Expense Reports - Travel:
Adding Card & OOP Expenses to One Report

Welcome to our training on creating a travel expense report in Concur that includes both purchasing card and out-of-pocket expenses.
Within the expense report, when you come to the screen that allows you to manage the report,
you can edit any expenses pulled in from the approved travel request, if applicable,
and you can add new expenses.
For credit card expenses,
you have a list of available expenses to choose from. All purchase card charges placed on your university purchase card are automatically fed into your Concur profile and are available in the Available Expense list for you to access.
You can select the expenses you wish to add by checking on the applicable boxes on the left side of the Available Expenses screen,
Or you can access them from the Card Transactions tab on the quick links menu at the top of the Concur screen.
Filter the list of charges by checking the Unused Only box near the top of the screen.
From there you can select the expenses you wish to add to the report.
Then click on Add Selected in the top right corner of the screen.
To edit the information for any of the expenses you selected, check the box for the expense and click the Edit button.
Fields that are missing required information are highlighted in red
and the top of the screen will identify any alerts or warnings that require attention. Fill out all required and applicable fields, and resolve any additional alerts or warnings.
To add other out-of-pocket expenses (expenses that are not paid on the purchasing card but paid personally by the traveler and that require reimbursement),
on the Add Expense screen, click the Create New Expense option.
You can search for the expense type you wish to add.
or scroll through the list of expenses using the scroll bar on the right.
Once you click on an expense type, a screen will appear with fields pertaining to that expense type. Fill in all required fields (marked with the red asterisk) and any additional fields that apply.
Once the expense is finalized, with all details included, click on the Save Expense button at the top right of the screen.
The expense will now show as attached to the report.
To go back at any time to edit this expense, check the box associated with the expense at the left of the screen and click Edit.
If there are other expenses that need to be added to the report, search for those and repeat the steps to provide required data.
Once you submit the report, on the report totals screen
you will see the totals for the expenses paid by university credit card
And the total due to the traveler for the out-of-pocket expenses being reimbursed.