

## Creating and Submitting a Travel Expense Report



The Travel Expense Report can only be submitted upon return of a trip, and prior approval of the **Travel Request**.

1. Log on into Concur [www.concursolutions.com](http://www.concursolutions.com)
2. In the Concur home page click on the **Expense** tab, and select **New Expense Report**.



3. In the report header complete all the required fields (*marked with a red line on the left side of the field*).
4. Select the specific Travel Request number that relates to the Expense Report from the listing, and click the **Add** button.

### Request 333H

Request Name: test

Purpose: test

**Note:** Refer to the **Travel Request number**. The number was created when the travel request was submitted for approval. When submitting **ONLY** the **Personal Car Mileage** expense for local travel, there is no need to add a Travel Request number.

### Create a New Expense Report

**Report Header**

Report Name	Report Date	Policy	Business Purpose	Comment
<input type="text"/>	06/24/2014	Travel & Expense Policy	<input type="text"/>	<input type="text"/>

**Requests**

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

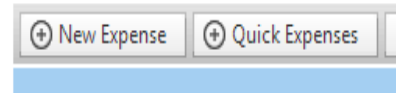
**Add** **Remove**

5. Click the **Next** button at the bottom of the page to continue.



- On the **Expenses** window, select the **New Expense** or the **Quick Expenses** tabs. Select the appropriate expense type, date, fill out all required fields and enter the amount for each expense until all the expenses have been added.

test



**New Expense** Receipt Store

Expense Type: Lunch | Transaction Date: | Business Purpose: test

Vendor Name: | City: | Payment Type: Cash/Out of Pocket

Amount: | USD |  Personal Expense (do not reimburse) | Comment:

- A summary of all the expenses will be shown in the left hand side of the Expense report.

test Delete Report Submit Report

+ New Expense + Quick Expenses Import Details Receipts Print / Email

Expenses			
Date	Expense	Amount	Requested
06/24/2014	Lunch	\$10.00	\$10.00
TOTAL AMOUNT		\$10.00	
TOTAL REQUESTED			\$10.00

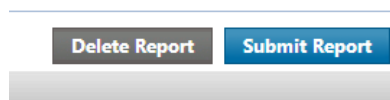
Expense Type: Lunch | Transaction Date: 06/24/2014 | Business Purpose: test

Vendor Name: | City: | Payment Type: Cash/Out of Pocket

Amount: 10.00 | USD |  Personal Expense (do not reimburse) | Comment: test

Save Itemize Allocate Attach Receipt Cancel

- Attach the required receipts and/or documents to the Expense Report. Clear up any exceptions, and click the **Submit Report** button for the approval process.



**Exceptions**

Expense	Date	Amount	Exception
Lunch	06/24/2014	\$25.00	Lunch limit is \$15.00 please adjust amount.

**Expenses** Move Delete Copy View

Date	Expense	Amount	Requested
Adding New Expense			
06/24/2014	Lunch	\$25.00	\$25.00