

HOW TO CREATE A TRAVEL EXPENSE REPORT IN CONCUR

This guide demonstrates how to create and submit a Travel Expense Report in Concur. A Travel Expense Report is how you report actual costs of BU business travel to be reconciled and paid at the end of travel. Your expense report does not have to be submitted the same day it is created; you can work on your expense report over time and submit when you have returned from your trip and all expenses for that reporting period have been added to the report.

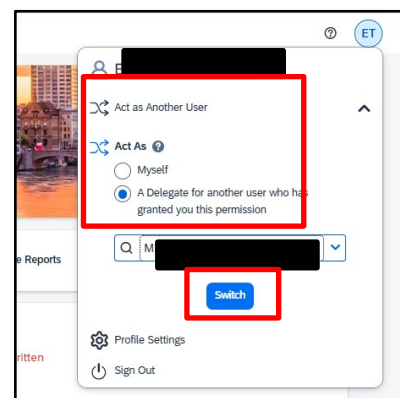
Users may create the **Travel Expense Report** either:

- from the approved Travel Request (recommended method as it carries over Request Header information)
- from the Expense module, attaching the applicable Travel Request to the Expense Report.

USERS & DELEGATES

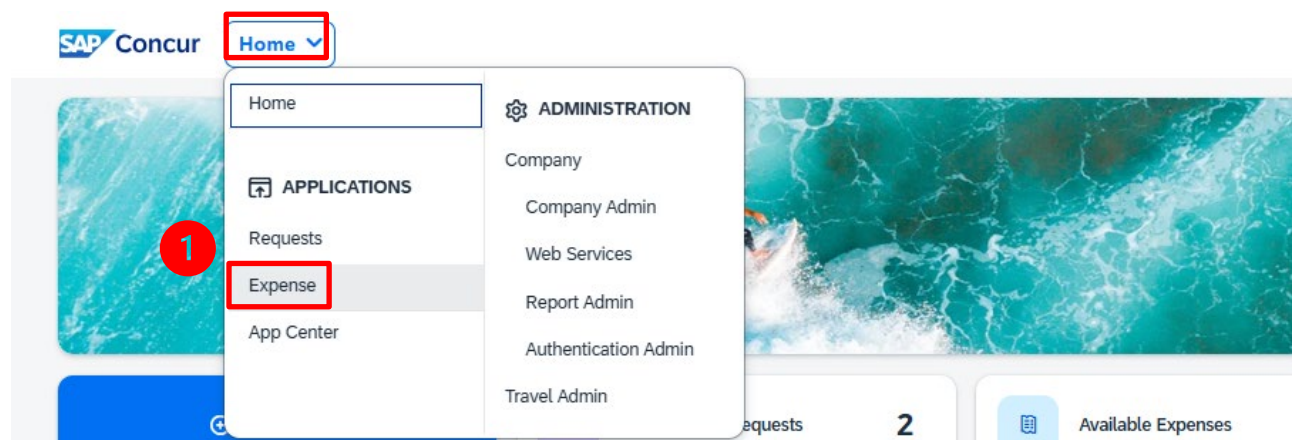
To prepare a report on a traveler's behalf as an **Expense Delegate**, follow the steps below to assign yourself as a Travel Arranger.

- Click the profile icon in the top right corner of the Concur home page and then select **"Act As Another User"**
- Choose option **"A Delegate for another user who has granted you this permission,"** enter the traveler's name and click **"Switch."**



STEPS TO CREATE A TRAVEL EXPENSE REPORT FOR ONESELF OR AS AN EXPENSE DELEGATE FOR ANOTHER TRAVELER:

1. Click the **"Home"** dropdown and select **"Expense."** Any BU Travel Card activity you have will display in the Available Expenses section.
2. Click **+ Create New Report**



3. Complete all required fields in the report header (indicated with a red asterisk).

- Report Name: Be as detailed as possible to make reports easily identifiable and recognizable among your records. Do not title your reports with your name or broad terms such as “Conference.”
- Trip Purpose: Select the most applicable option or choose “Other”
- Cost Object: Can be edited as needed. Any restricted account starting with a 9 should be preceded with two leading zeros (e.g., 009123456789).
- Start and End Dates: It is University policy that the expense report be submitted within 30 days of the trip end date
- ★ • **[NEW]** Cost Object Approver: Select the most appropriate financial approver from the dropdown (populated based on the account selected in the Cost Object field.)

4. Click on “Create Report” after filling out the report header to create the Expense Report.

3

★

4

5. If you need to re-access the report header after creating your report, click the “Report Details” button and select “Report Header” from the drop-down menu.

5



You have completed the process to create a Travel Expense Report.