Create an Expense Report

1. Log in to Concur. You may need to log in through MyWestern with your universal ID first.
   - Travelers skip to #2
   - Delegates Only: Click Profile on the upper-right of your dashboard and begin typing the traveler’s name to search and select from the list field under Acting as other user:

   ![Image of Concur dashboard with Acting as other user option]

   - **If you do not have** the Acting as other User option or the traveler’s name does not come up in the search, **the traveler must assign you as a delegate in their Profile Settings**. Travel Services can also enable delegate permissions.
   - Click Start Session. You are now acting as a delegate for this user, shown by the green label “Acting as . . .”:

   ![Image of Concur dashboard with user acting as a delegate]
2. **Click the Requests tab** at the top of the screen. Always begin with the approved Request.

3. **Click the Request to open.** If you do not see the related trip Request, you may need to change your View from Active Requests to All Requests or Approved Requests:

4. **Click the Create Expense Report Button** at the top right in your approved Request:

5. **Report Header information** is copied from the Request. Edit Trip Name, Trip Dates and Funding if needed by clicking on the Trip Name or Report Details:
6. **Add travel expenses by clicking the blue Add Expense button.** Include all reimbursable and non-reimbursable (including paid directly by PCard/OneCard) expenses associated with the trip.
   a. Search in the Expense Type window or select the expense type listed below:
   
   ![Expense Type Window]

   b. Complete the required fields and add comments to clarify as needed.
   c. **Be sure to select the correct Payment Type for each expense:** Reimbursable or OneCard/PCard:
d. Click Attach Receipt Image to add required documentation

e. Click Save Expense

7. To Add Meals Per Diem for an overnight trip, Click the Travel Allowance Drop Down and Click Manage Travel Allowance.
   a. “(2) Available Itineraries” are imported electronically from the Travel Booking Tool or TripLink and may be Assigned in this screen. Otherwise select “(1) Create New Itinerary”: 
Create New Itinerary. Most trips require two Itinerary Stop Rows as shown below. Complete first for the departure travel day and add another for the return travel day. Click Save after each Itinerary Stop Row:

b. Click Next, then Next again through “(2) Available Itineraries” to access “(3) Expenses & Adjustments”.

c. Check meal boxes to deduct meals that were provided (such as lunches at a conference) OR if you were not traveling during the meal time: on travel days you may claim breakfast if you’re traveling during 8am, lunch 12pm, and dinner 6pm. You’ll see the Allowance amount for each day update on the far right:
d. Click the blue Create Expenses button at the bottom right.

8. To Change or Split Funding: from the Add Expense Screen, check the box of the Expense(s) and click the Allocate Button above, or use the Allocate link found in the expense. Use the Add button to enter one or more funding sources. If needed, split by Percent or Amount:

9. Click Report Details to review and edit if necessary:
   a. Report Header
   b. Report Totals- shows breakdown of reimbursable vs non-reimbursable amounts
   c. Report Timeline to view Approval Flow
   d. Allocation Summary
10. **Click Orange Submit Report** button on the top right. Delegates will see a **Notify Employee** button instead.