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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.
2. Click Expense from the main menu and either select + Create New Report or access an open report by clicking on the report name.

Travel Card Charges
3. To expense a Travel Card charge, select Import Expenses and the available card charges will appear on the right side of the screen.
4. Click the box to the left of the transaction and click Move to pull the charge over to the expense report or click on the charge and drag it to the expense report on the left side of the screen.
5. If the transaction does not default to the correct expense type, use the drop-down menu under Expense Type to select Train.
6. 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.
7. Additional information may also be entered in the available fields.

Cash/Out of Pocket Charges
8. To expense a Cash/Out of Pocket charge, click on + New Expense at the top of the screen.
9. Either type in Train in the Expense Type search bar at the top right of the expense report or scroll though the list of All Expense Types at the bottom right of the expense report and select Train.
10. 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.
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11. Enter the city of purchase in the City field.

12. Change the Payment Type to Cash/Out of Pocket. Please note that Pending Card Transactions should not be expensed until the transaction has posted. Please see the above section on Travel Card Charges for more information.

13. 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

14. All charges for Train will require a receipt. Expenses that require a receipt will show a yellow exclamation point icon. Most vendors will provide an e-Receipt (denoted with the e-Receipt icon) for Travel Card transactions to satisfy the receipt requirement however, if the rail 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.

15. A pop-up box will appear and you can click Browse to locate the receipt saved on a local device or, if the receipt image was uploaded previously, the receipt will be available in Available Receipts. Locate the correct receipt and select Attach.

16. Once the receipt requirement has been added, the icon will show a blue check box indicating that the receipt requirement has been met.

17. Click Save.