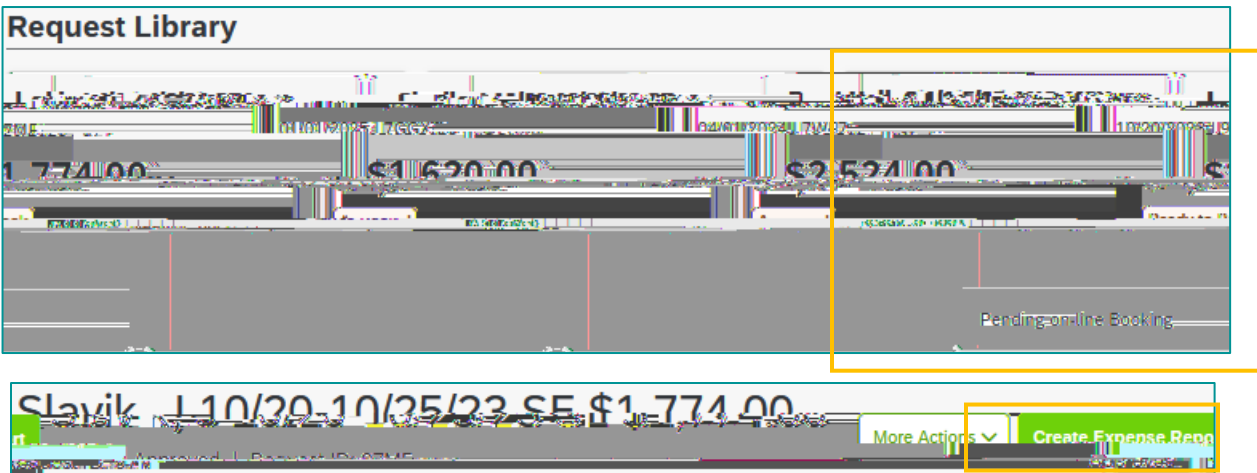


# Submit an Expense Report for Travel Expenses

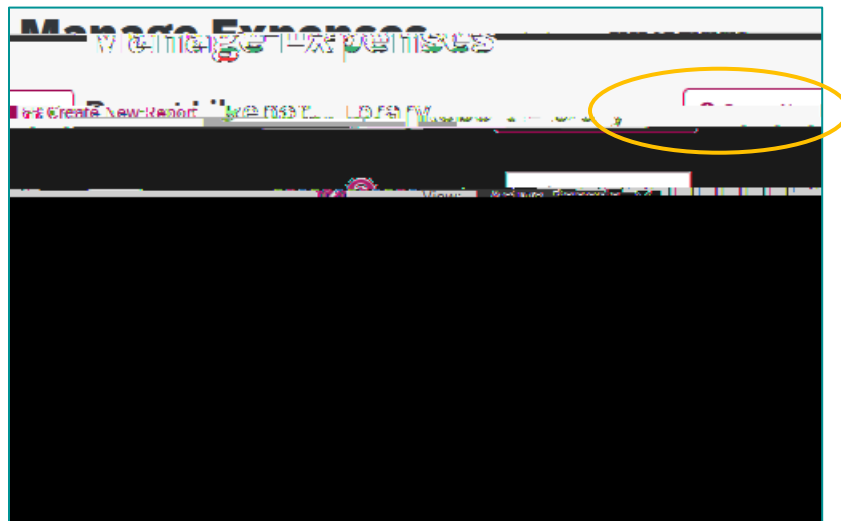
It is recommended to start the Report as soon as the Request is fully approved. This helps the traveler manage their expenses on the go and deters outstanding card charge notifications.

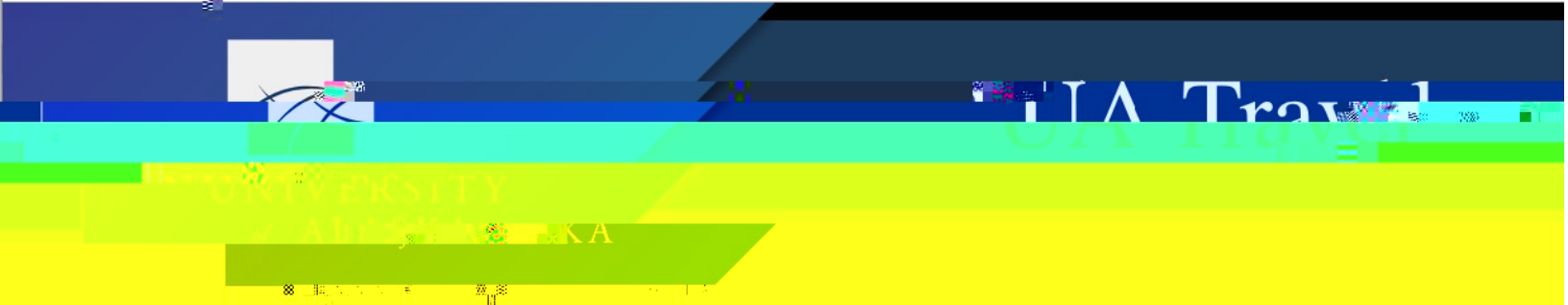
1. In the Request module, open the associated Request from the Request Library and select “Create Expense Report”; use the View drop-down menu to change the filter if Request is not listed under Active Requests



Alternatively

1. Click “Create New Report” under Manage Expenses





a. Select "Create From an Approved Request"

The screenshot shows a 'Create New Report' window. At the top, there is a dropdown menu with 'Create From an Approved Request' selected and highlighted with a yellow box. Below this, there are two required fields: 'Trip Name' and 'Trip Purpose'. The 'Trip Purpose' field currently shows 'None Selected'.

b. Choose the associated Request from the list and Create Report

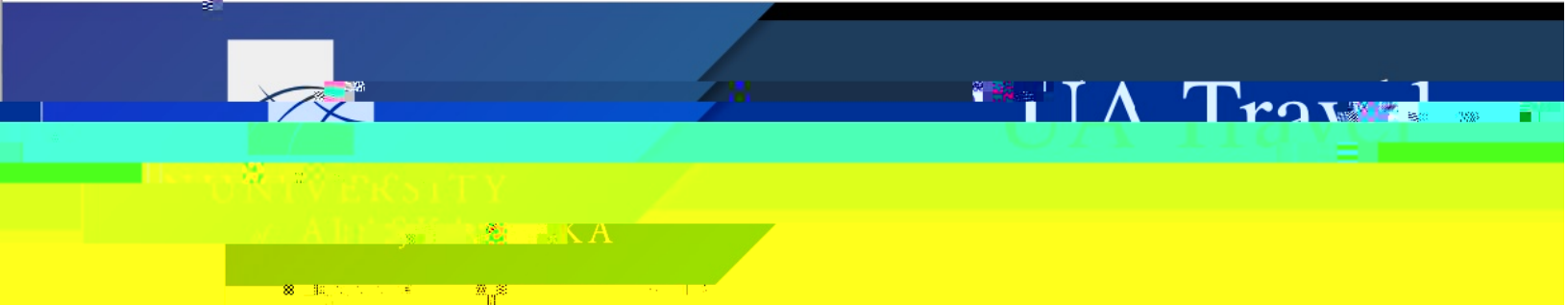
The screenshot shows a table titled 'Available Requests' with the following data:

Request Name	Request ID	Start Date	End Date	Cancelled	Request Total	Approved	Remaining
Lasinski, J 4/1 -	7WF7	04/01/2024	04/06/2024	No	\$2,524.00	\$2,524.00	\$2,524.00
Slavik, J 10/20-10	97MF	10/20/2023	10/25/2023	No	\$1,774.00	\$1,774.00	\$1,774.00

Below the table, there are 'Cancel' and 'Create Report' buttons. The 'Create Report' button is circled in yellow.

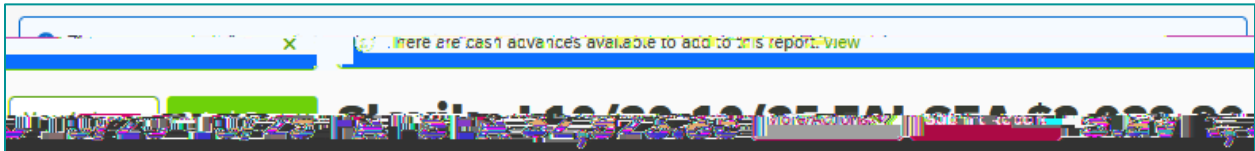
- c. The Header information auto-populates from that Request
- 2. Open the Header to verify information from the Request is still accurate and make any corrections based on changes since original trip approval

The screenshot shows a 'Report Header' window. At the top, it displays 'Slavik, J 10/20-10/25 SEA | \$1,076.46'. Below this, there are several fields for trip details, including 'Trip ID', 'Trip Description', 'Trip Type', and 'Trip Name'. The 'Trip Name' field is highlighted with a yellow box.

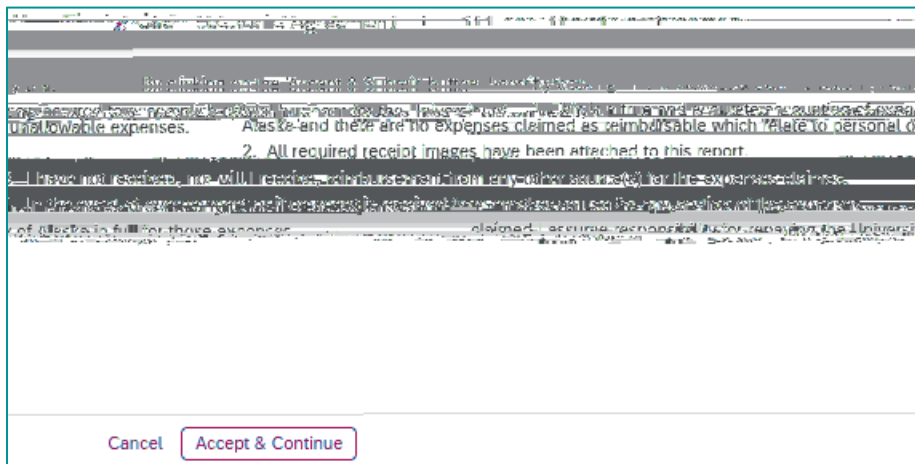
- 
3. At the bottom of the Report Header, change the Travel Allowance answer to “Yes, I want to claim Travel Allowance” if this is the first Report for a completed trip even if traveler is not claiming per diem reimbursement (the Travel Allowance documents time in travel status)

4. Enter the Travel Allowance based on the business-only itinerary and create individual p

6. Attach Receipts and other pertinent or required documentation
7. Reconcile any Travel Advances (Concur will alert the user if any are available to add to a Report)



8. Verify all information is complete and correct then Submit Report (top right-hand corner)



9. Concur evaluates the Report according to audit rules defined by UA regulations and guidance
  - a. If no Exceptions are present, the Report Totals are provided for final review and then the Report is submitted for approval

