

Expense Reports:

Creating Travel Expense Reports

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,

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Available Expenses



Create New Expense

Search for an expense type

01. Travel Expenses

Hotel

Meal Per Diem Reduction

Travel Registration Paid on other University Card

Travel-Related Training & Conference Registration

02. Transportation, Parking & Tolls

Airfare

Airline Fees

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:

Request/Trip Purpose *

3) Research

5) Faculty Led Study Abroad

6) Student or Faculty Recruiting

7) Donor/Alumni Relations

8) In-State Mileage (Parking/Tolls)

9) Other



8) In-State Mileage (Parking/Tolls)

Monthly in-state-mileage reports

Report/Trip Purpose *

1) Conference Attendee

1) Conference Attendee

2) Meeting

3) Research

4) Workshop/Seminar/Training

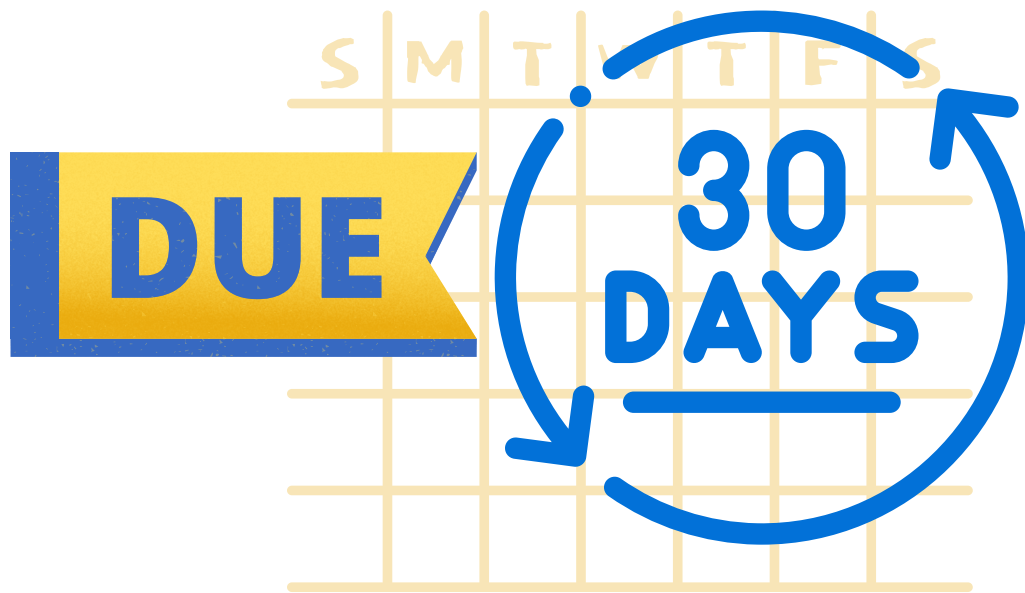
5) Faculty Led Study Abroad

6) Student or Faculty Recruiting

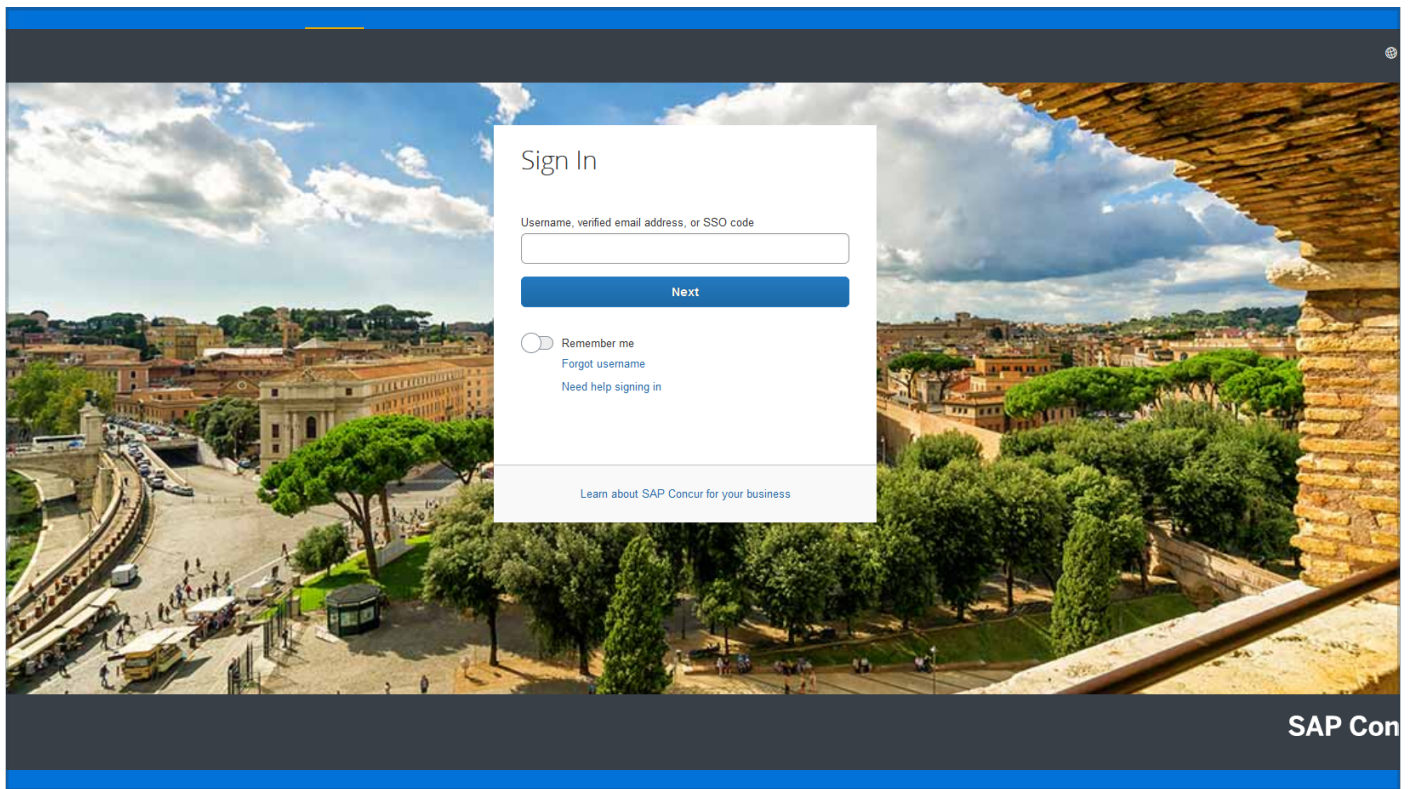
7) Donor/Alumni Relations

9) Other

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.

SAP Concur



SAP Concur

Home



+

Start a Request

+

Start a Report

02

Required Approvals

00

Authorization Requests

00

Available Expenses

00

Open Reports

Company Notes

Deployment Toolkit

You can access the deployment toolkit using this link .

Concur Training Toolkit

This link will provide information to utilise the Concur Expense System.

My Tasks

02

Required Approvals

Nick T. | Europe Travel Request

\$3,000.00 — Travel


Stacy T. | Red Stapler

\$15.00 — Expense

00

Available Expenses


You currently have no available expenses.



00

Open Reports

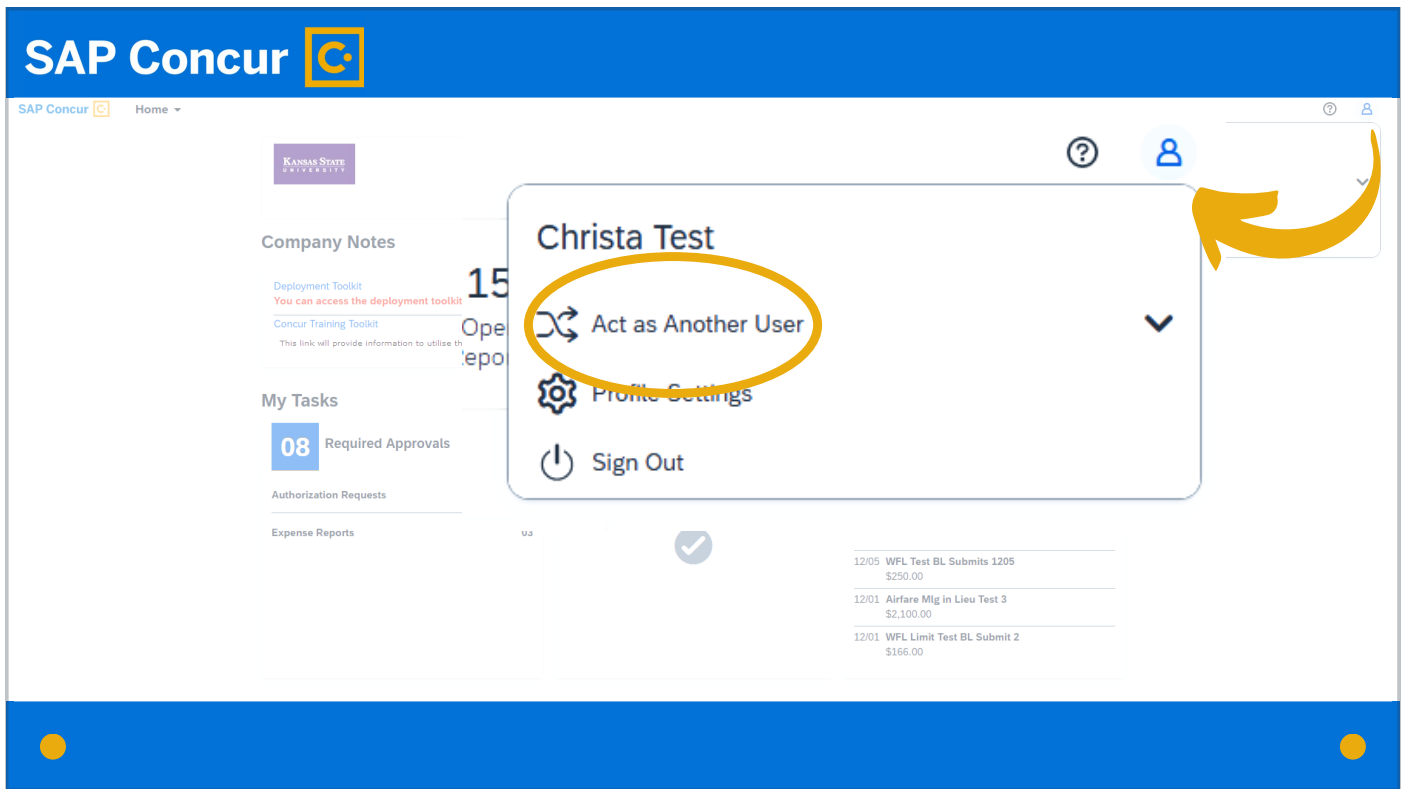
You currently have no open reports.



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


Video: Creating Travel Expense Reports

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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.

SAP Concur



SAP Concur

Home



+

Start a Request

+

Start a Report

02

Required Approvals

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Authorization Requests

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My Tasks

02

Required Approvals

Nick T. | Europe Travel Request

\$3,000.00 — Travel


Stacy T. | Red Stapler

\$15.00 — Expense

00

Available Expenses


You currently have no available expenses.



00

Open Reports

You currently have no open reports.



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

SAP Concur

Expense

?

Create New Report

Create From an Approved Request

Policy *

*Travel

Report/Trip Name *

Report/Trip Start Date *

Report/Trip End Date *

Report/Trip Purpose *

Trip Type *

Traveler Type *

Does this trip include personal travel? *

Personal Dates of Travel

List Other Travelers Traveling with You

Next: Create report and add itinerary details for your travel allowances

CancelNext

You will see a screen that looks like this.

SAP Concur

Expense

Create New Report

Create From an Approved Request

Policy *

*Travel

Report/Trip Name *

Report/Trip Start Date *

MM/DD/YYYY

Report/Trip End Date *

MM/DD/YYYY

Report/Trip Purpose *

None Selected

Trip Type *

None Selected

Traveler Type *

None Selected

Does this trip include personal travel? *

None Selected

Personal Dates of Travel

List Other Travelers Traveling with You

Next: Create report and add itinerary details for your travel allowances

CancelNext

Terminology:
report header

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

SAP Concur

Expense

Manage Expenses

Card Transactions

Cash Advances

September 2023

Expense

Manager Approval

Report Number: O6VDQS

Report

Report Header

Report Totals

Report Timeline

Audit Trail

Allocation Summary

Linked Add-ons

Manage Requests

Manage Cash Advances

Report Details

Print/Share

Manage Receipts

Approved

\$32.75

Requesting

\$(89.74)

View: Standard

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
	Out of Pocket	Personal Car Mileage		09/04/2023	\$43.23	\$43.23
	Out of Pocket	Hotel	Holiday Inn Hays, Kansas	09/02/2023	\$115.00	\$115.00 Itemized
	Out of Pocket	Personal Car Mileage		09/01/2023	\$79.26	\$79.26
					\$237.49	\$237.49

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

Video: Creating Travel Expense Reports

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SAP Concur Expense

Create New Report

Create From an Approved Request

* Required field

Policy *
*Travel

Report/Trip Name *
Report/Trip Start Date *
MM/DD/YYYY
Report/Trip End Date *
MM/DD/YYYY

Report/Trip Purpose *
None Selected
Trip Type *
None Selected
Traveler Type *
None Selected

Does this trip include personal travel? *
None Selected
Personal Dates of Travel
List Other Travelers Traveling with You

Next: Create report and add itinerary details for your travel allowances

Cancel Next

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.

The screenshot shows the SAP Concur 'Create New Report' interface. At the top, there's a blue header with the SAP Concur logo and a navigation bar with 'SAP Concur' and 'Expense'. The main title is 'Create New Report'. Below it, a sub-header reads 'Create From an Approved Request'. The form contains several fields: 'Policy' (set to '*Travel'), 'Report/Trip Name' (empty), 'Report/Trip Purpose' (set to 'None Selected'), 'Trip Type' (set to 'None Selected'), 'Traveler Type' (set to 'None Selected'), 'Does this trip include personal travel?' (set to 'None Selected'), 'Personal Dates of Travel' (empty), and 'List Other Travelers Traveling with You' (empty). At the bottom, there are three numbered sections: (1) Department (set to '(90001) Test Department 1'), (2) Project (set to '(NKSUDFAULT) Default Project'), and (3) PCA (set to '(20110) Default PCA'). A confirmation dialog box is overlaid on the right side, titled 'Create From an Approved Request?'. It contains a question mark icon and the text: 'Creating an expense report from an approved request will discard any information you have already entered in the current window. Are you sure you want to continue?'. The dialog has two buttons: 'Go back' and 'Create From an Approved Request'. A yellow arrow points from the 'Create From an Approved Request' button in the dialog to the 'Create From an Approved Request' button in the main form header.

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.

Concur

Expense


Create New Report

Create From an Approved Request

Policy*
*Travel

Report/Trip Purpose*
None Selected

Available Requests



No Available Requests
When requests become available, they will be added to this list.

CancelCreate Report


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

The screenshot shows the SAP Concur 'Manage Expenses' page. At the top, the 'Expense' dropdown menu is highlighted with a yellow circle and an arrow pointing to the 'Report Library' section. The page displays a grid of eight expense reports, each with a title, date, amount, and status.

Report Title	Date	Amount	Status
Travel w Card Items Invoice Test	12/06/2023	\$1,015.61	Returned
Britt McLaughlin SEPT	12/05/2023	\$1,661.30	Returned
Final WFL Intl 1219	12/22/2023	\$350.00	Not Submitted
Final WFL Missing 98 99 1...	12/20/2023	\$5.00	Not Submitted
Final WFL No Intl Apr 1...	12/20/2023	\$35.00	Not Submitted
Final WFLBLChangePostsubmit 1220	12/20/2023	\$15.00	Not Submitted
Final WFLDHChangePostsubmit 1220	12/20/2023	\$22.00	Not Submitted
Intl Aprr Wipe Out Test 1...	12/12/2023	\$850.00	Not Submitted

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.

SAP Concur



SAP Concur

Expense

Manage ExpensesCard TransactionsCash Advances

Alerts: 3

Seminar \$614.59



Not Submitted | Report Number: 0TFH3P

Report DetailsPrint/ShareManage Receipts

View Available Receipts

Add ExpenseEditDeleteCopyAllocateCombine ExpensesMove to

View: Standard

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			KSU Card Feed	Undefined	AERO COACH AVAIATION	08/20/2023	\$614.59
							\$614.59

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

SAP Concur

Expense

Manage Expenses

Card Transactions

Cash Advances

Alerts: 3

Seminar

4.59

Not Submitted

FH3P

Report Details

Manage Receipts

View Available Receipts

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

View: Standard

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			KSU Card Feed	Undefined	AERO COACH AVAATION	08/20/2023	\$614.59
							\$614.59

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

Alerts: 3

Seminar \$614.59

[Delete Report](#) [Copy Report](#) [Submit Report](#)

Not Submitted | Report Number: 0TFH3P

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾

[View Available Receipts](#) 

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#) ▾

View: [Standard](#) ▾

<input checked="" type="checkbox"/>	Receipt↑	Payment Type↑	Expense Type↑	Vendor Details↑	Date↑	Requested↑
<input checked="" type="checkbox"/>		KSU Card Feed	Undefined	AERO COACH AVAIATION	08/20/2023	\$614.59
						\$614.59

or add new expenses to the report.