Getting Started

1. Log in to my.pitt.edu.
2. Click the link for **PantherExpress Travel and Expense Management.**
3. You will be taken to the Concur home page.

Create an Expense Report for Travel Booked in Concur

1. Booking Travel in Concur (airfare, hotel, car rental) auto-creates an approved **Request**.
2. To start an Expense Report click **Requests**, on the Quick Task Bar. Identify the applicable **Request**, and click **Expense** under the **Action** heading.
3. **Create a New Expense Report** will open, and **Header** information will automatically populate from the travel booking.
4. Click **Next.**
5. Respond to the question "**Are you traveling and receiving a Per Diem for meals**?" If the traveler will be reimbursed for meal costs using a Per Diem rate, respond **Yes,** and continue with step 6. If meals will not be reimbursed using a Per Diem, respond **No**, and proceed to entering Travel Card and Out-of-Pocket expenses.
6. Click the checkbox to select the trip, and click **Import Itinerary**. Click **Expenses and Adjustments**.
7. For each day of travel, note what meals were provided. These are meals for which the traveler does not need reimbursed (e.g., breakfast at home before travel began, or lunch provided by a conference sponsor).
8. Concur will calculate the daily meal allowance, subtracting for meals that were not part of travel, or were provided.
9. Click **Create Expenses.**
10. Daily meal reimbursement amounts will display.

Travel Card Expenses

To add Pitt Travel Card expenses to an open expense report, click **Import Expenses**. Select the expenses to apply to the current report, click **Move**, then select **To Current Report.** Travel card transactions can also be added from the following screens:

- Credit Card Charges Page (Expense >View Transactions)
- Available Expenses (Expense>Manage Expenses)
- Quick Task Bar (Available Expenses)

> Note: When claiming a Per Diem for meals, if any meals were charged to the Travel Card they must be deducted from the reimbursable amount.

Travel Card – Reconciling meals charged to a Travel Card when claiming a Per Diem

1. Select the travel card expense item.
2. Enter the Expense Type as Actual Meal Cost (Applied to Per Diem).
3. Click **Save.**

Travel Card – Reconciling meals charged to a Travel Card when there are no out–of–pocket meal costs (No Per Diem)

1. Select the travel card expense item.
2. Enter the Expense Type as Actual Meal Cost (In lieu of Per Diem).
3. Click Save.

Entering Out–of–Pocket Expenses

1. In the open report, click **New Expense.**
2. Select an **Expense Type**.
3. Enter information in all required fields (indicated by a red strip).
4. Click **Attach Receipt** and select a receipt from your receipt store if they are loaded into Concur. Otherwise, browse your file directories to attach a copy of the receipt.
5. **Itemize** if necessary.

> Note: If starting a new expense report that has all out-of-pocket expenses, start by clicking Expense, Create a New Expense Report.

Meal Per Diems (manual entry)

Follow these steps when travel was not booked through Concur

1. For example, you traveled Pgh to Seattle RT for a conference**.** Airfare, hotel, car rental was booked via Expedia, Travelocity, etc.
2. Select **Create a New Report**, complete **Report Header**, and respond Yes, "**Are you traveling and receiving a Per Diem for meals?**
3. Enter first **Itinerary Stop** (Pgh to Seattle), and click **Save.**

4. Enter the **Next Itinerary Stop** (Seattle to Pgh), and click **Save.**
5. Note: For non-direct flights (Pgh to Houston <layover> to Seattle, it is not necessary to include layover destinations in the itinerary, just the final destination. For trips that include stays at multiple destinations (e.g., Pgh to Houston <with a stay>, Houston to Seattle <with a stay>, Seattle to Pgh) there should be an itinerary for each stay and the return trip (in this case 3 itineraries).
6. Click **Expenses and Adjustments.**
7. For each day of travel, note what meals were provided. These are meals for which the traveler does not need reimbursed (e.g., breakfast at home before travel began, or a lunch provided by a conference sponsor).
8. Concur will calculate the daily meal allowance, subtracting for meals that were not a part of travel, or were provided.
9. Click **Create Expenses.**

Actual Meal Costs

When reimbursing for meals paid out-of-pocket using actual or fixed meal costs, use the Expense Type Actual Meal Cost (In lieu of Per Diem)
1. Add a New Expense.
2. Enter the expense type as Actual Meal Cost (In lieu of Per Diem).
3. Enter all required fields.

Group Business Meals and Functions

1. Select the Expense type **Group Business Meal** (with or without Alcohol).
2. Complete all required fields.
3. Click **New Attendee.** Complete required information. Use **Advanced Search** to select Attendee Type, **Faculty/Staff**.
4. Click **Save**, or **Save & Add Another** to add multiple attendees.
5. Attach meal or event receipts.

> For Group Business Meals>10 Attendees, and Receptions, instead of entering attendee names, enter the Event Name. Enter Attendee Count, and No Shows. The system displays the event total, and costs for No Shows, and Attendees.

Entering Personal Car Mileage

1. With the expense report open, on the **New Expenses** tab, select **Mileage-Personal Car**.
2. Google **Mileage Calculator** window automatically displays. Enter **Way Points** –Actual starting point (e.g., home, office, or hotel location, if already in travel) and Destination.
3. Click **Calculate Route** (If needed, map display can be adjusted to reflect actual route taken).
4. If applicable, click **Make Round Trip.**
5. If you started from home on a normal business day, click **Deduct Commute**. Enter home and office location. Click **Deduct Round Trip**, if applicable.
6. Click **Add Mileage to Expense.**

Itemizing Nightly Lodging Expenses

> Concur requires you to itemize daily charges, when using the Lodging expense type. If lodging was charged to a Travel Card, and the supplier has E-Receipt capability, the expenses might automatically be itemized. If they are not automatically itemized, or if lodging was paid for out-of-pocket, it should be itemized when the expense is entered. For lengthy or complex hotel stays that are difficult to itemize (athletic teams, student groups, stays involving prepayments), use the **Lodging-Deposits/Payments** expense type which **does not require itemization.**

To Itemize Lodging:
1. Create the expense as usual, selecting the **Lodging** expense type.
2. Complete the required fields.
3. Click **Itemize.**
4. Enter daily recurring charges, including room rate and taxes *(notice the option to combine daily room rate and taxes into a single entry).*
5. Enter additional daily charges e.g., online fees, parking, valet.
6. Click **Save Itemizations.**
7. Itemization amounts must equal expense amounts. Continue to itemize expenses (nightly or individual) until they are equal.

Account Allocations

By default all expenses will be charged to the account entered in the Expense Report Header. To allocate to different accounts:

1. Check off the line item(s) you would like to allocate. Clicking in the checkbox to the left of **Date** selects all line items.
2. Use the **Allocate** hyperlink to the right of the expense items that says "Allocate the select expenses".
3. Allocate by percentage or dollar amount. If allocating to more than one account, click **Add New Allocation**.
4. Enter or select the appropriate account segment values.
5. Click **Save**, then **Done** to return to your report.

Attaching Receipts to an Expense Report

Concur mobile app:
- Within the app, use the Receipt icon to take a picture of your receipt. The receipt will be added to your Receipt Store.
- From your expense report, click **Receipts, View Available Receipts**. Drag a receipt to the corresponding line item on your report.

ExpenseIt app:
- Within the app, use the Receipt icon to take a picture of your receipt.
- An expense will be created from the receipt, and the expense and receipt image will display under Expense, Manage Expenses.

Scanned Images:
- Scan your receipts and save the file(s) to your computer.
- Click on the line item that requires a receipt, then click **Attach Receipt** on the right side of the screen.
- Click **Browse** to locate the file on your computer, then **Attach** and **Close**.

Email: *(your email address must be verified in your Concur profile)*
- Email your receipt images as attachments to receipts@concur.com. The receipts will be added to your Receipt Store.
- From your expense report, click **Receipts, View Available Receipts**. Drag a receipt to the corresponding line item on your report.

Delegates and Available Receipts

1. A delegate can upload receipt images to Concur for attachment to the line item of the user's report they are acting on, as long as the user has a verified email address setup in Profile Settings.
2. The delegate must enter the traveler's @pitt.edu email address in the Subject line if emailing the traveler's receipts to receipts@concur.com.

Missing Receipt Affidavit

> Expense delegates cannot create Missing Receipt Affidavits. Missing Receipt Affidavits are not permitted for lodging, airfare, care rentals and conference registrations.

From your expense report, click **Receipts** > **Missing Receipt Affidavit**.
1. Select the expense for which you are missing a required receipt.
2. Review the attestation then click **Accept & Create**.

To Submit a Report

1. Click **Submit Report** button.
2. **Note:** Delegates cannot submit reports. If you are a Delegate, click **Notify Employee.**
3. The employee will find the report on the Concur home page under **Open Reports**.
4. The employee can click the expense report name to open the report, and then click **Submit Report.**

To Recall a Report

1. Submitted reports display on the **Expenses** home page, under Active Reports.
2. Click the Expense Report name to open the report.
3. Click **Recall.**
4. Recalled reports can be modified and resubmitted.

Returned Reports

1. Approvers cannot modify reports, but can return them for corrections.
2. Returned Reports display on the Expenses home page, under Active Reports.
3. Click the Expense Report name to open the report.
4. Make the requested changes.
5. Click **Submit Report**.
6. **Note:** If a report was entered by a delegate, and is returned by the approver, both the employee and delegate will receive email notification, and both will be able to modify the returned report.

To Find a Previously Submitted Report

- Click **Expense**, **Report Library.**

Questions:

Contact **PantherExpress Customer Service:**

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Email – pantherexpresscs@cfo.pitt.edu

Web Inquiry – http://cfo.pitt.edu/pexpress/CustomerService/inquiry.php