Concur – Create and Submit a Travel Expense Report without a Request

Procedures to create and submit a travel expense report when a travel request was not previously submitted and approved.

Procedures

From the Concur launch page, click on the Start a Report tab.
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The Create New Report screen will open.

Complete the required fields. Required fields are marked by a red (*).

Be sure to scroll down to view all fields on the Create New Report Screen.

Complete the required fields with the travel information.

The following Create New Report fields are required:

- **Policy**: To create a Concur Travel Expense Report, choose the General Travel Policy
- **Trip Name**: The Trip Name should be the last date of the trip and the business destination. (i.e. 06/15/20-Austin)
- **Trip Start Date**: First date of the trip.
- **Trip End Date**: Last date of the trip.
- **Business Destination**: Enter the primary business destination of the trip.
- **Trip Purpose**: Choose the correct trip purpose from the dropdown menu.
- **Trip Type**: Choose Domestic or International from the dropdown menu.
- **Traveler Type**: Choose the correct traveler type from the dropdown menu.
- **Does this trip include personal travel?**: Choose No or Yes from the dropdown menu.
- **Personal Dates of Travel**: This field will become mandatory if Yes is selected on the previous field. Include the dates of the personal travel included with the business trip.
- **Cost Object Type**: Choose Cost Center, WBS, Fund or Internal Order.
- **Cost Object ID**: Enter the appropriate cost object for the report header.
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- **Fund**: The fund will be required if a cost share WBS element was entered in the Cost Object ID field. Choose an allowable fund. Otherwise, leave this field blank.

Other fields that may need to be populated but are not required by Concur on the Report Header:

- **Additional Information**: Enter the business purpose for the travel expense report.
- **Related Request/Expense Report**: If other expenses related to this travel are on another expense report, it is optional to use this field to track those expenses for future reporting.
- **Statistical Order**: Enter the appropriate statistical internal order for this travel expense report.
- **Comments To/From Approver/Processor**: Add any additional comments or explanations necessary for the review/approval of this travel expense report.
- **Claim Travel Allowance**: If meal per diem need to be paid for this report, be certain to select the radio button for “Yes, I want to Claim Travel Allowance”.

To claim meal per diem, click the radio button for “Yes, I want to Claim Travel Allowance”.

Click Next.
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Concur will open to the Travel Allowances for Report screen.

The default is to Create New Itinerary.

Enter the Departure City, Date and Time.
Enter the Arrival City, Date and Time.

**NOTE:** When searching for a city and state, the state abbreviation cannot be used.

Click SAVE.

Complete the itinerary by entering the data for the trip home.

Enter the Departure City, Date and Time.
Enter the Arrival City, Date and Time.

Click Save.
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The itinerary information will be displayed and can be modified if changes are needed.

Click Next.

The Travel Allowances for Report will display the itinerary once again and allow for the itinerary to be edited. If the itinerary is correct, click Next.

The per diem allowance will be displayed for each day.
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Click for box for each meal provided and the per diem allowance will be reduced for those meals.

Click Create Expenses.

The travel expense report will be created and populated with the daily per diem allowances.

Add additional expenses to the report by clicking Add Expense.
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**The Add Expense window will appear.**

The Available Expenses tab contains transactions on your own procard that are pending allocation and review on a report.

To add a procard transaction(s), click the check box next to each transaction to be added to the travel expense report.

Click Add to Report.

**The procard transaction(s) has now been added to the report.**

To review the expense information, click on the Expense Type of the transaction.
<table>
<thead>
<tr>
<th>Concur will display the transaction Details tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and modify the data in all fields if necessary. Be certain all fields denoted with a red (*) are populated.</td>
</tr>
<tr>
<td>Add Additional Information or Comments to provide the business purpose of the transaction.</td>
</tr>
<tr>
<td>Click on Allocate to review/modify the allocation for this expense.</td>
</tr>
<tr>
<td>The Allocate window will open.</td>
</tr>
<tr>
<td>Expenses can be allocated by Percent or Amount. Click the correct option for the allocation.</td>
</tr>
<tr>
<td>Click Add to add a new allocation.</td>
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On the Add Allocation window, select the Cost Object Type and Cost Object ID for the new allocation.

Click Add to List.

Add the allocation percentage or amount to the new allocation. Tab out of the field to see the allocation calculate.

Click Save.
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Concur will return to the expense Details tab.

Next, add an attachment by clicking on the red (+) Attach Receipt Image.

The Attach Receipt window will appear.

If any receipts have already been uploaded to Concur they will appear. Otherwise, click on Upload Receipt Image to upload an attachment from your computer.
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The file upload window will appear. Locate the file on your computer, click on the file and click Open.

The Attach Receipt screen will appear while Concur is uploading the receipt and saving it to the transaction.
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Once the attachment is uploaded, the file will open. Review to be certain the correct attachment was added to the expense.

Close the file by clicking on the X in the top right corner.
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The attachment is now saved to the expense.

If the wrong file was uploaded, click Detach and repeat the attachment process, selecting the correct file.

When the expense information is complete and correct, click Save Expense.

Concur will return to the expense report.

To add another expense, click Add Expense.
The Add Expense window will appear.

To add an expense that was not charged to the traveler’s procard, click on the Create New Expense tab.

Click in the Search for an Expense Type field or scroll down to search for the Expense Type to be added.

Click on the Expense Type.
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The New Expense will open to the expense Details tab.

Be sure to review and complete all required fields.

NOTE: Many fields will autocomplete from the report header. Other fields such as Transaction Date, Vendor Name, Payment Type, Amount and Currency are transaction specific and will need to be completed for each expense not charged to the procard.

The business purpose needs to be added to the Additional Information field or the Comment field.
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For Payment Type, be certain to choose the correct payment from the dropdown menu.

NOTE: Payment Type AG-Paid by County should only be used by the AG Extension Agents for expenses charged to the county credit cards.

Once all of the expense Details fields have been completed, add the attachment.

As before, add an attachment by clicking on the red (+) Attach Receipt Image.
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**Quick Reference Card – Concur**

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<td>When complete, review the expense report to ensure all expenses are complete and accurate.</td>
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| To review the Report Header data and expense data on one file, click on Print/Share and UK-Detailed Report. |

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![Image of Concur interface for creating and submitting travel expense reports.](image-url)
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Review the Employee details, report header information, and expenses including allocations.

Review the Expense Type Summary, Allocation Summary, and Report Totals sections for accuracy.
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Additional sections of the UK-Detailed Report that should be reviewed are the Approval Flow and Audit Trail.

Once the report is reviewed, click Close.
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Once the report is reviewed and ready to be submitted for approval, click Submit Report.

The User Electronic Agreement will appear. Read the agreement and click Accept and Continue.
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The Report Totals screen will appear. Review the totals for accuracy.

Click Submit Report.
**Concur – Create and Submit a Travel Expense Report without a Request**

The Report Status window will appear and confirm the report has been submitted.

Click Close.

Concur will return to the Manage Expenses Report Library.

The report will show as Submitted and show the current status in workflow.

Continue creating expenses report, correcting reports that may have been returned, or sign out if finished.