Quick Reference Guide: Licenses/Permits

Licenses/Permits are classified as the expenses for a license or permit to perform OU related business. Reimbursements for Licenses/Permits are allowed through the system if for business. The Travel Card can only be used to pay for Licenses/Permits if the expense is in relation to a travel objective. Please use this guide to appropriately expense Licenses/Permits.

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.

Report Header

3. If the information in the report header needs to be completed, enter in the Event Name/Nature of Business, Report/Trip Start Date, Report/Trip End Date, Trip Type, Traveler/User Type and Report/Trip Purpose.
   a. For non-travel reports, the Event Name/Nature of Business should reflect the reason for the report. Example: ABC License Renewal.
   b. The Report/Trip Start Date and Report/Trip End Date should reflect either when the purchase was made or the time frame for the reimbursement. Example: Report/Trip Start Date and End Date: 07/01/2020 for a one-time transaction or Report/Trip Start Date: 07/01/2020, Report/Trip End Date: 09/30/2020 for a recurring report.
   c. Trip Type should be Non Travel.
   d. Traveler/User Type should be Employee.
   e. Report/Trip Purpose should be Non Travel Expenses.
4. Under the field of Does this trip contain personal travel?, select No.
5. If additional information needs to be provided, enter that in the Comment section.
6. If a chartfield spread did not automatically populate from your Profile, enter in the Business Unit of NORMN, Fund, Org, Project, Source, Function, Entity and Purpose. When entering the Fund, Org and Project you will select from the options in the drop-down menu. When selecting Function, Entity, Source and Purpose you will need to enter in the full code, wait for the correct code to appear below the list and then select it.
7. Click Next at the bottom of the screen.
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8. A pop-up menu will appear asking if the Expense Report will include either Per Diem or Lodging expenses. Select No and you will be taken into the Expense Report.

Travel Card Charges

9. To expense a Travel Card charge, select Import Expenses and the available card charges will appear on the right side of the screen.

10. 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.

11. If the transaction does not default to the correct expense type, use the drop-down menu under Expense Type to select Licenses/Permits.

12. 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.

13. Additional information may also be entered in the available fields.

Cash/Out of Pocket Charges

14. To expense a Cash/Out of Pocket charge, click on + New Expense at the top of the screen.

15. Either type in Licenses/Permits in the Expense Type search bar at the top right of the expense report or scroll through the list of All Expense Types at the bottom right of the expense report and select Licenses/Permits.

16. 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.

17. 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.

18. 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

19. All charges for a Licenses/Permits will require a receipt. To satisfy the receipt requirement, add the receipt by selecting Attach Receipt.
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20. 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**.

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

22. Click **Save**.