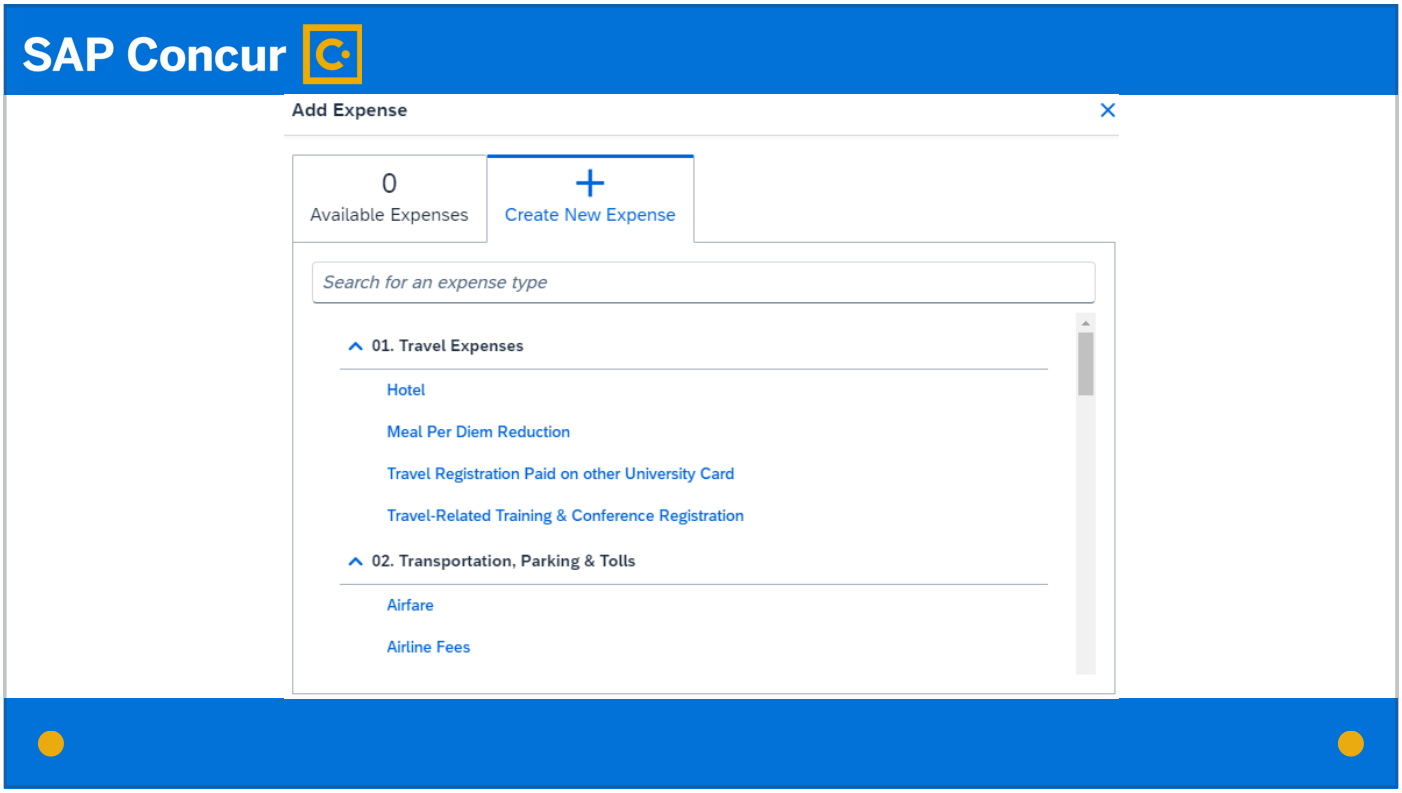
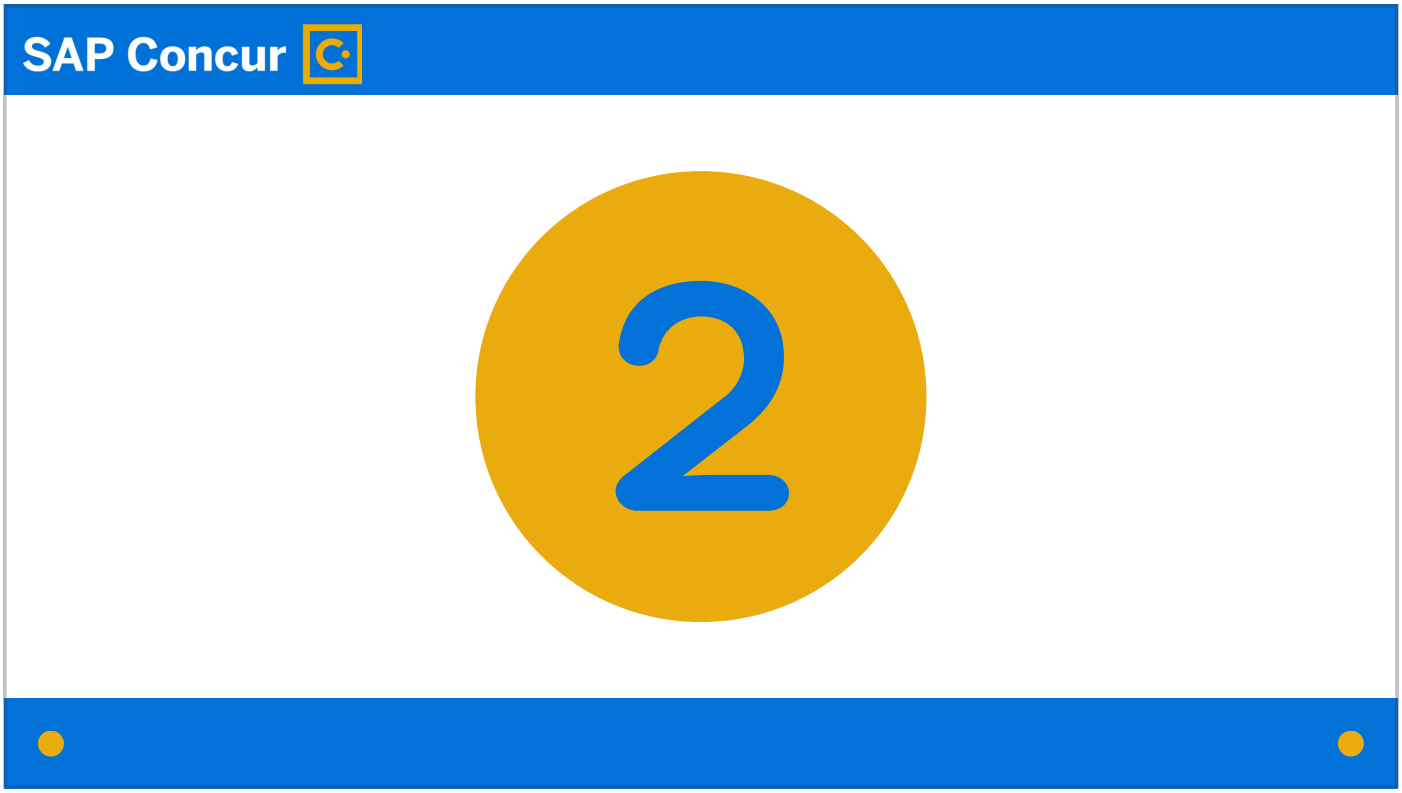
Welcome to our training on creating travel expense reports in Concur.

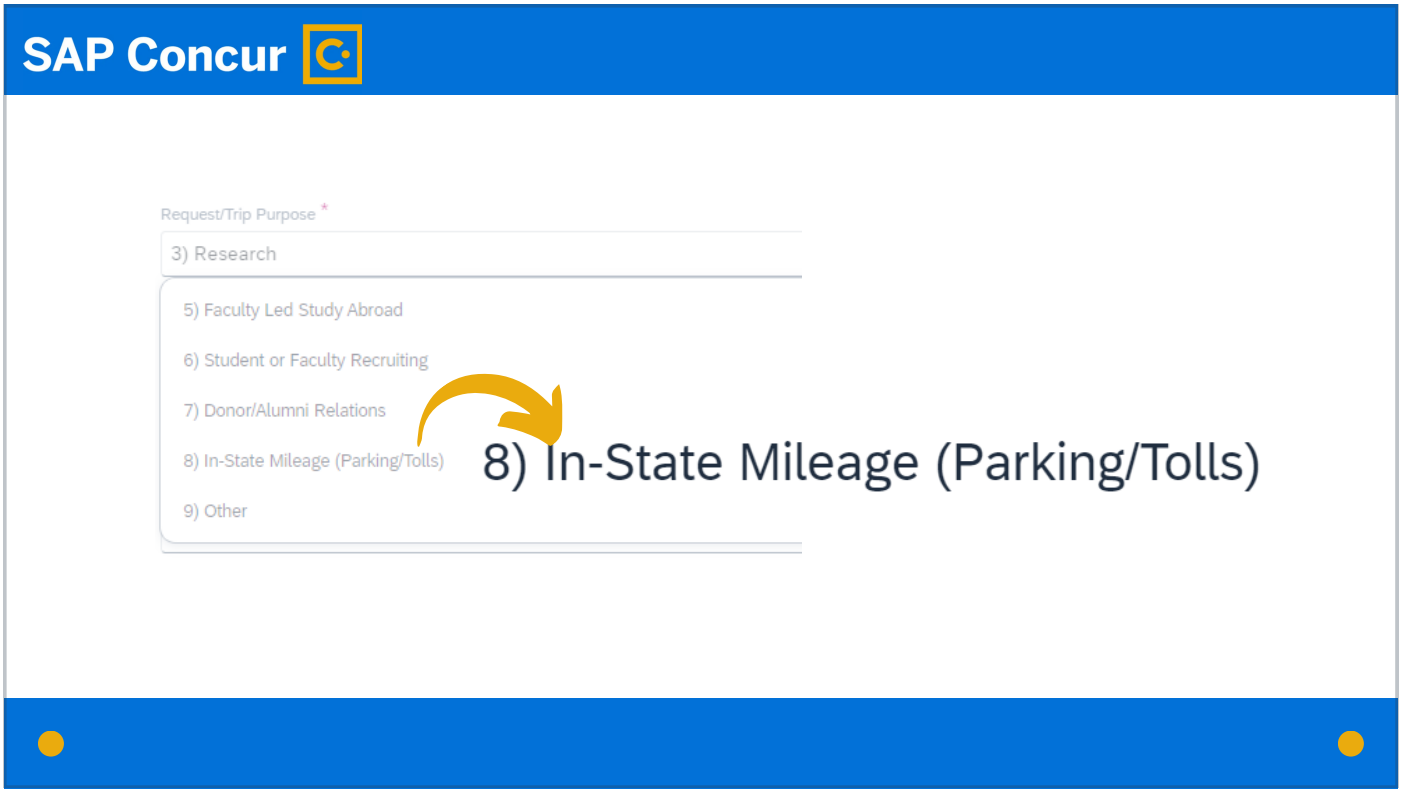
Travel expense reports are required for all university travel-related purchases. This includes expenses paid out of pocket that need to be reimbursed and purchases made on a university purchase card,



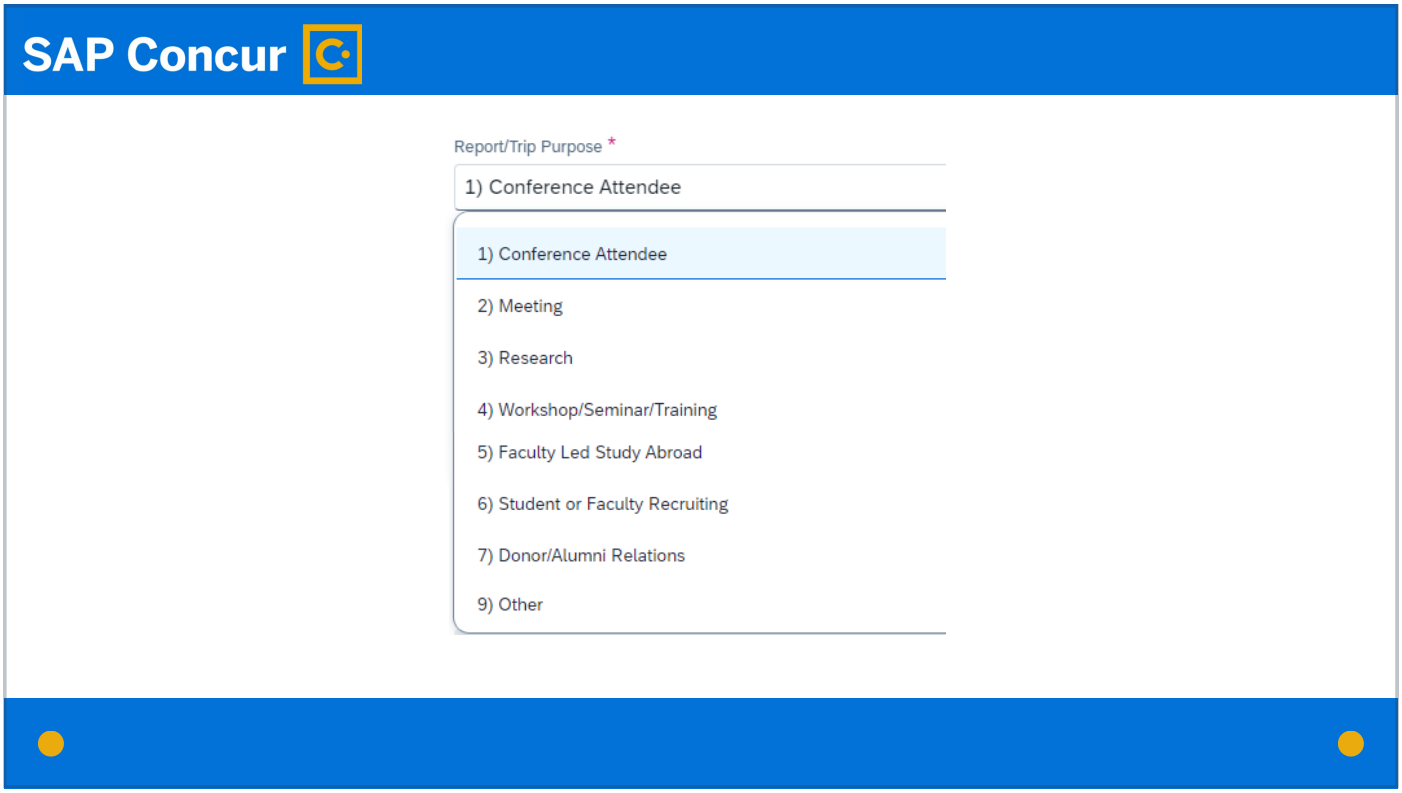
and it applies to such expenses as mileage, airfare, hotel rooms, travel-related training and conference fees, etc.



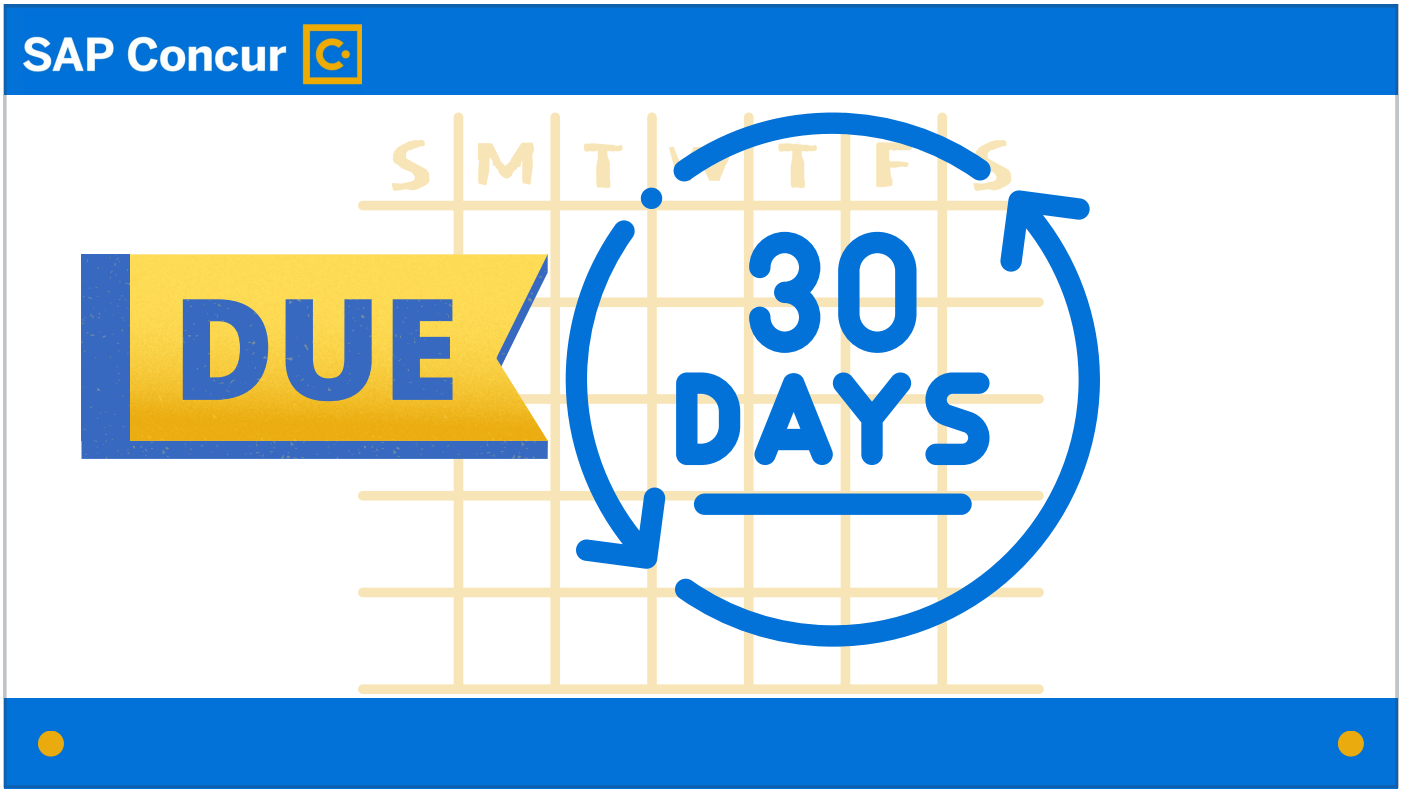
Travel expense reports fall into two types:



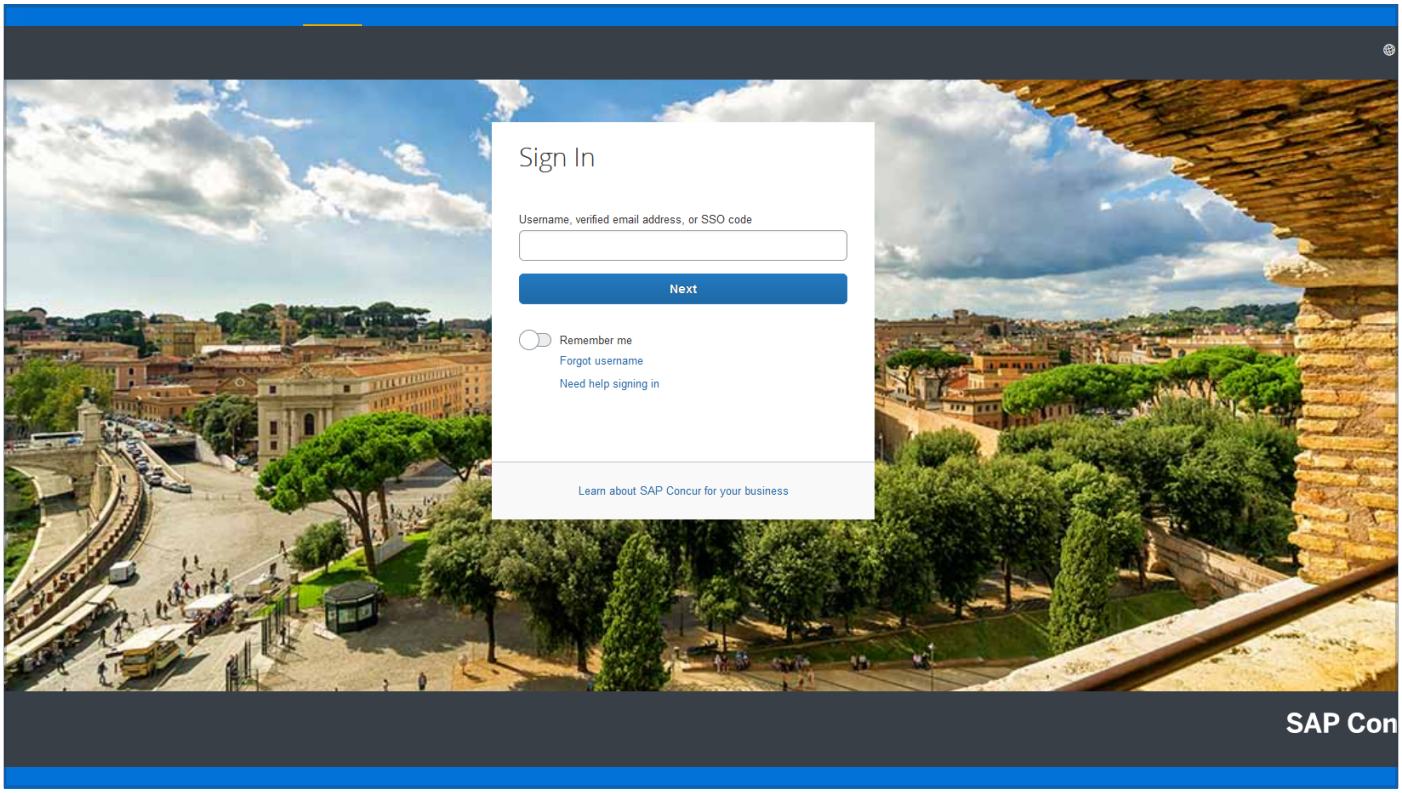
Monthly in-state-mileage reports



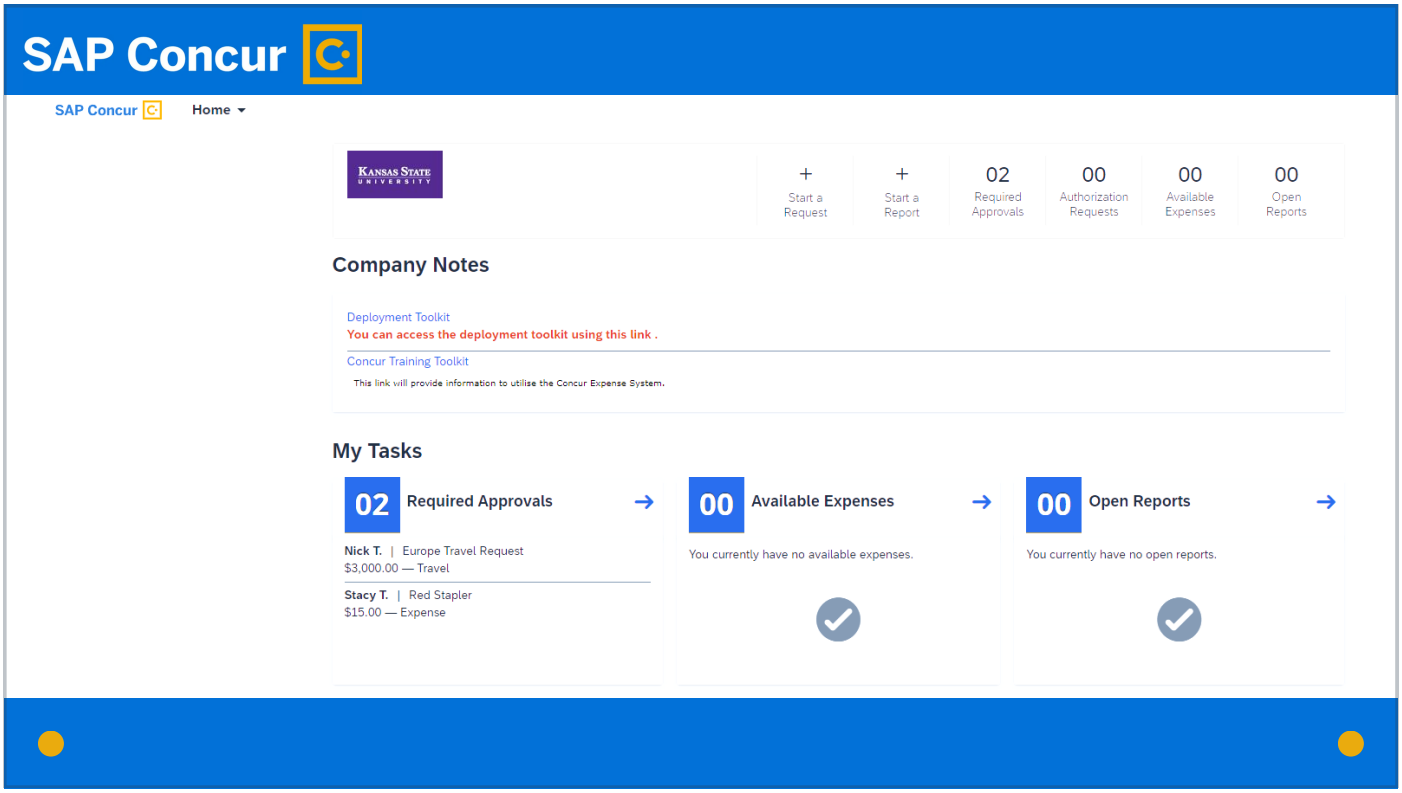
and all other travel. This video is specific to all other travel. For details on creating a monthly in-state-mileage travel expense report, please refer to our training video on that topic.



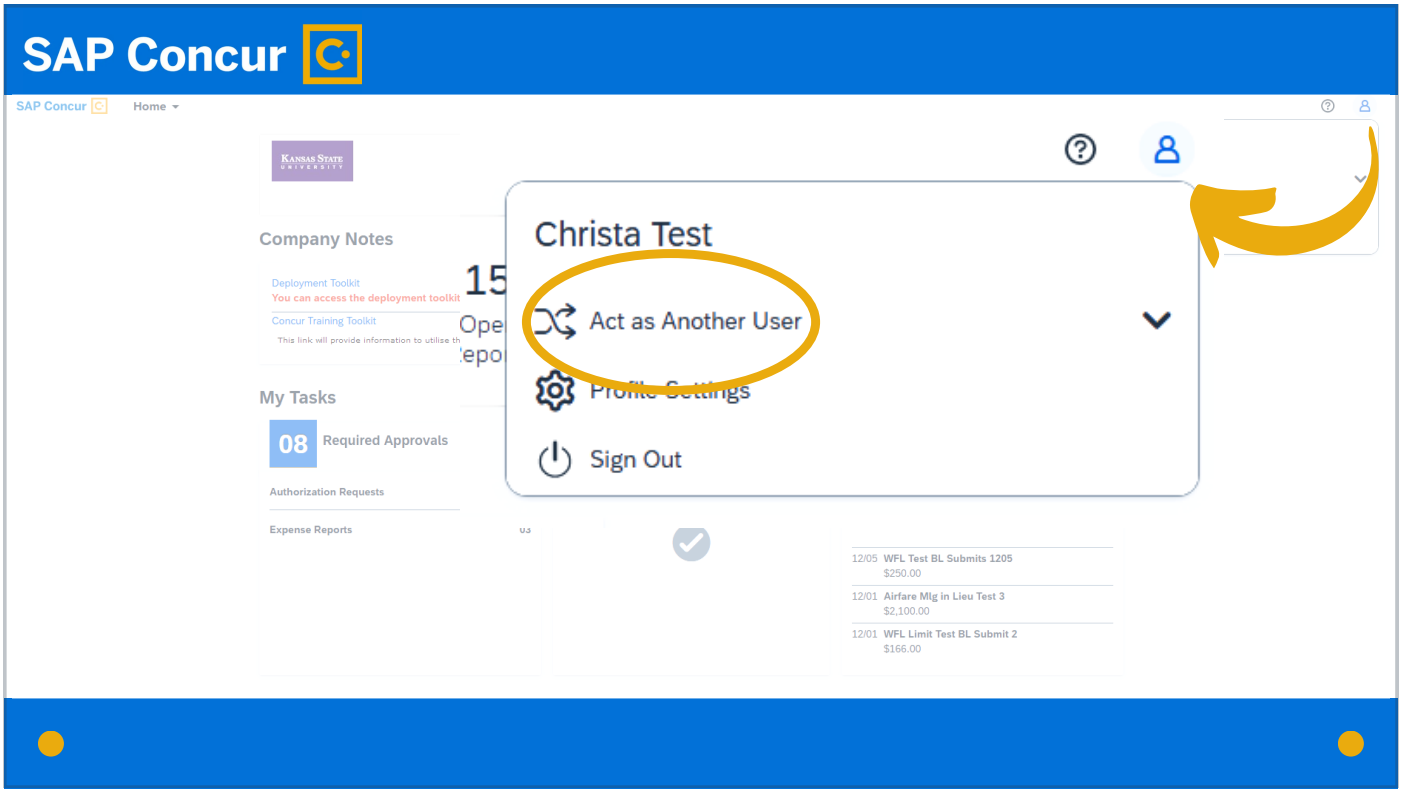
Expense reports for travel should be submitted within 30 days of the end date of travel.



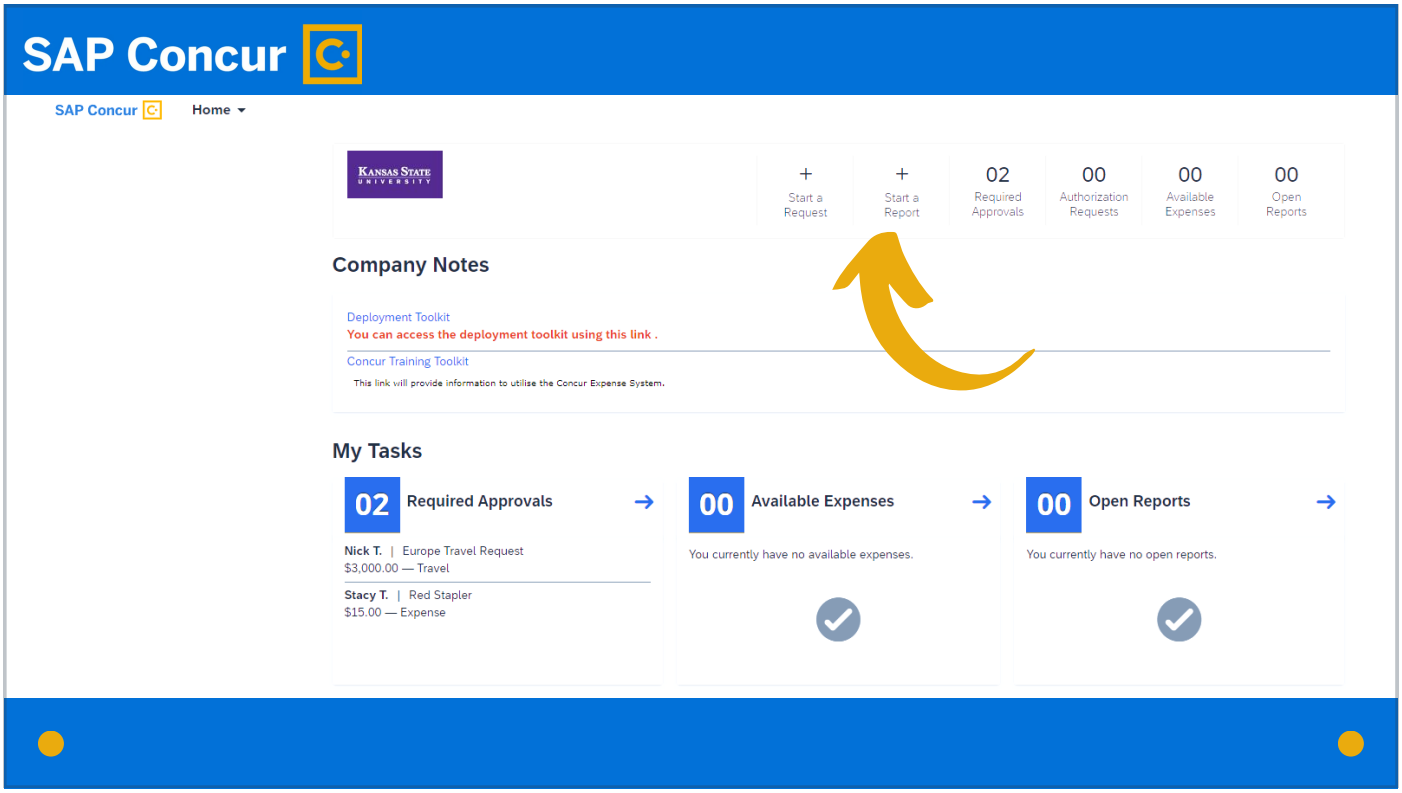
To begin the process of creating a travel expense report, log in to Concur.



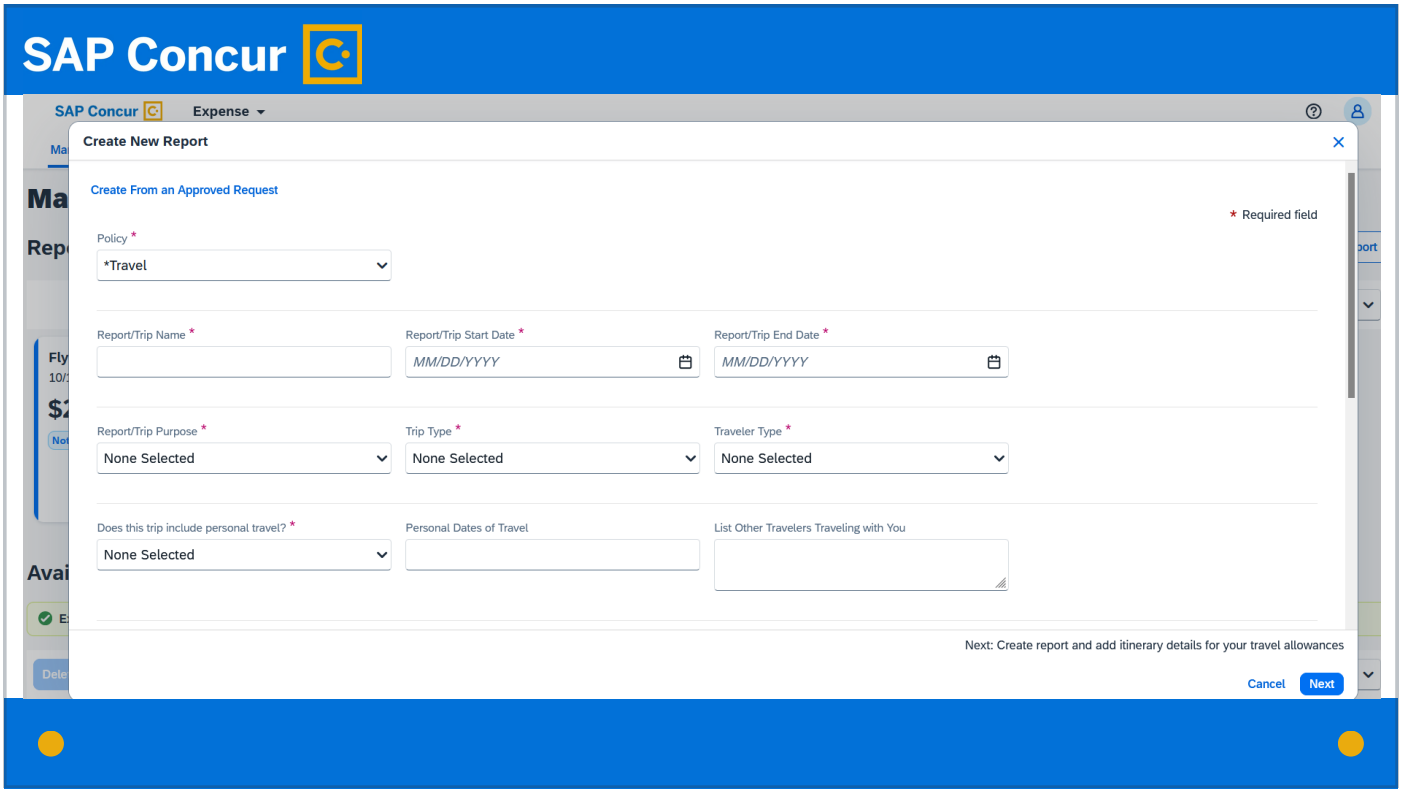
The log-in process takes you to your personal profile. If you are the traveler, this is the profile you want to use.



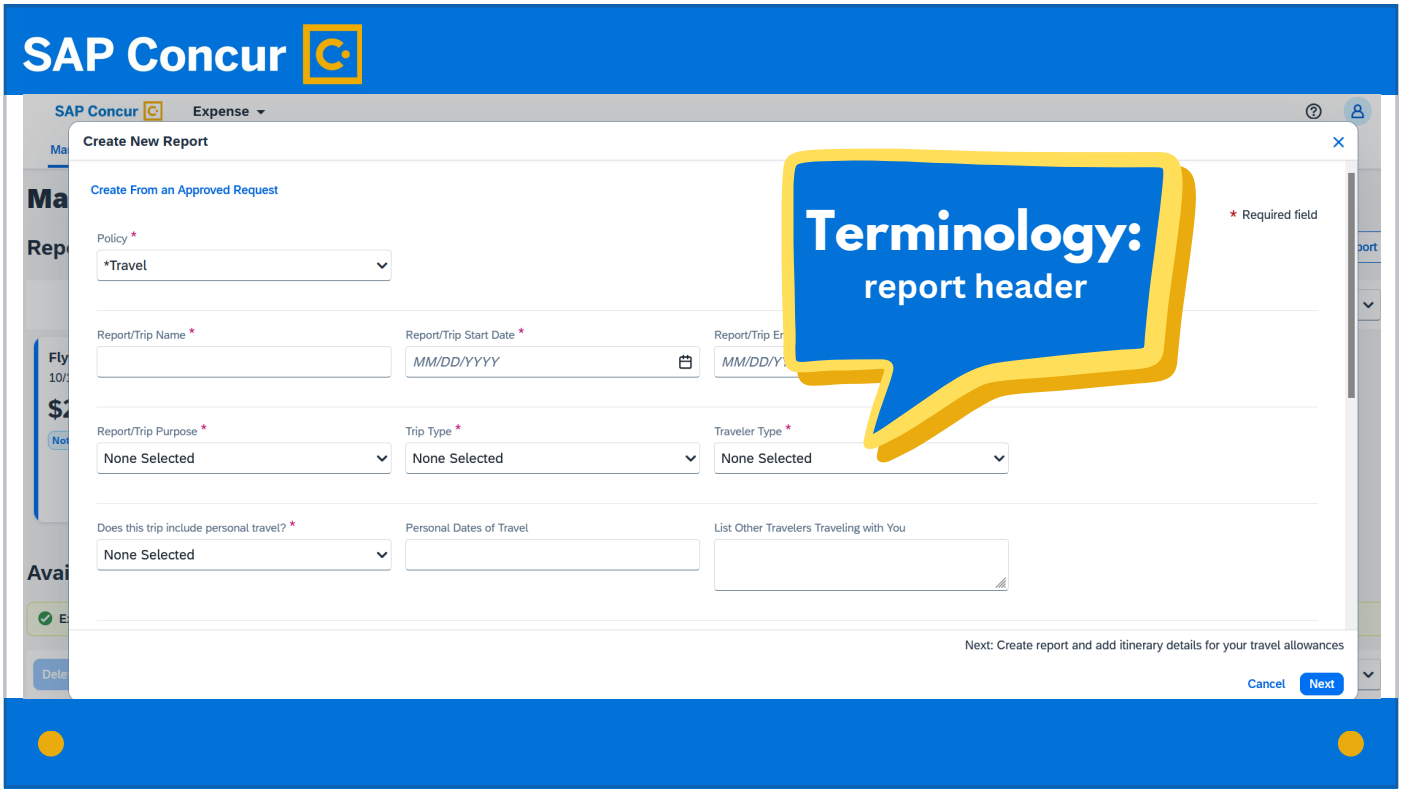
If you are a delegate acting on behalf of a traveler, you want to switch to that traveler's profile. Instructions on how to do this are provided in our Delegates training video.



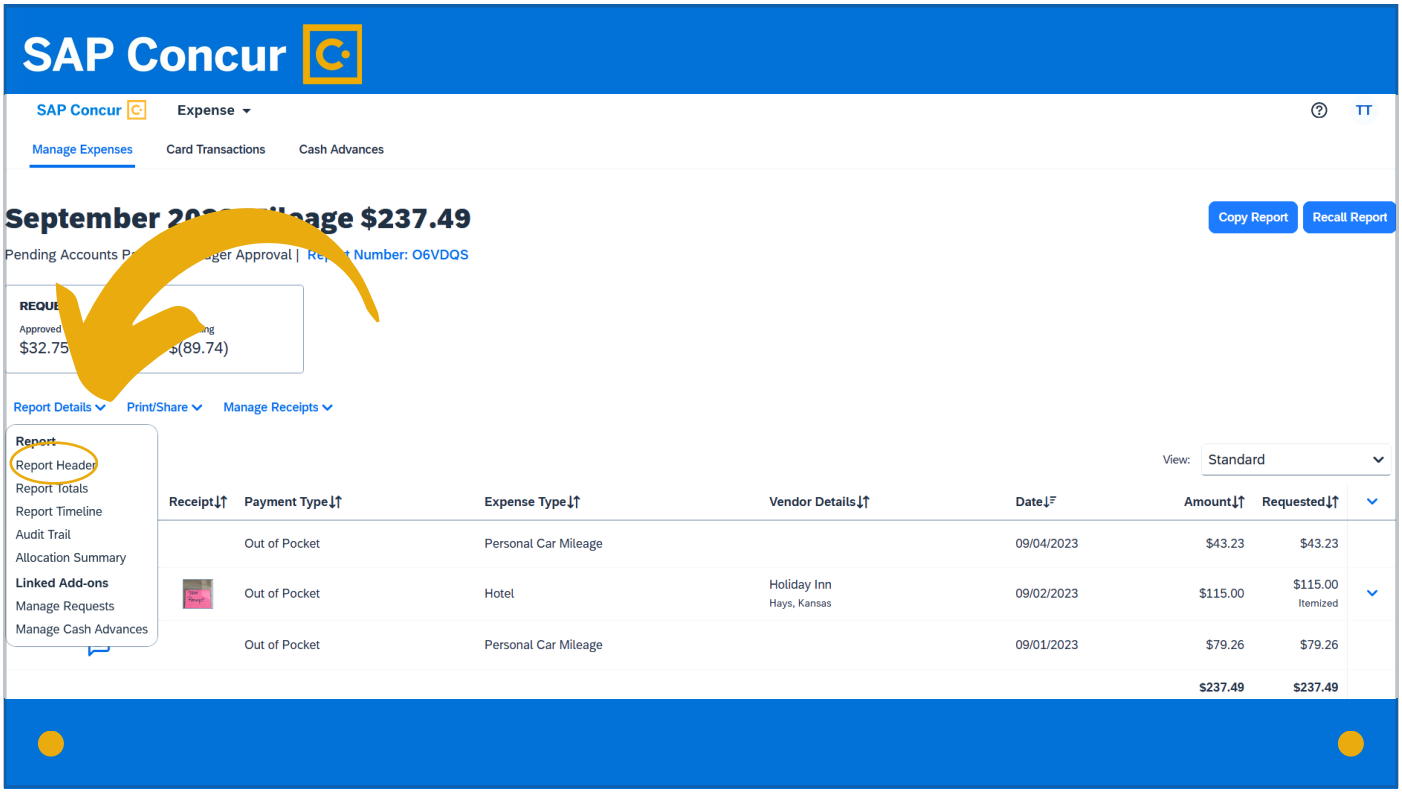
You are now ready to create the report. Click on Start a Report.



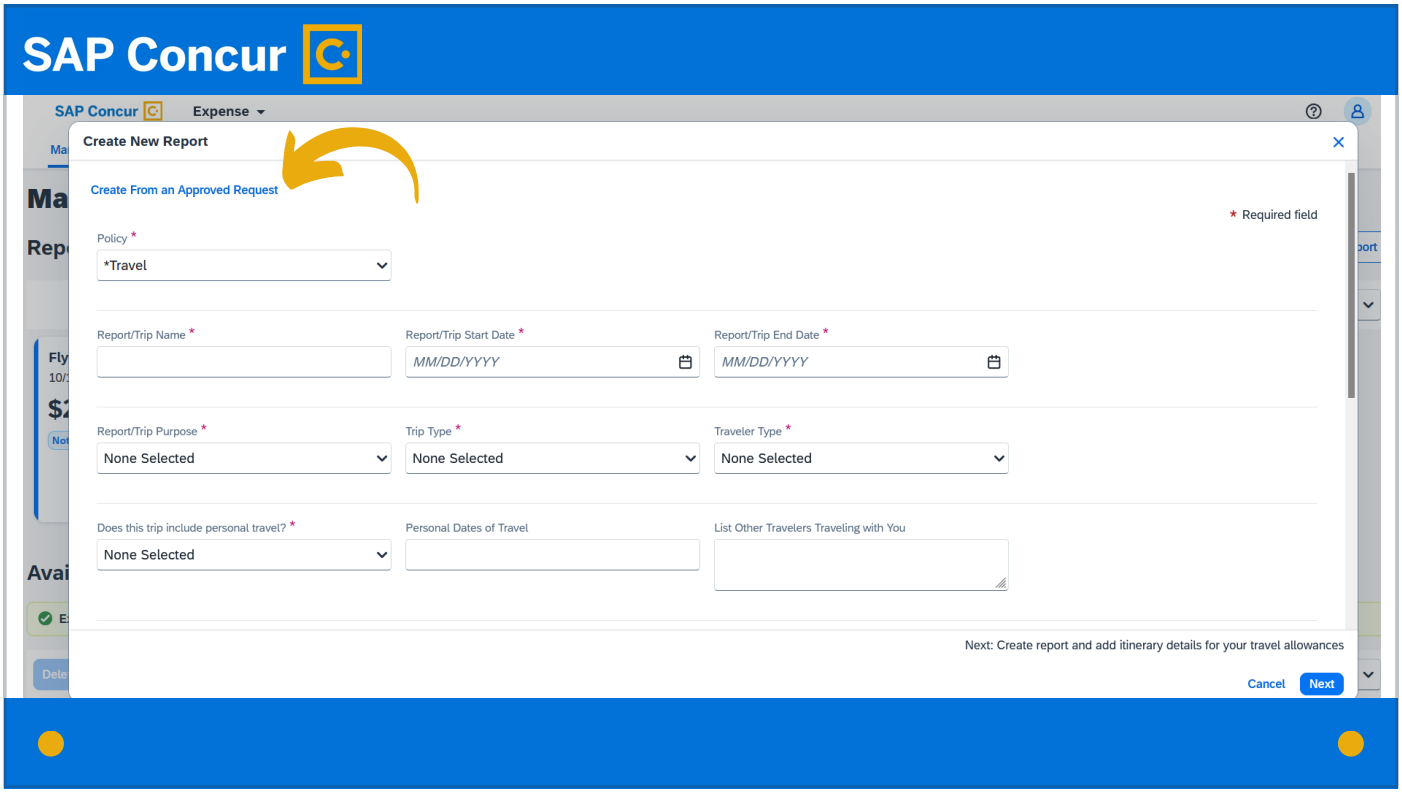
You will see a screen that looks like this.



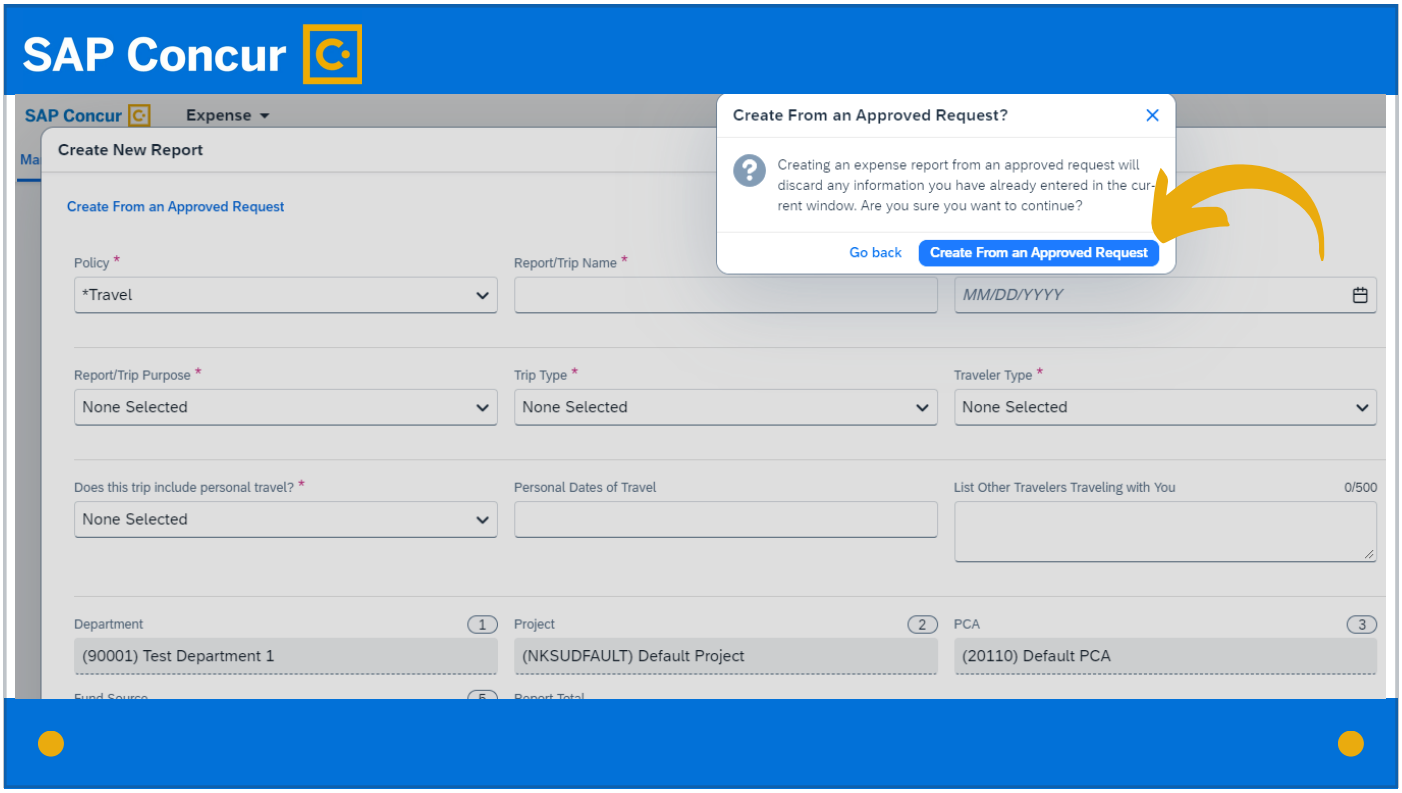
Concur refers to the details on this screen as the report header.



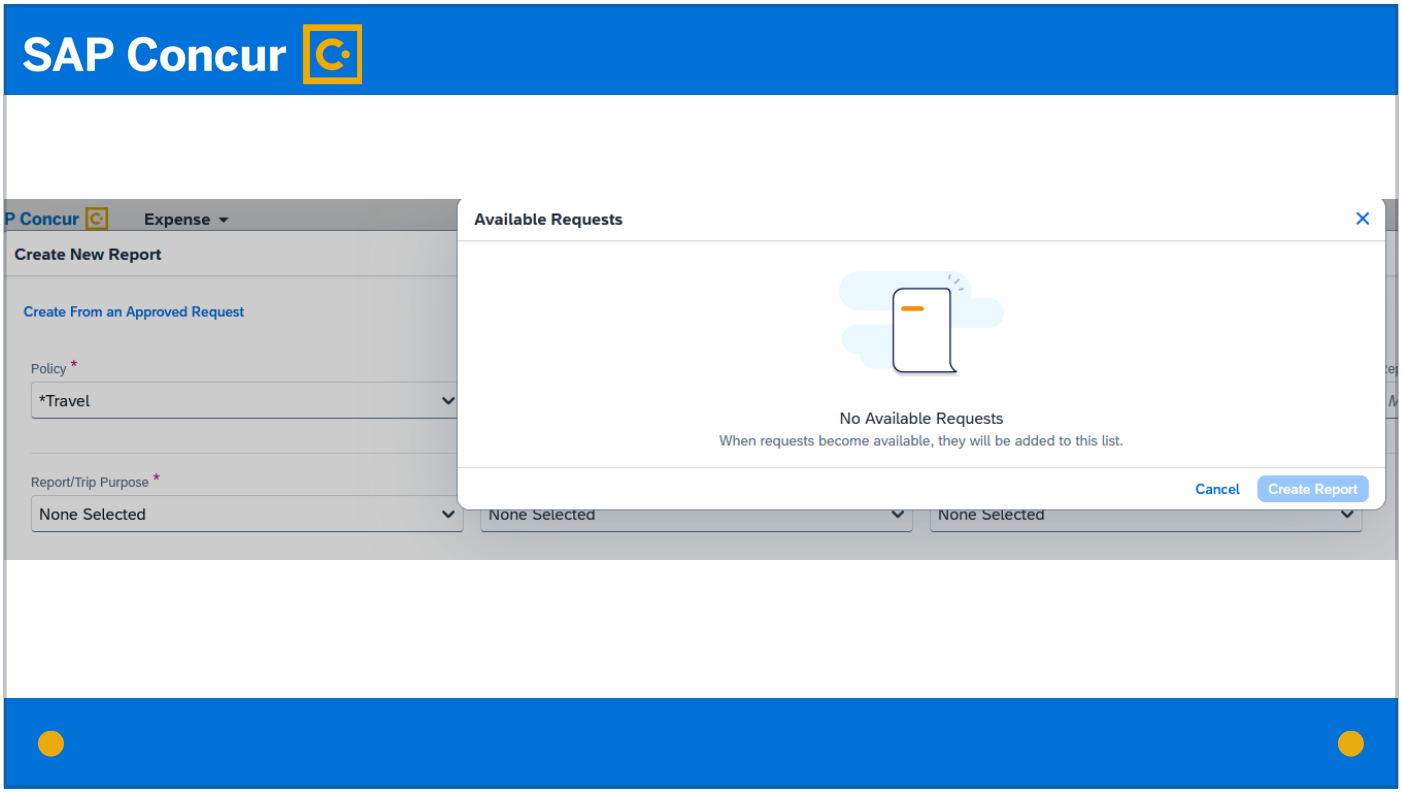
You can always get back to the report header screen to view or edit these details by clicking on the Report Details dropdown menu.



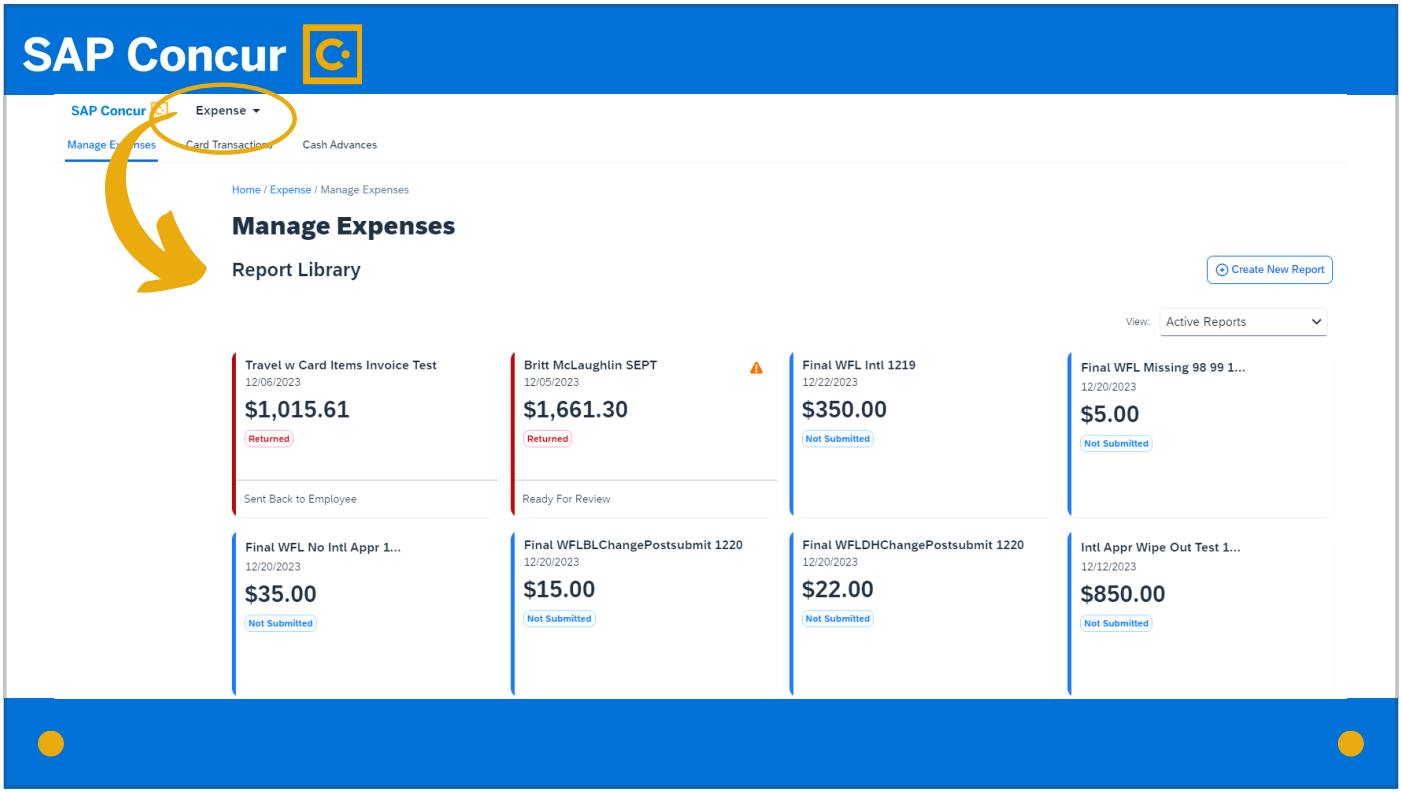
Because the report required an approved request prior to travel, you can create the travel expense report from that approved travel request by clicking on the blue Create from an Approved Request link at the top left of the screen.



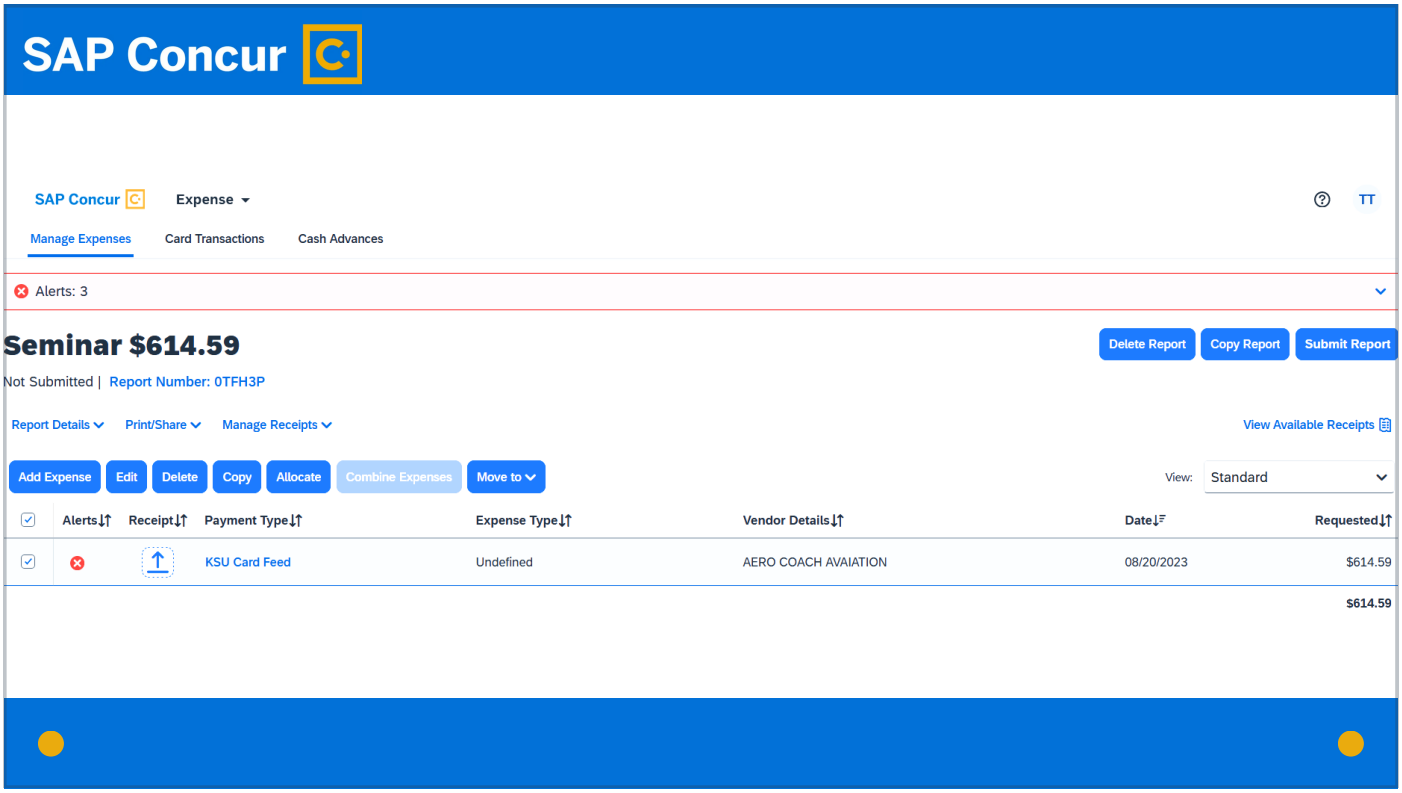
a window will appear to inform you that creating the report from the approved travel request will discard any information entered on the report header screen so far. Confirm that you want to continue by clicking the Create from an Approved Request button.



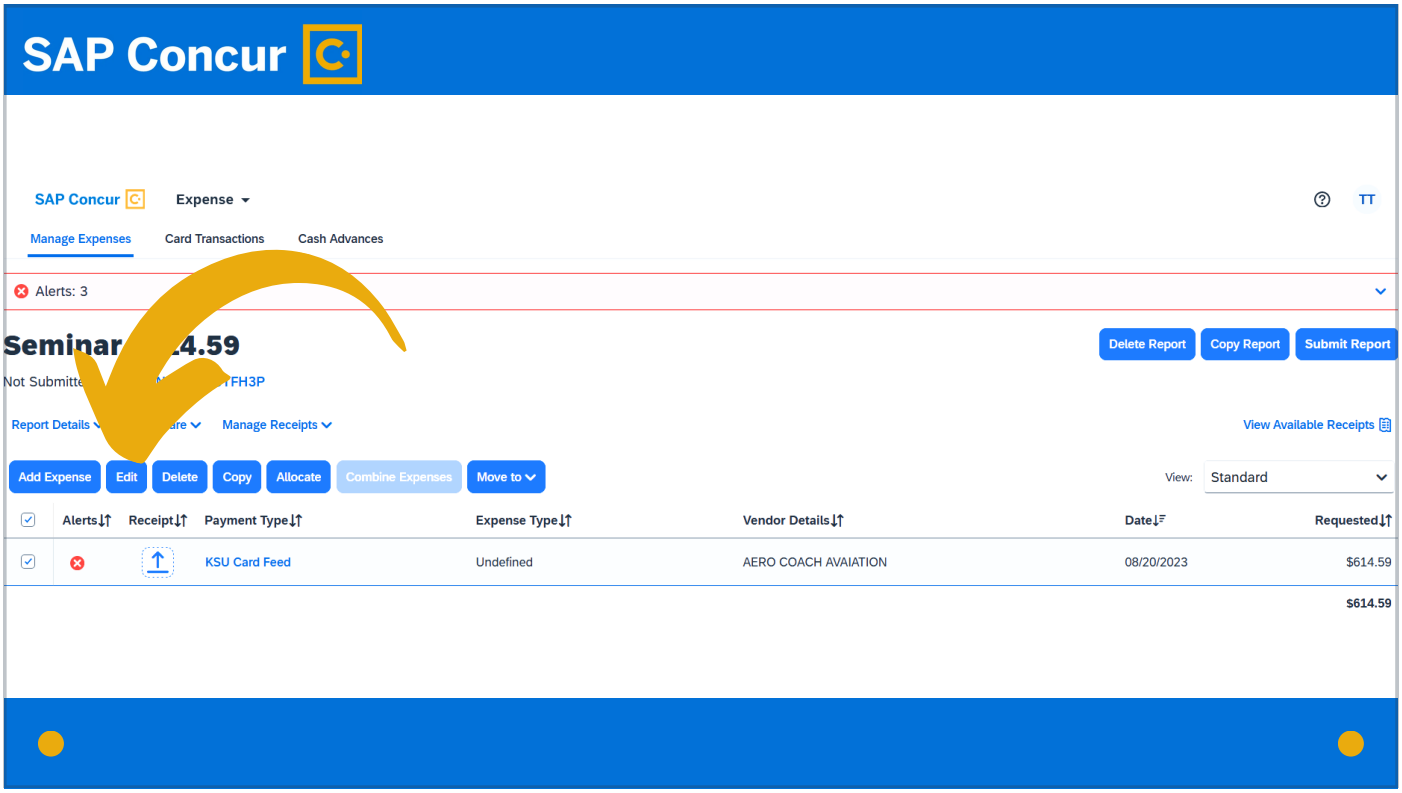
If you get a message that no approved requests are available to you,



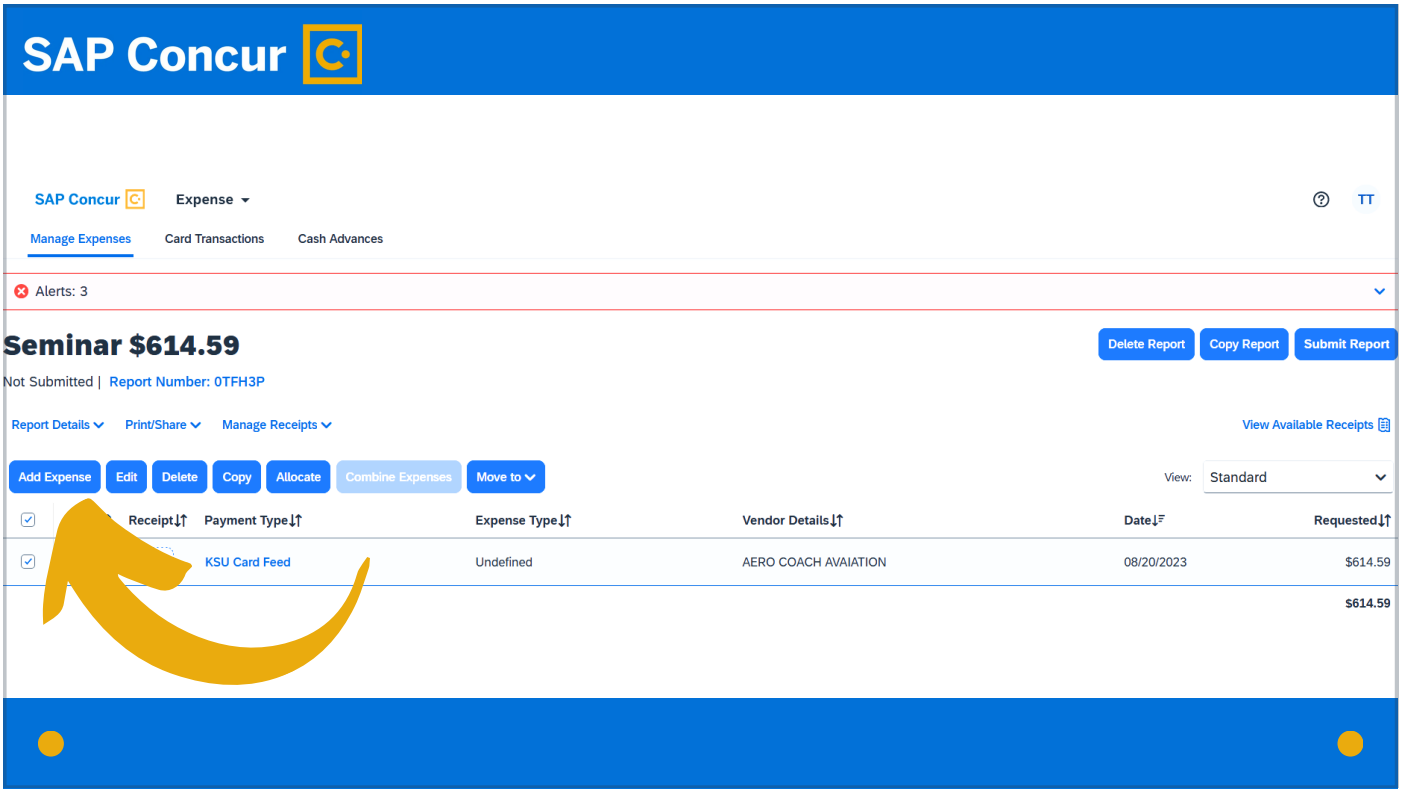
check your Report Library under the Expense page. The report may have automatically generated upon the request's approval if the travel dates fell within an immediate time period. If so, click on the report from there to open it.



You will see a screen that will allow you to manage the report.



You can select any expenses pulled into the report from the travel request to edit them



or add new expenses to the report.