal expenses as a receipt.

There are two ways to access the Travel Allowance option.

When first creating an expense report at the bottom of the Report Header there is a Yes or No question under Claim Travel Allowance. Choose Yes, I want to claim Travel Allowance.

This option can still be accessed later by reopening the Report Header. (Report Details, then Report Header)

The second way to access this information later or to access it again, is to choose the **Travel Allowance** drop down and then **Manage Travel Allowance**. (To create an Itinerary you have to choose the **1 Create New Itinerary** option in the top left)

The **Claim Travel Allowance** option is at the bottom of the **Report Header** (Report Details, then Report Header)

The screenshot shows the 'Claim Travel Allowance' section of a SAP Concur expense report. At the top, there are three dropdown menus: 'Program' (set to '(60) Institutional Support'), 'Activity' (set to 'Search by Text'), and 'Location' (set to 'Search by Text'). Below these is a 'Comment' text area. The 'Claim Travel Allowance' section contains the following text: 'If this report is going to contain a request for your personal meal Per Diem continue to the Create New Itinerary page by clicking Yes. Otherwise click No.' There are two radio button options: 'Yes, I want to claim Travel Allowance' (which is selected and highlighted in yellow) and 'No, I do not want to claim Travel Allowance'. At the bottom right, there is a 'Next' button (highlighted in green) and a 'Cancel' button. A small text note at the bottom right says 'Next: Create report and add itinerary details for your travel allowances'.

Second option, **Travel Allowance** drop down and then **Manage Travel Allowance**.

The screenshot shows the SAP Concur 'Travel Report' interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted in blue), 'Invoice', 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, there are two tabs: 'Manage Expenses' and 'Process Reports'. The main content area shows 'Travel Report \$0.00' with a trash icon and 'Not Submitted'. A 'Submit Report' button is in the top right. Below this, there are several dropdown menus: 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance' (highlighted in yellow). Below these are several buttons: 'Add Expense', 'Edit', 'Delete', 'Combine Expenses', and 'Move to'. The 'Manage Travel Allowance' button (highlighted in yellow) is located between 'Delete' and 'Combine Expenses'. At the bottom, it says 'No Expenses' and 'Add expenses to this report to submit for reimbursement.' A 'View: Standard' dropdown is on the right.

In this step you will enter your travel information and create the trip Itinerary.

1. Input the departure city, date and time of departure, arrival city, date and time of arrival.
2. Select "Save"

CONCUR | Requests | Travel | Expense | Reporting | App Center | Administration | Help | Profile

### Travel Allowances For Report: Meal Per Diem

Create New Itinerary | Available Itineraries | Expenses & Adjustments

Itinerary Info

Itinerary Name: Meal Per Diem | Selection: EMU-Custom-Vers-2

**New Itinerary Stop**

Departure City: Ypsilanti, Michigan

Date: 12/31/2016 | Time: 1:00 PM

Arrival City: Chicago, Illinois

Date: 12/31/2016 | Time: 5:00 PM

**Save**

Go to Single Day Itineraries | Next >> | Done

3. Input the next departure city (the arrival city from step 2), date and time of departure, arrival city, date and time of arrival.
4. Select "Save"
5. If there were additional segments of the trip, continue repeating steps 4 and 5 until all segments of trip have been recorded.

CONCUR | Requests | Travel | Expense | Reporting | App Center | Profile

### Travel Allowances For Report: Meal Per Diem

Edit Itinerary | Available Itineraries | Expenses & Adjustments

Itinerary Info

Itinerary Name: Meal Per Diem | Selection: EMU-Custom-Vers-2

| Departure City                             | Arrival City                             | Arrival Rate Location |
|--------------------------------------------|------------------------------------------|-----------------------|
| Ypsilanti, Michigan<br>12/31/2016 01:00 PM | Chicago, Illinois<br>12/31/2016 05:00 PM | COOK COUNTY, US-IL, U |

**New Itinerary Stop**

Departure City: Chicago, Illinois

Date: | Time:

Arrival City: Ypsilanti, Michigan

Date: | Time:

**Save**

Go to Single Day Itineraries | Next >> | Done

6. Once all segments of the trip have been recorded, select "Next."

**Travel Allowances For Report: Meal Per Diem**

Itinerary Name: Meal Per Diem | Selection: EMU-Custom-Vers-2

|                          | Departure City                             | Arrival City                               | Arrival Rate Location  |
|--------------------------|--------------------------------------------|--------------------------------------------|------------------------|
| <input type="checkbox"/> | Ypsilanti, Michigan<br>12/31/2016 01:00 PM | Chicago, Illinois<br>12/31/2016 05:00 PM   | COOK COUNTY, US-IL, US |
| <input type="checkbox"/> | Chicago, Illinois<br>01/02/2017 01:00 PM   | Ypsilanti, Michigan<br>01/02/2017 05:00 PM | WASHTENAW COUNTY, U... |

**New Itinerary Stop**

Departure City: Ypsilanti, Michigan

Date: [ ] Time: [ ]

Arrival City: [ ]

Date: [ ] Time: [ ]

Save

Go to Single Day Itineraries | **Next >>** | Done

- Uncheck the box for each meal which should be reimbursed. Leave the box checked for any meal which was provided as part of the conference or event.

**Travel Allowances For Report: Meal Per Diem**


Show dates from [ ] to [ ]

| Exclude   All            | Date/Location                   | Breakfast Provided                  | Lunch Provided                      | Dinner Provided                     | Allowance |
|--------------------------|---------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|
| <input type="checkbox"/> | 12/31/2016<br>Chicago, Illinois | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00    |
| <input type="checkbox"/> | 01/01/2017<br>Chicago, Illinois | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00    |
| <input type="checkbox"/> | 01/02/2017<br>Chicago, Illinois | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00    |

Update Expenses | Cancel

- Select "Update Expenses" The Fixed Meals expenses will populate to the expense report.

□ ×



A screenshot of the 'Update Expenses' button, which is a green rectangular button with a blue border and a yellow highlight on the right side. The text 'Update Expenses' is written in a bold, black, sans-serif font. The button is circled with a red oval.

- Travel Report \$148.00 

Not Submitted

Submit Report

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

|                                     |                                                                                     |            |                 |                 |          |                   |           |                  |              |
|-------------------------------------|-------------------------------------------------------------------------------------|------------|-----------------|-----------------|----------|-------------------|-----------|------------------|--------------|
| Add Expense                         |                                                                                     | Edit       | Delete          | Copy            | Allocate | Combine Expenses  | Move to ▾ | View: Standard ▾ |              |
| <input checked="" type="checkbox"/> | Alerts ↑↓                                                                           | Receipt ↑↓ | Payment Type ↑↓ | Expense Type ↑↓ |          | Vendor Details ↑↓ |           | Date ≡           | Requested ↑↓ |
| <input checked="" type="checkbox"/> |  |            | Cash            | Fixed Meals     |          | Chicago, Illinois |           | 09/09/2022       | \$74.00      |
| <input checked="" type="checkbox"/> |  |            | Cash            | Fixed Meals     |          | Chicago, Illinois |           | 09/08/2022       | \$37.00      |
| <input checked="" type="checkbox"/> |  |            | Cash            | Fixed Meals     |          | Chicago, Illinois |           | 09/07/2022       | \$22.00      |
| <input checked="" type="checkbox"/> |  |            | Cash            | Fixed Meals     |          | Chicago, Illinois |           | 09/06/2022       | \$15.00      |
|                                     |                                                                                     |            |                 |                 |          |                   |           |                  | \$148.00     |

10. The Business Purpose and the Fixed Meal Type should both be completed. In the Business Purpose field, input the reason for the trip, i.e. name of the conference attended.
11. In the Fixed Meal Type field, choose an option from the drop down menu. The options are: Domestic Travel, International Travel, Recruiting Travel, and Team Travel.

The screenshot displays the SAP Concur interface. On the left, a 'Travel Report \$148.00' is shown as 'Not Submitted'. It includes a table of expenses with columns for Alerts, Receipt, and Payment Type. The main area shows a modal titled 'Edit Expenses' for 4 selected expenses. The modal contains fields for 'Business Purpose' (highlighted in yellow), 'Fixed Meal Type' (highlighted in yellow), and a 'Comment' field. The 'Next' button is highlighted in blue. On the right, a 'Submit Report' button is visible.

| Alerts                              | Receipt | Payment Type |
|-------------------------------------|---------|--------------|
| <input checked="" type="checkbox"/> |         | Cash         |
| <input checked="" type="checkbox"/> |         | Cash         |
| <input checked="" type="checkbox"/> |         | Cash         |
| <input checked="" type="checkbox"/> |         | Cash         |

| Date            | Requested |
|-----------------|-----------|
| 09/09/2022      | \$74.00   |
| 09/08/2022      | \$37.00   |
| 09/07/2022      | \$22.00   |
| 09/06/2022      | \$15.00   |
| <b>\$148.00</b> |           |

12. The Comment field may be completed if you choose or if additional information is necessary for the expenses.
13. Once the Business Purpose and Fixed Meal Type are completed, select **Next**, then choose **Save**. All of the selected expenses will be updated.
14. Attach a conference itinerary (if applicable) to one of the Fixed Meals expenses as a receipt.

15. Select any one of the Fixed Meals Expense to open the detailed view, choose Show Receipt, then Upload Receipt Image. You can then choose a document from your computer or add a previously uploaded receipt.

The screenshot displays the SAP Concur interface for managing expenses. A modal dialog titled "Attach Receipt" is open, showing an "Upload Receipt Image" button with a 5MB limit per file. The dialog also lists a previously uploaded file, "Receipt Example.pdf", with an "Attach" button. The background shows the "Fixed Meals" expense details for the date 09/08/2022, including fields for Transaction Date, Business Purpose (Meals), Vendor Name, City (Chicago, Illinois), Payment Type (Cash), Amount (37.00), Currency (US, Dollar), and Fixed Meal Type (Domestic Travel). A "Save Expense" button is visible at the bottom left of the form.

**SAP Concur**

Manage Expenses Process R

Fixed M

09/08/2022

Details

Allocate

Expense Type

Fixed Meals

Transaction Date

09/08/2022

Business Purpose

Meals

Vendor Name

City

Chicago, Illinois

Payment Type

Cash

Amount

37.00

Currency

US, Dollar

☐ Personal Expense (do not reimburse)

Fixed Meal Type \*

Domestic Travel

Comment

Save Expense Cancel

Attach Receipt

Upload Receipt Image

5MB limit per file

Receipt Example.pdf

Uploaded: 08/01/2022 7:13 PM

Attach View

Close

Hide Receipt

Upload Receipt Image