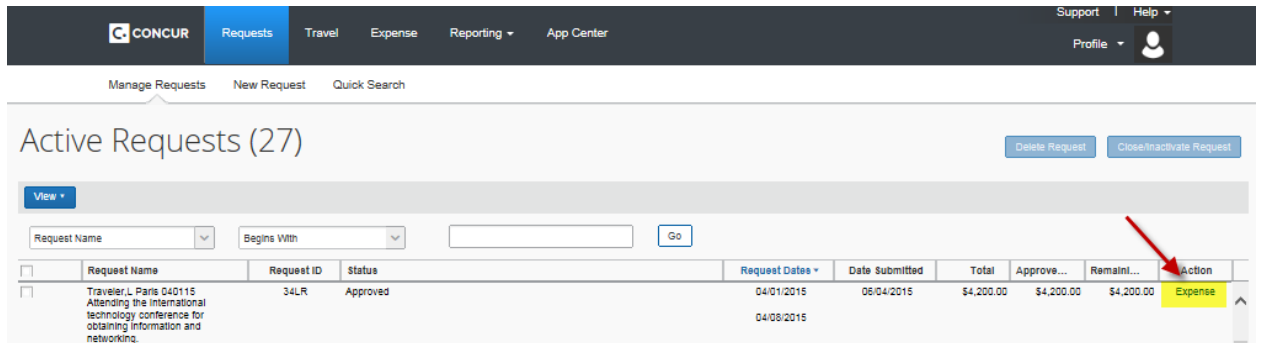# University of Houston Concur Instructions
Creating an Expense Report from a Travel Request (Local Funds)

Step 1: In your Concur main page, you can click on "Authorization Requests" in the header or in the My Tasks section. Then, look for a Travel Request for which you will be creating an Expense Report.

START HERE:
Select the appropriate Travel Request and click on the expense hyperlink.

Step 2: The system will take you to the expense report header. Select an answer for the following questions and click on "Next".

- Traveler is BOTH a non-employee and a foreign national
- All receipts submitted within 60 days after trip or moving expense
- Is this for Department Travel Card charges? (If yes, complete the 4 digits and Request ID number)

The information for the remaining fields is automatically copied from the corresponding Travel Request.

IMPORTANT

Step 3: The system will display the "Travel Allowances for Report" screen. This screen only applies to state fund travel. For local fund travel, cancel this screen by clicking on "Cancel".

"NO" Travel Allowances For Report: Traveler,L Paris 040115

1 Create New Itinerary   2 Available Itineraries   3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Traveler,L Paris 040115

Selection
USGSA_FIXED_RANL

Add Stop   Delete Rows   Import Itinerary

	Departure City ▲	Arrival City	Arrival Rate Location
	No Itinerary Rows Found		

New Itinerary Stop

Depart from (city)

Date

Time

Arrive in (city)

Date

Save

Go to Single Day Itineraries   Next >>   Cancel

Step 4: Now you are ready to record each expense.

Support | Help ▾

CONCUR   Requests   Travel   Expense   Reporting ▾   App Center

Profile ▾

Manage Expenses   View Transactions   Cash Advances ▾   Process Reports

Traveler,L Paris 040115

Delete Report   Submit Report

+ New Expense   + Quick Expenses   Import Expenses   Details ▾   Receipts ▾   Print / Email ▾

Expenses

Move ▾ Delete Copy View ▾ «

	Date ▾	Expense	Amount	Requested
	Adding New Expense			
	No Expenses Found			

New Expense   Available Receipts

Expense *

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✓ Recently Used Expense Types

Registration for Meeting (Not Grant Related)

Meal for Traveler Only

Airfare-Moving (Not taxed - 1st trip only)

Unallowed Charge on UH Credit Card

Meeting Materials

All Expense Types

01. Transportation
Airfare (Direct-Billed)
Airfare (Reimburse)
Airline Fees
Bus (Direct-Billed)
Bus (Reimburse)

TOTAL AMOUNT	TOTAL REQUESTED
$0.00	$0.00

The right panel lists expense types. Click on the applicable expense type and enter the required information for each expense.

All Expense Types   **CHOOSE THE ONES FOR REIMBURSEMENT**

01. Transportation
Airfare (Direct-Billed)
Airfare (Reimburse)
Airline Fees
Bus (Direct-Billed)
Bus (Reimburse)
Other Public Transport (Direct-Billed)
Other Public Transport (Reimburse)
Parking
Personal Car Mileage
Rental Car (Direct-Billed)
Rental Car (Reimbursed)
Rental Car Gasoline
Taxi (Direct-Billed)
Taxi (Reimburse)
Tolls
Train (Direct-Billed)
Train (Reimburse)

02. Lodging

Apartment/House Rental

Hotel Room Only

03. Meals

Meal for Traveler Only

04. Business Meals

Business Meal NOT with Prospect Employee

Business Meal with Prospective Employee

05. Other

Business Calls

Currency Exchange Fees

Game Expenses (Athletics)

Internet

Laundry

Meeting Materials

Meeting Space Rental

Other Incidental Expenses

Passports/Visa Fees

Postage/Shipping

Registration for Meeting (Grant Related)

Tax Liability for Non-Resident Alien

Travel Agency Fee

Unallowed Charge on UH Credit Card

Zero-Dollar Expense Report

do not use - - - 06. Moving Expense   Use only for Prospective Employee

Airfare-Moving (Not taxed - 1st trip only)

Airfare-Moving (Taxed - More than one trip)

Gasoline - Any Vehicle (Not taxed)

Househunting All Expenses (Taxed)

Lodging (Temp hotel, apt, etc.) - (Taxed)

Lodging Enroute including 1st Day Leave and Arrive (Not taxed)

Meal for Employee and Family (Taxed)

Mileage Over IRS Limit-Moving (Taxed)

Mileage Up to IRS Limit-Moving (Not taxed)

Moving Company - Reimburse Employee (Not taxed)

Packing Supplies-Boxing, Tape, etc. (Not taxed)

Parking-Moving (Not taxed)

Rental Truck/Van/Car-Moving (Not taxed)

Shipping Expenses - UPS, Fedex, USPS, etc. (Not taxed)

Storage, Temp (including PODS) Less Than 30 Days (Not taxed)

Storage, Temp (including PODS) More Than 30 Days (Taxed)

Taxi-Moving (Not taxed)

Tolls-Moving (Not taxed)

Train-Moving (Not taxed)

Vehicle Transport (Not taxed)

Visa Application Fee (Not taxed)

Example: *Airfare (Reimburse)*

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Click on Airfre (Reimburse).

Complete the required information and click on "Save".

Example: *Hotel Room Only (itemization required)*

Click on Hotel Room Only.

Complete the required fields and click on "Itemize".

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If you don't understand how to itemize still click "itemized" and then save. Leave it for the Travel Coordinator

Enter Check-in and Check-out dates, Room Rate, and Hotel Tax. Click on "Save Itemizations".

Note: If room rate and tax is not separated (foreign travel), place a checkmark for "Combine room rate and taxes into a single entry).

The system lists hotel room rate and tax separately.

Example – Traveler Meals (itemization required for alcohol)

Click on Meal for Traveler Only".

Complete the required field. Click on "save" if no alcohol was charged. Click on"
Itemize" if alcohol was charged. **NOTE: Alcohol is not allowed for reimbursement
unless Professor has cost center to cover.**

To itemizing alcohol, select "Alcohol with Traveler Meal" for Expense Type. Enter the required information and amount, then save.

To itemize the meal portion, select "Meal for Traveler Only" for Expense Type. Enter the required information and amount, then save.

The system lists meal and alcohol separately.

Step 6: Attach a receipt, if required. Concur will tell you if a receipt is required for each expense type.

Go to "Receipts" and select "Attach Receipt Images".

Select an applicable expense. Then click on "Browse".

Select a file and click on "Upload".

Note: If you want to upload documents at the Expense Report Header level (not for individual expenses), then do not select expense. Just click on "Browse".

Examples of documents you would upload to the Expense Report Header include:
- Post-trip travel report
- Fly America Act Waiver Checklist if it was necessary to use a non-US carrier for international travel on federal funds
- Moving expense worksheet
- Taxable Payments or Reimbusements to Employees form, if applicable

IMPORTANT: Do NOT submit. Instead email Travel Coordinator for review. You will be notified when to submit
Step 7: Click on "Submit Report" to submit the Expense Report into workflow.