

## **Creating a Travel Expense Report**

## When is a Travel Expense Report used?

Travel Expense reports should be used to expense both personal and P-Card charges after a trip has been completed. **Note:** If you purchased travel for individuals other than yourself on a departmental P-Card, those charges can be expensed on a Non-Travel P-Card Report.

**Step One:** Log in to <u>Concur</u> using the SSO login.

Step Two: Click Expense in the top menu bar or +New in the Quick Task bar and Start a Report.

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CLEMS	*N		+ New	Authorization Requests Available Expenses	<b>03</b> Open Reports		
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## Step Three: Click Create New Report.

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Create New Report         \$1,220.00         \$72.50         \$152.75	+ Create New Report	\$1,220.00	\$72.50	\$152.75

**Step Four:** The report type should be **Travel Report**. Begin filling out the required fields in the Report Header if you do not have an approved travel request in Concur. If you do have an approved request in Concur, click **Create From an Approved Request**.

**Note:** All Requests to travel after 7/1/2023 must be fully approved in Concur prior to traveling and the expense report should be created from that request. Travel that was requested and booked prior to

7/1/2023 can be expensed by filling in the required fields and <u>not</u> choosing to create from an approved request.

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Mana	Create From an Approved Request				
Mar	Report Type *			* Required fi	əld
REPC	TEST 1. Travel Report ~				port
TES 06/27 <b>\$1</b> Retu	Trip Name/Description *	Trip Purpose * None Selected	]		
	Business Travel Start Date *	Business Travel End Date *	Trip Type *	Traveler Type *	

Once all required fields have been completed, click **Create Report**.

**Step Five:** Begin adding your expenses by clicking **Add Expense**. For guidance on adding the new GSA per diem rates, <u>click here</u>.

SAP Concur C	Requests	Travel	Expense	App Center	Help + Profile + 💄
Manage Expenses	View Transactio	ns			
Claire LAX	Nov 20	22 \$0	).00 🟛		Submit Report
Report Details      Print       Add Expense     Print	t 🗸 Manage Edit	Preceipts	Travel Al Copy	Allocate Combine Expenses Move to ~	
				No Expenses Add expenses to this report to submit for reimbursement.	

**Step Six:** Add any applicable CUPcard charges related to the selected trip if necessary or click **Create New Expense** to choose from the list of expense types that are allowable for reimbursement.

vailab	88 le Expenses	+ Create New Exper	nse		
•	Payment T ↑↓	Expense T ↑↓	Vendor De †↓	Date 😇	Amount ↑↓
	TEST CU PCard	Car Rental Fuel	ENTERPRISE RENT-A-CAR Anderson, Indiana	05/23/2022	\$678.00
	TEST CU PCard	Undefined	Eating places and Restaurants Anderson, Indiana	05/22/2022	\$70.70
	TEST CU PCard	Airfare	UTA/INTERAIR Anderson, Indiana	05/22/2022	\$907.98
0	TEST CU PCard	Fuel Supplies (NOT for Car	Automated Fuel Dispensers	05/21/2022	\$98.14
				Close	Add To Report

Click **Add to Report** for CU P-Card transactions to be added or click the Expense Type name on the Create New Expense tab to add to the report automatically.

**Step Seven:** Click anywhere on an expense type line to edit that expense. **Note:** If you see the Alert banner after you add charges to a report, don't panic! Fill out all the required information before you address the Alerts.

Mana	ge Expenses	View Trar	nsactions							
<b>9</b> A	lerts: 3									~
Cla Not Su	ire LA	X Nov	2022 \$1,	585.98	â				Copy Report	Submit Report
Report [	Details 🗸	Print 🗸 🛛	Manage Receipts 🗸	Travel Allowa	ance 🗸					
Add	Expense									
	Alerts↑↓	Receipt↑↓	Payment Type ↑↓		Expense Type	t↓	Vendor D	Details ↑↓	Date =	Requested ↑↓
	Δ		TEST CU PCard		Car Rental Fue	ł	*Enterpris Los Angele	se es, California	05/23/2022	\$678.00
	0		TEST CU PCard		Airfare		UTA/INTE Anderson,	ERAIR Indiana	05/22/2022	\$907.98
										\$1,585.98

**Step Eight:** Once you've opened a line item, begin filling out the required information marked with a Red Asterisk. For **Created Expenses**, make sure the **Payment Type** is **Employee Paid** (this should be chosen only for out-of-pocket expenses). Make sure to **Upload a Receipt** and you can also allocate individual charges at the line item (only needed when expenses need to be split by across different chartstrings).

← → Airfare \$907.	98 💼			Cancel	Save Expense
05/22/2022 UTA/INTERAIR Corpora	ate Car	d			
Details Itemizations					Hide Receipt 🗐
Allocate			$\rightarrow$		
Expense Type *			* Required field		
Airfare			~		
Transaction Date *		Trip Purpose *			
05/22/2022		Conference/Seminar	~		
Trip Type *		Traveler Type *			
3. Out of State	~	Employee	~		
Airline Vendor *		Class of Service *		R	
Delta Air Lines	~	1. Economy/Coach Class	~	Upload Receipt Image	
Payment Type					
TEST CU PCard					
Amount		Currency			
907.98		US, Dollar			
Comment					
				V	
			10		

To upload a receipt click **Upload Receipt**. You can choose to upload a receipt from your computer or complete a **Missing Receipt Declaration** if needed.

Attach Receipt	×
Select a receipt image or reuse one from this report: Don't have a receipt? You'll need to create a missing receipt declaration.	
Available Receipts Receipts in Report	
↑ Upload Receipt Image 5MB limit per file	

**Note:** To get receipts in your profile faster and more efficiently, please reference the <u>Working with</u> <u>Available Receipts</u> training aid.

**Step Ten:** If all required information, allocations, and receipts have been uploaded; click **Save Expense**.

**Step Eleven:** Repeat steps seven through eleven for all expenses until all are complete. If any **Alerts** remain at the top of the screen, click the banner to view the specific errors.

Alerts: 1	<u>^</u>
Expense Car Rental Fuel 05/23/2022 \$678.00	_
You must attach a receipt image to this expense. View	
Claire LAX Nov 2022 \$1,585.98 🟛	Copy Report Submit Report
Not Submitted	

**Note:** Yellow Alerts are there to make you aware of a possible issue and to double-check your work. Red Alerts are errors in which you cannot submit until they are resolved. Alerts will not disappear even after the errors are fixed so once you know you have resolved them try to resubmit.

**Step Twelve:** When all applicable charges have been added and completed, click **Submit Report**.

If you need assistance, please reach out to your Business Office for guidance. Training Aids and resources can be found on our <u>Travel & Expense Website</u>.