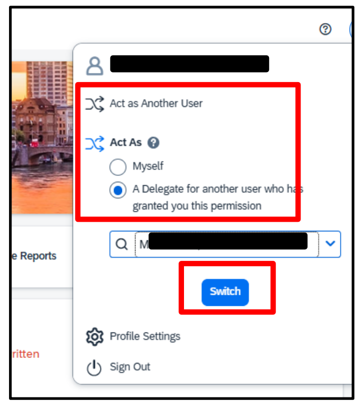
HOW TO CREATE A TRAVEL EXPENSE REPORT

An Expense Report does not have to be submitted the same day it is created. Once the trip is complete, please create and submit a single Travel Expense Report that includes the actual costs of BU business travel to be reconciled and paid. Per University policy, the Travel Expense Report must be submitted within 30 days of the trip end date.

*Note regarding Pre-Trip Approval (optional): If you submitted a Pre-Trip Approval Request and have received approval for the Request, you can create a Travel Expense Report using the approved request. Please see the *Note in step 3 for more information.

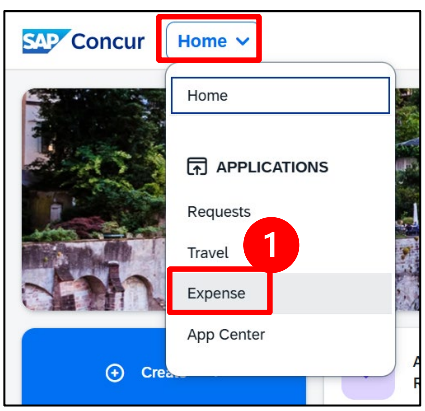
EXPENSE DELEGATES: HOW TO ACT AS ANOTHER EMPLOYEE

- To create a Travel Expense Report for another employee, you must first be assigned as the employee's Expense Delegate in Concur. [Reference: How to Assign Expense Delegates].
- Once assigned, click the profile icon in the top right corner of your Concur home page and choose **Act As Another User.**
- Select **A Delegate for another user who has granted you this permission** and enter the employee's name.
- Click the **Switch** button. Once you have switched into the other employee's profile, continue to step 1 below.

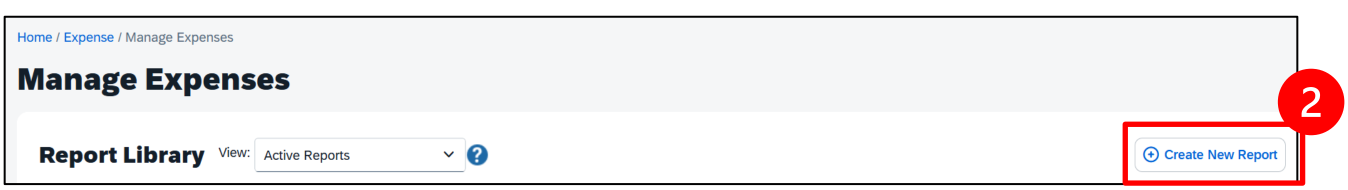


HOW TO CREATE TRAVEL EXPENSE REPORT

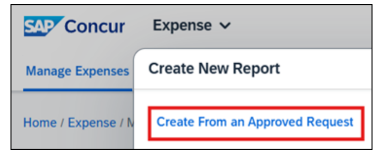
1. Click the **Home** drop-down menu and select **Expense**.



2. Click **(+) Create New Report.**

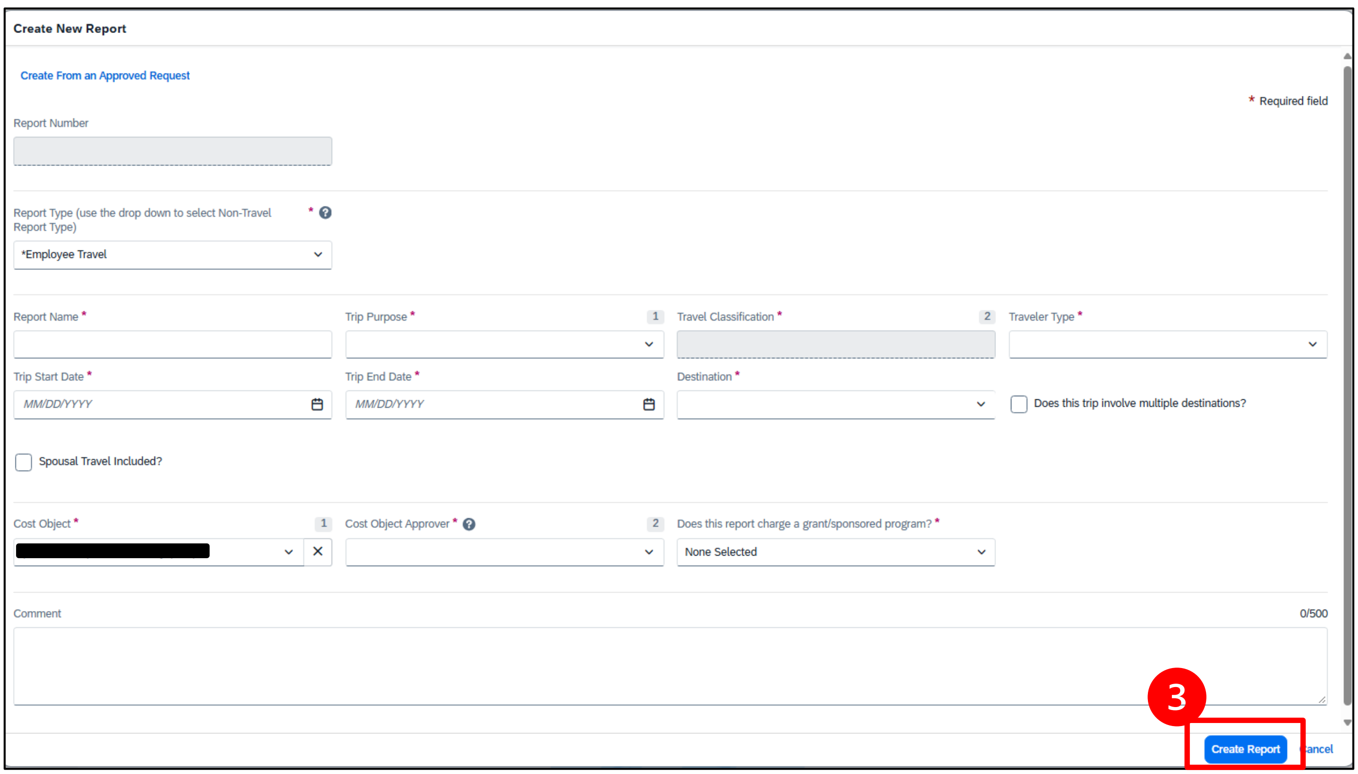


3. Complete all required fields in the report header and click **Create Report**.

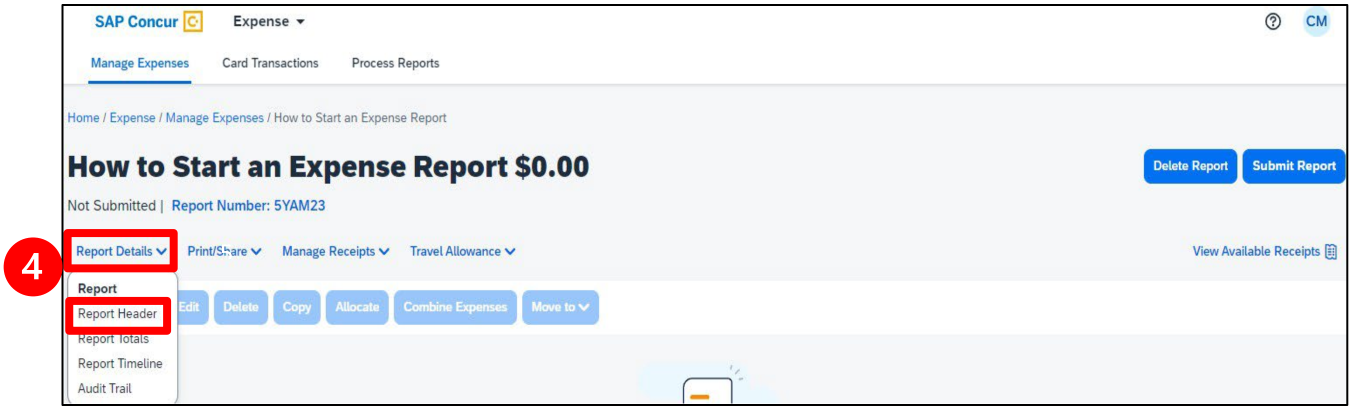


<u>*Note regarding Pre-Trip Approval (optional)</u>: If you submitted a Pre-Trip Approval Request and have received approval for the Request, select **Create from an Approved Request** and attach the approved request. The information in the Request Header will populate the Report Header.

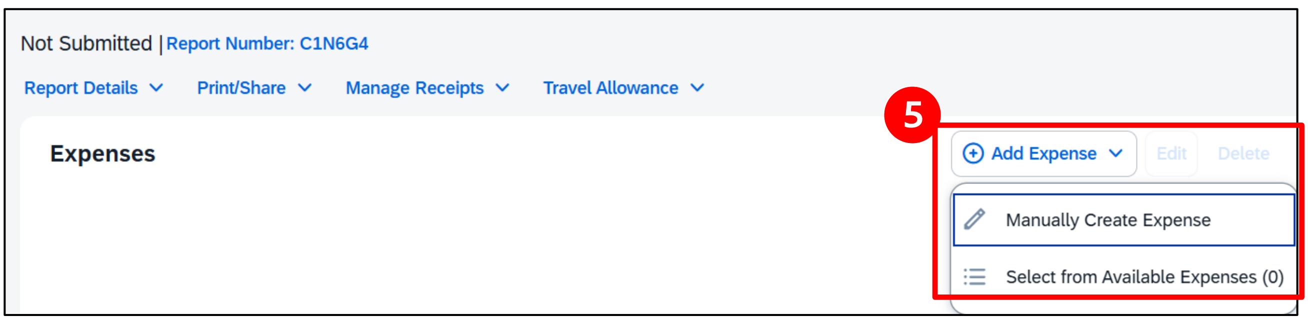
- Report Type: Employee Travel
- Report Name: Include detail to make reports easily identifiable. Do not title your reports with your name or broad terms such as "Conference."
- Trip Purpose: Select the most applicable option or choose "Other."
- Cost Object: Can be edited as needed. Any restricted account starting with a 9 should be preceded with two leading zeros (e.g., 009123456789).
- Trip Start and End Dates: Per University policy, the Travel Expense Report must be submitted within 30 days of the trip end date.
- **[NEW Requirement]** Cost Object Approver: Select the most appropriate financial approver from the drop-down (populated based on the account selected in the Cost Object field).



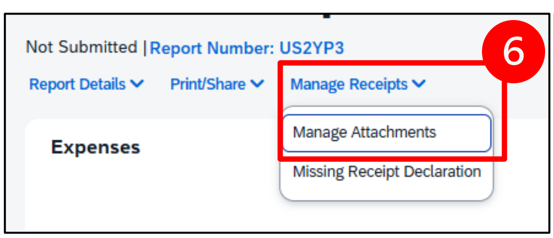
4. To re-access and/or edit the report header after creating the report, click on **Report Details** and select **Report Header** from the drop-down menu.

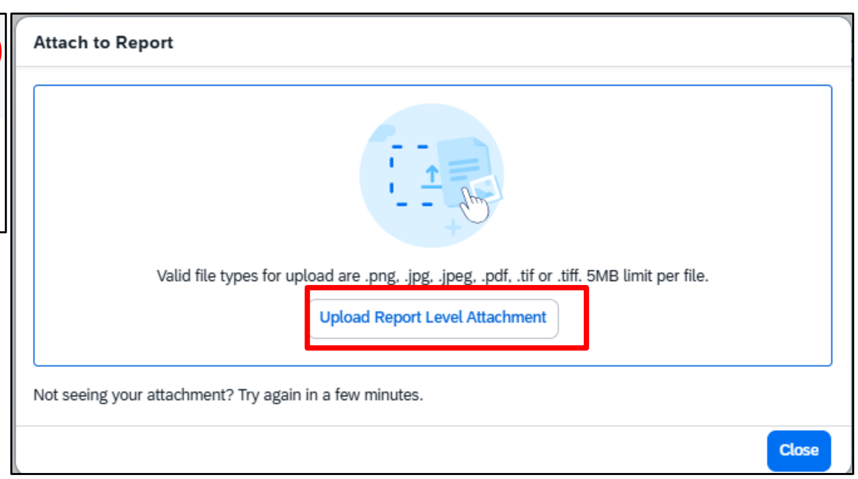


5. To add expenses to your report, click **(+) Add Expense** and choose Manually Create an Expense or Select from Available Expenses.

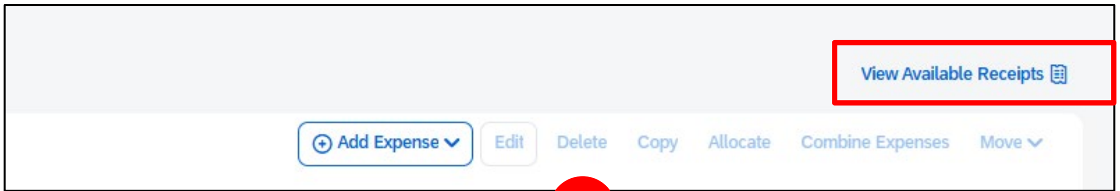


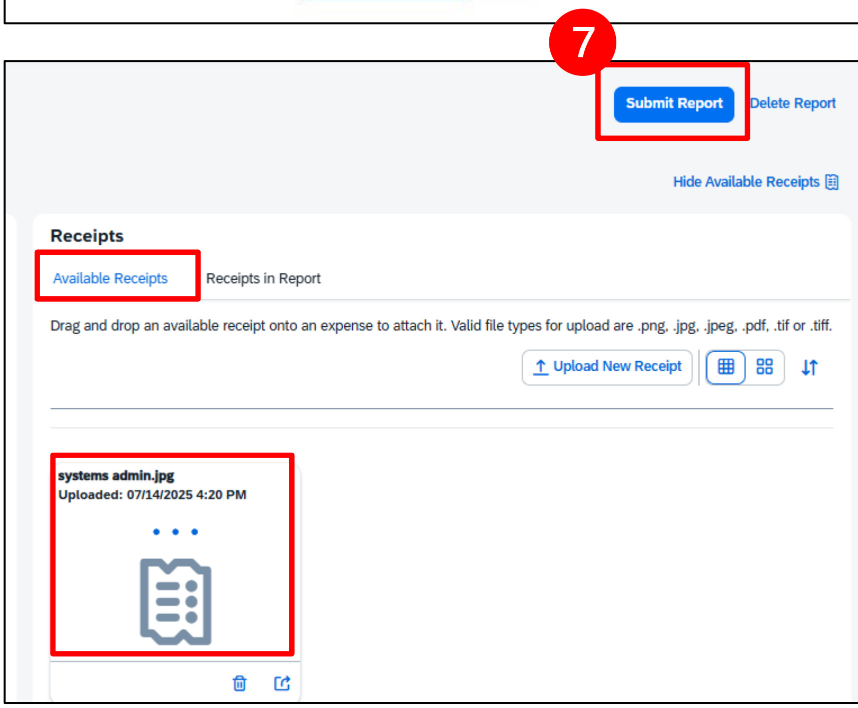
6. To upload a receipt, click on **Manage Receipts** and select **Manage Attachments**. Drag and drop your file or click the button to upload.





If you have already uploaded your receipt file using the process outlined in the "How to Upload & Manage Receipts" training guide, click on **View Available Receipts** and select the appropriate receipt image.





7. Click **Submit Report** when there are no additional expenses to be added to the Travel Expense Report (once you have returned from the trip).