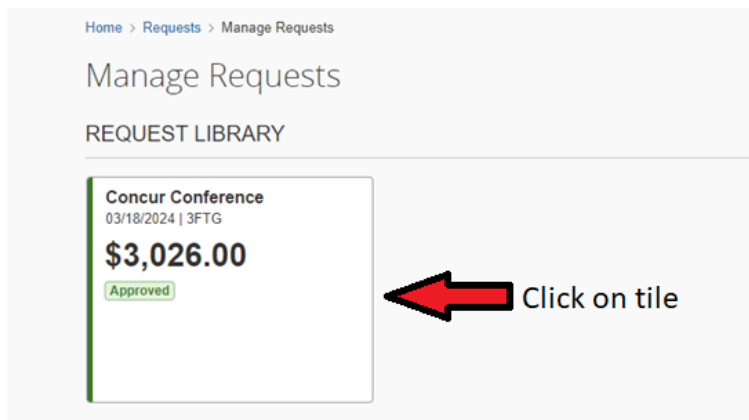


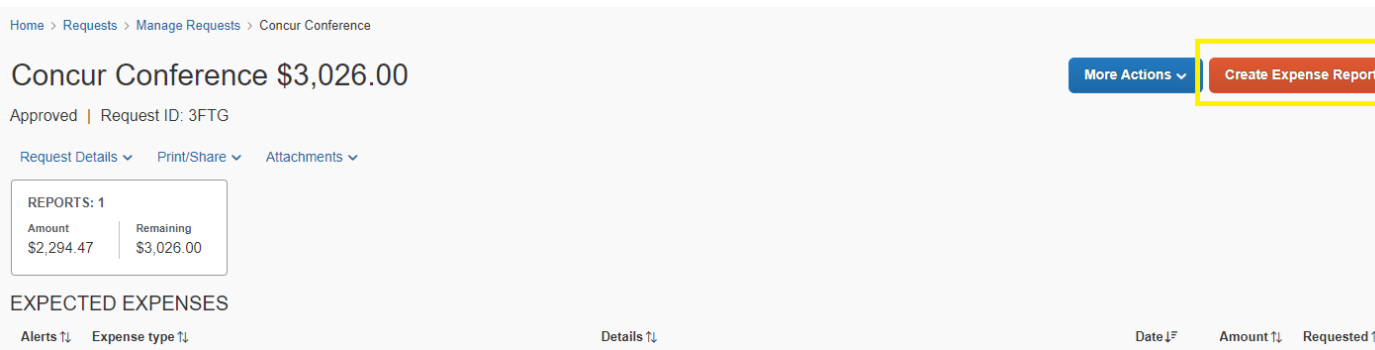
CREATING AN EXPENSE REPORT FROM AN APPROVED REQUEST

Effective fall 2023, employees are required to create travel Requests in Concur for all overnight travel by an employee. The travel request must be approved in Concur before an employee can submit a travel expense report in Concur. *NOTE: Reimbursements are NOT made from an approved Request, employees MUST submit an Expense Report in Concur to be reimbursed.* Transactions made using TCU issued travel cards must also be actioned by creating an expense report from the approved request.

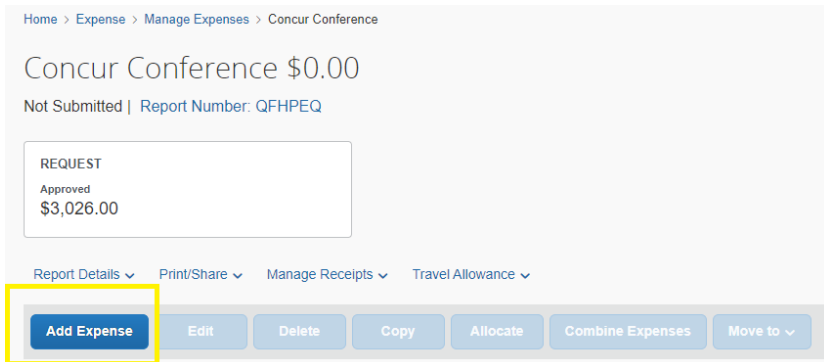
To create an expense report from an approved request, locate the approved request from the Manage Requests library in Concur, and click into the tile:



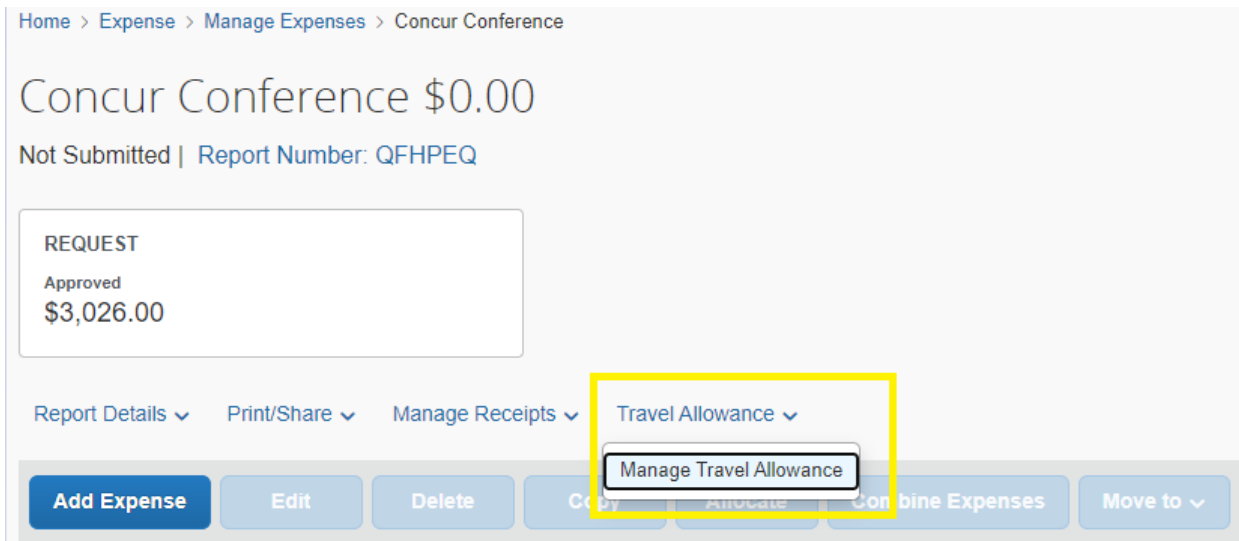
Click on the Create Expense Report button to create an expense report:



Click Add Expense to add all expenses incurred (personal paid, TCU Travel or Air Card). Select the Available Expenses tab to action TCU travel card transactions. Select the Create New Expense tab to add transactions paid by personal credit cards. Search for expense type(s) and complete required fields.



To add Domestic Per Diem, after adding all other incurred expenses, locate the Travel Allowance dropdown, and select Manage Travel Allowance:



Create itinerary – Required for domestic per diem

Travel Booked Through Anthony Travel or Concur Travel

If you booked travel through Anthony Travel or Concur Travel, you can import your itinerary:

Click on the **Create new Itinerary** tab, select **Import Itinerary** and check the applicable itinerary and **Import**

Travel Allowances For Report: Concur Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time↑≡	Arrival City
No Assigned Itineraries Found		

Travel Allowances For Report: Concur Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments


Itinerary Info

Itinerary Name
Concur Conference

Add Stop Delete Rows **Import Itinerary**

<input type="checkbox"/>	Departure City↑≡	Arrival City
No Itinerary Rows Found		

Select trips and charges to use to create this itinerary X

<input type="checkbox"/>	Description	Start Date↑≡	End Date
<input checked="" type="checkbox"/> 	Trip from Dallas to Las Vegas (IEGWGP)	03/18/2024 02:5...	03/21/2024 09:3...

Your itinerary will display, click **Next** (not Save) *twice*

Itinerary Info

Itinerary Name

<input type="checkbox"/>	Departure City↑≡	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Dallas, Texas 03/18/2024 02:53 PM	Las Vegas, Nevada 03/18/2024 03:54 PM	CLARK COUNTY, US-NV, US
<input type="checkbox"/>	Las Vegas, Nevada 03/21/2024 04:49 PM	Dallas, Texas 03/21/2024 09:34 PM	DALLAS COUNTY, US-TX, US

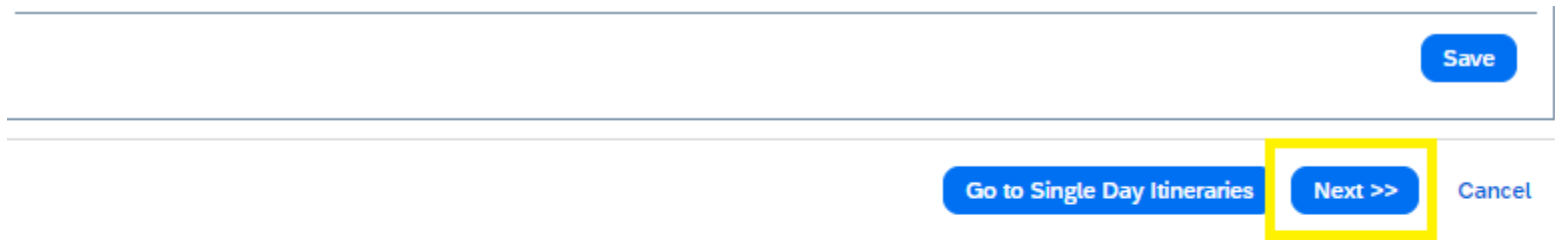
New Itinerary Stop

Departure City

Date Time

Arrival City

Date Time



Users need to click Next twice

Move to page 8 for discussion regarding deselecting meals provided

Travel booked outside of Anthony Travel or Concur Travel

If you did not book travel through Anthony Travel or Concur Travel, you must create both **outgoing and return itinerary stops in order to request your full domestic per diem.**

To create the outgoing itinerary stop, select Create New Itinerary, and then complete the Itinerary Stops, hit **Save (DO NOT HIT Next)**. *You must enter the departure and arrival for each travel segment. In this example, the traveler went from Dallas, TX to Las Vegas, NV on 3/18/24. In the itinerary, users must enter Dallas, TX as the departure city, and Las Vegas, NV as the arrival city. You must add times, using AM and PM, however times do not need to be exact.*

- 1 Create New Itinerary
- 2 Available Itineraries
- 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Concur Conference

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
--------------------------	----------------	--------------	-----------------------

No Itinerary Rows Found

New Itinerary Stop

Departure City
Dallas, Texas

Date
03/18/2024

Time
5:00 PM

Arrival City
Las Vegas, Nevada

Date
03/18/2024

Time
7:00 PM

After hitting Save, Concur will prompt you for your return trip itinerary. You must populate the return itinerary stops, hit **Save (DO NOT HIT Next)**. You must enter the departure and arrival for each travel segment. In this example, the traveler went from Las Vegas, NV to Dallas, TX on 3/21/24. In the itinerary, users must enter Las Vegas, NV as the departure city and Dallas, TX as the arrival city. You must add times, using AM and PM, however times do not need to be exact.

- 1 Edit Itinerary
- 2 Available Itineraries
- 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Concur Conference

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Dallas, Texas 03/18/2024 05:00 PM	Las Vegas, Nevada 03/18/2024 07:00 PM	CLARK COUNTY, US-NV, US

New Itinerary Stop

Departure City
Las Vegas, Nevada

Date
03/21/2024

Time
5:00 PM

Arrival City
Dallas, Texas

Date
03/21/2024

Time
9:00 PM

After performing the above, you should have TWO itinerary lines and the lines must be under one trip (should look as follows):

Travel Allowances For Report: Concur Conference

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Concur Conference

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City ▲	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Dallas, Texas 03/18/2024 05:00 PM	Las Vegas, Nevada 03/18/2024 07:00 PM	CLARK COUNTY, US-NV, US
<input type="checkbox"/>	Las Vegas, Nevada 03/21/2024 05:00 PM	Dallas, Texas 03/21/2024 09:00 PM	DALLAS COUNTY, US-TX, US

NOTE: If your itinerary has two separate lines (see below), your per diem will not calculate correctly. Delete the lines and re-try based on the instructions above.

Travel Allowances For Report: Concur Conference

Create New Itinerary Available Itineraries Expenses & Adjustments

Assigned Itineraries

Edit Unassign

	Departure City	Date and Time ▲	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Concur Conference	Dallas, Texas	03/18/2024 05:00 PM	Las Vegas, Nevada	03/18/2024 05:00 PM	CLARK COUNTY, US-NV, US
Itinerary: Concur Conference	Las Vegas, Nevada	03/21/2024 05:00 PM	Dallas, Texas	03/21/2024 09:00 PM	DALLAS COUNTY, US-TX, US

Meals Provided - Employees must account for all provided meals, and reduce their per diem for provided meals. To reduce, click on the Expenses and Adjustments tab of the Itinerary, and click each meal provided. Meals clicked, will reduce the per diem. Once all provided meals have been selected, click Create Expenses

Travel Allowances For Report: Concur Conference □

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments 1

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	03/18/2024 Las Vegas, Nevada	\$51.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75
<input type="checkbox"/>	03/19/2024 Las Vegas, Nevada	\$69.00	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$36.00
<input type="checkbox"/>	03/20/2024 Las Vegas, Nevada	\$69.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$5.00
<input type="checkbox"/>	03/21/2024 Las Vegas, Nevada	\$51.75	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$18.75

Note: Due to IRS standards, travel day per diems are calculated at 75% of the daily rate. Daily rates are based on USGSA rates and are automatically determined in Concur based on the travel location. Users cannot change rates. Concur will not reduce a daily per diem amount to less than \$5 as the IRS considers \$5 of the per diem as incidentals, which is not reduced if meals are provided. In the case above, even though breakfast, lunch and dinner were provided, the traveler received \$5 for incidentals.

Once all expenses, including per diem have been added, clear any alerts identified by Concur, and select Submit Report:

Concur Conference \$2,405.97 Delete Report Copy Report **Submit Report**

Not Submitted | Report Number: 1SQFGE

REQUEST

Approved

\$3,026.00

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾ View Available Receipts □

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾