Welcome to our training on creating monthly in-state-mileage travel expense reports in Concur.
Monthly in-state-mileage reports are limited to the expenses of mileage, parking, and tolls.
Expense reports for monthly in-state-mileage should be submitted the 15th of the month following the month of expenses.
For example, all expenses from January 1st to 31st would be due by February 15th.
To begin the process of creating a monthly in-state-mileage travel expense report, log in to Concur.
The log-in process takes you to your personal profile. If you are the traveler, this is the profile you want to use.
If you are a delegate acting on behalf of a traveler, you want to switch to that traveler’s profile. Instructions on how to do this are provided in our Delegates training video.
You are now ready to create the expense report. Click on Start a Report.
You will see a screen that looks like this.
Concur refers to the details on this screen as the report header.
You can always get back to the report header screen to view or edit these details by clicking on the Report Details dropdown menu.
Although you will see an option at the top of the screen to create the report from an approved request, that option is not applicable to this type of expense report as monthly in-state-mileage travel does not require a request to be submitted prior to the travel.
This being the case, you want to fill out the report header screen by completing all required fields (marked with the red asterisk) with the details applicable to the expense or expenses you are submitting.
The first field is the policy field. Concur uses the term policy to refer to the category of expenses—in this case, travel expenses.
For the Report Name field, the name of the report should identify the month and expenses you are submitting:
for example, September In-state-mileage.
When all fields are complete, click the Create Report button in the bottom right corner.
You will see a screen that will allow you to manage the report.
and add expenses to it.