

CREATE AND SUBMIT AN EXPENSE REPORT

TRAVEL APPLICATION

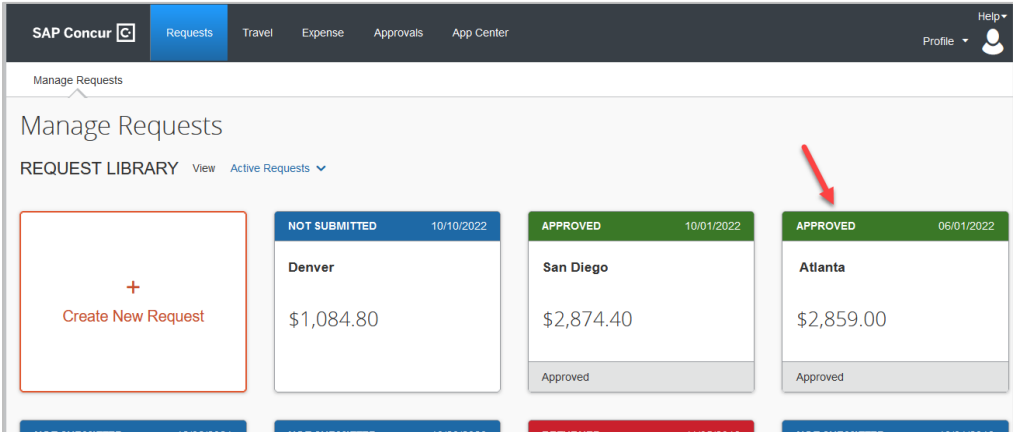
Expense

HELPFUL HINTS

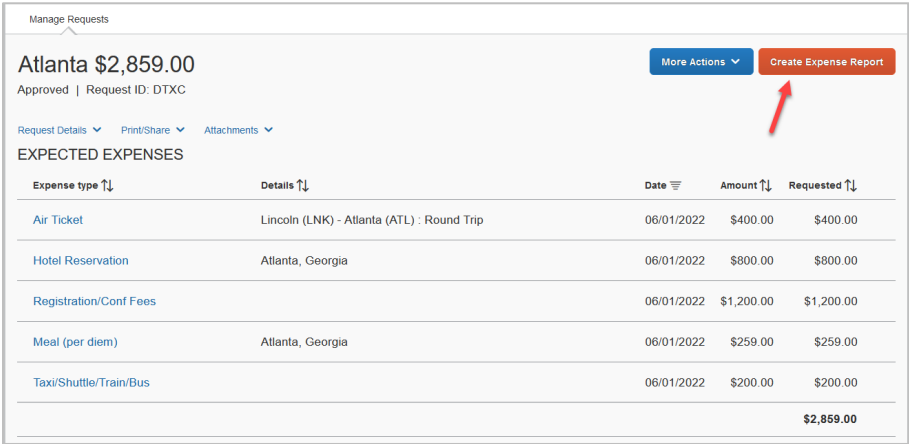
- Reimbursement for travel expenses which have a business purpose and are paid with personal funding sources are submitted through Concur expense and must include itemized receipts.
- Travel expenses cannot be submitted without an approved travel request (exception being a non-travel expense report).

PROCEDURE

From the request library in Concur, click on the approved travel request.



From the open travel request, click **Create Expense Report**.



CREATE AND SUBMIT AN EXPENSE REPORT

Updated August 24, 2022

A new expense report is generated.

Manage Expenses

Alerts: 1

Atlanta \$0.00 **Submit Report**

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST
Approved
\$2,859.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

No Expenses
Add expenses to this report to submit for reimbursement.

The alert indicates the report header needs to be updated with departure time and arrive time. Click on View to update the report header.

REPORT

The report header is missing data in this required field(s): Departure Time, Arrival Time [View](#)

Enter the departure time and arrive time, then scroll to the bottom of the page.

Report Header

Atlanta | \$0.00

Alerts: 1

Policy * Report Name * Report/Trip Purpose * * Required field

Trip Type * Does this trip include personal travel? * Personal Dates of Travel

Report/Trip Business Start Date * Report/Trip Business End Date *

Arrival Time *

Cancel **Save**

CREATE AND SUBMIT AN EXPENSE REPORT

If meals or lodging will be added to the expense report, select *Yes, I want to claim Travel Allowance*. Otherwise select *No* and move forward to add expenses.

Claim Travel Allowance

Expense reports containing meals or lodging require a daily Itinerary be created. Select 'Yes' if this expense report includes meals or lodging and you are ready to create an itinerary now. Select 'No' if meals or lodging will not be included on this report OR you wish to skip this step (and will access the itinerary screen at a later time).

Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

If yes, the travel allowances screen appears. Enter the outbound itinerary and click **Save**.

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Atlanta Selection: UNEB_TA_4

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Departure City: Lincoln, Nebraska

Date: 06/01/2022 Time: 5:00 AM

Arrival City: Atlanta, Georgia

Date: 06/01/2022 Time: 9:00 AM

Save

Go to Single Day Itineraries Next >> Cancel

Enter the return itinerary and click **Save**. Click **Next >>**.

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Atlanta Selection: UNEB_TA_4

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arrival Rate Location
Lincoln, Nebraska 06/01/2022 05:00 AM	Atlanta, Georgia 06/01/2022 09:00 AM	FULTON COUNTY, US-GA, US

New Itinerary Stop

Departure City: Atlanta, Georgia

Date: 06/05/2022 Time: 12:00 PM

Arrival City: Lincoln, Nebraska

Date: 06/05/2022 Time: 9:00 PM

Save

Go to Single Day Itineraries Next >> Cancel

CREATE AND SUBMIT AN EXPENSE REPORT

Click [Next >>](#).

Travel Allowances For Report: Atlanta

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Atlanta				
Lincoln, Nebraska	06/01/2022 05:00 AM	Atlanta, Georgia	06/01/2022 09:00 AM	FULTON COUNTY, US-GA, US
Atlanta, Georgia	06/05/2022 12:00 PM	Lincoln, Nebraska	06/05/2022 09:00 PM	LANCASTER COUNTY, US-NE, US

Available Itineraries

Current Itineraries [v] Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous Next >>

Where applicable, check the box for any meals that were provided by a third-party source (conference, hotel, etc.) during the trip. Note: the meal per diem allowance will decrease as checkboxes are selected. Once completed, click [Create Expenses](#).

Travel Allowances For Report: Atlanta

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from [] to [] Go

Exclude | All


	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	06/01/2022 Atlanta, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.85
<input type="checkbox"/>	06/02/2022 Atlanta, Georgia	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$27.30
<input type="checkbox"/>	06/03/2022 Atlanta, Georgia	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$27.30
<input type="checkbox"/>	06/04/2022 Atlanta, Georgia	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$39.90
<input type="checkbox"/>	06/05/2022 Atlanta, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.85

<< Previous Create Expenses Cancel

The meals (per diem) populate automatically. Continue building the expense report by clicking [Add Expense](#).

CREATE AND SUBMIT AN EXPENSE REPORT

Updated August 24, 2022

Atlanta \$172.20  Copy Report Submit Report

Not Submitted

Report Details ▼ Print/Share ▼ Manage Receipts ▼ Travel Allowance ▼

REQUEST

Approved

\$2,859.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▼ View: Standard ▼

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
<input type="checkbox"/>		Cash/Personal Funds	Meal (per diem)	Atlanta, Georgia	06/05/2022	\$38.85
<input type="checkbox"/>		Cash/Personal Funds	Meal (per diem)	Atlanta, Georgia	06/04/2022	\$39.90
<input type="checkbox"/>		Cash/Personal Funds	Meal (per diem)	Atlanta, Georgia	06/03/2022	\$27.30
<input type="checkbox"/>		Cash/Personal Funds	Meal (per diem)	Atlanta, Georgia	06/02/2022	\$27.30
<input type="checkbox"/>		Cash/Personal Funds	Meal (per diem)	Atlanta, Georgia	06/01/2022	\$38.85

Select an expense type from the **Create New Expense** list. If a traveler has an available expense (e.g., submitted via Concur app), it will be listed under **Available Expenses**.

Add Expense ✕

0

Available Expenses

+

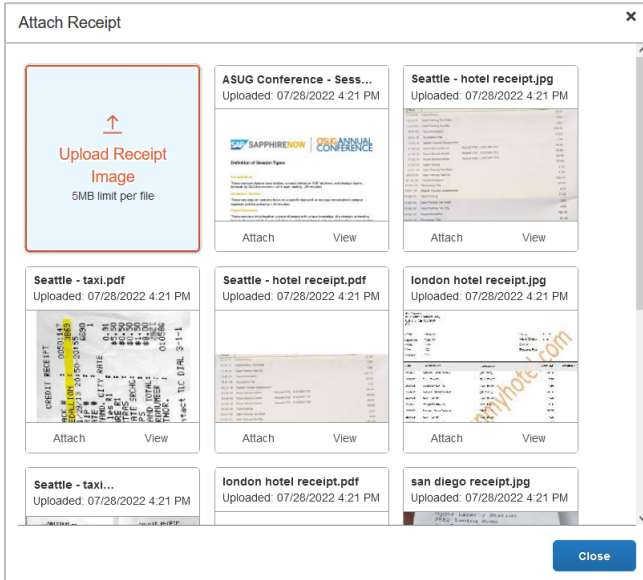
Create New Expense

Search for an expense type

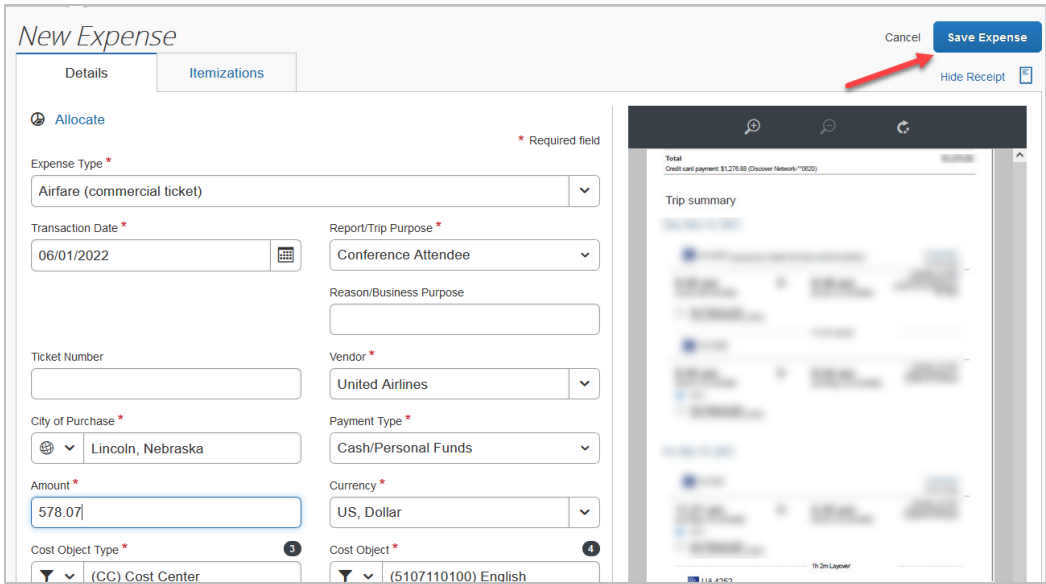
- ^ **01. Transportation**
 - Airfare (commercial ticket)
 - Bus Rental
 - Car Rental
 - Fuel/Gas
 - Plane (state/private/rented/chartered)
 - Taxi/Shuttle/Train/Bus
- ^ **02. Travel Expenses**
 - Lodging

CREATE AND SUBMIT AN EXPENSE REPORT

Enter the required information, including the receipt image where applicable. To upload a receipt image, click **Upload Receipt Image**. Select from the available receipts or search for a file.



When complete, click **Save Expense**.

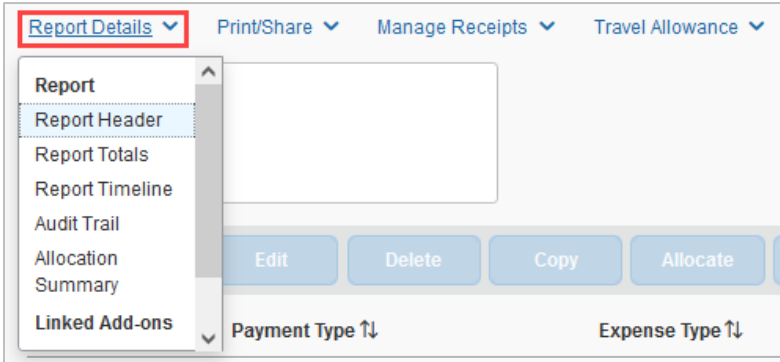


Continue building the expense report by clicking **Add Expense**.

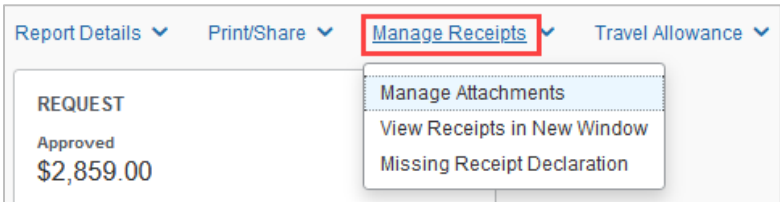
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Available options from the expense screen include:

- **Report Details:** to view/update report header, view totals, audit trail, or allocation summary.



- **Print/Share:** to print the detailed expense report or the audit trail report.
- **Manage receipts:** view receipts or create a missing receipt affidavit (*only employee can create*).



- **Travel Allowance:** to view or update the available itinerary or expenses & adjustments.

Once the report is complete, click **Submit Report**.

