

# Concur – Creating a Travel Expense Report

For Concur Home Page and training resources: <http://www.uc.edu/af/travel/concur-training.html>

If you have or are going to travel overnight on behalf of the University of Cincinnati and need to be reimbursed for travel costs, you will need to create a Travel Expense Report in Concur. Below are the steps to do so for any Biological Sciences faculty or staff member.

1. Logon to your Concur profile here by using your UC logon credentials:  
<https://login.uc.edu/idp/profile/SAML2/Unsolicited/SSO?execution=e1s1>
2. From your home page, click “Requests” at the top left of the page.
3. This will bring you to your Travel Request report library. Find the Travel Request that you created before the dates of travel that has been approved, and click “Expense” at the end of the column.
  - a. You may be creating an Expense Report for items purchased before dates of travel. You are able to create multiple expense reports for the same travel. This would probably be in the situation of items purchased on a p-card months before travel that need to be allocated or airfare and registration charges that can be reimbursed before dates of travel.
4. An Expense Report will be created from the information you have already entered for your Travel Request. All the title page information should be filled in, including the account string and the Travel Request it is attached to. If any information has changed, update the required information.
5. Click “Next” at the bottom right of the page.
6. A box will automatically pop up asking “Are you traveling overnight and receiving per diem for meals?” If you will be requesting any food or meal costs, click YES. Concur will calculate your per diem amounts according to the information you provide in the Travel Allowances. Only per diem food rates can be claimed as food expenses in Concur. Enter in your Itinerary information to calculate your per diem rates. You can lower the per diem rates by clicking or unclicking the “Breakfast, Lunch, and Dinner Provided” boxes. You can also exclude an entire day of per diems to lower the cost as well.
7. Any expenses you purchased through Concur will be imported into your expense report. If you purchased items out of pocket for your travel, you will have to add them one at a time by clicking “New Expense” at the top left of the page under the title.
8. Choose the Expense Type of your item. Any item purchased for travel or during travel will be under the Expense Types of “01. Travel Expenses” or “02. Travel Expenses – Miscellaneous.”
9. Once you choose the Expense Type, there will be more information to provide. Please fill in the correct information in order for Concur to calculate the cost.
10. You will need to attach an itemized receipt for any expense over \$25.00. If you are charging these expenses to a grant, an itemized receipt is needed for ALL expenses. Click the “Attach Receipt” button at the bottom right of the page.
  - a. You can scan a receipt and upload it by clicking “browse.”
  - b. You can take a picture of the receipt with your phone and upload it later.
11. For any Lodging expenses, you will have to fill in the nightly rates as well as the overall total.
12. If individual expenses will be charged to a different fund than others, please include where to charge an expense in the comments box.

13. Once all your expenses are included in the Expense Report, and the total amount matches what you are requesting reimbursement for, you are ready to submit. You must be the one to submit any Expense Reports because this submission acts as your electronic signature.
14. You may receive yellow warning notifications asking you to allocate your expenses. This is referring to the account string information. Make sure your travel title page has the generic account string information entered below unless you know the account string of where your funds are coming from. The business manager will be able to enter the correct account string information from your comments once you submit.  
**Fund – A100001 Cost Center – 7150300000 Functional Area – 0 Grant – Not relevant**
15. To submit, click the orange “Submit” button at the top right of the screen.

**Next Steps:**

- After submission, your expense report will be sent to the cost object approver and then to Accounts Payable for reimbursement to you.
- **Please ask the Biology Department office if you have any questions about this process at 556-9700.**