

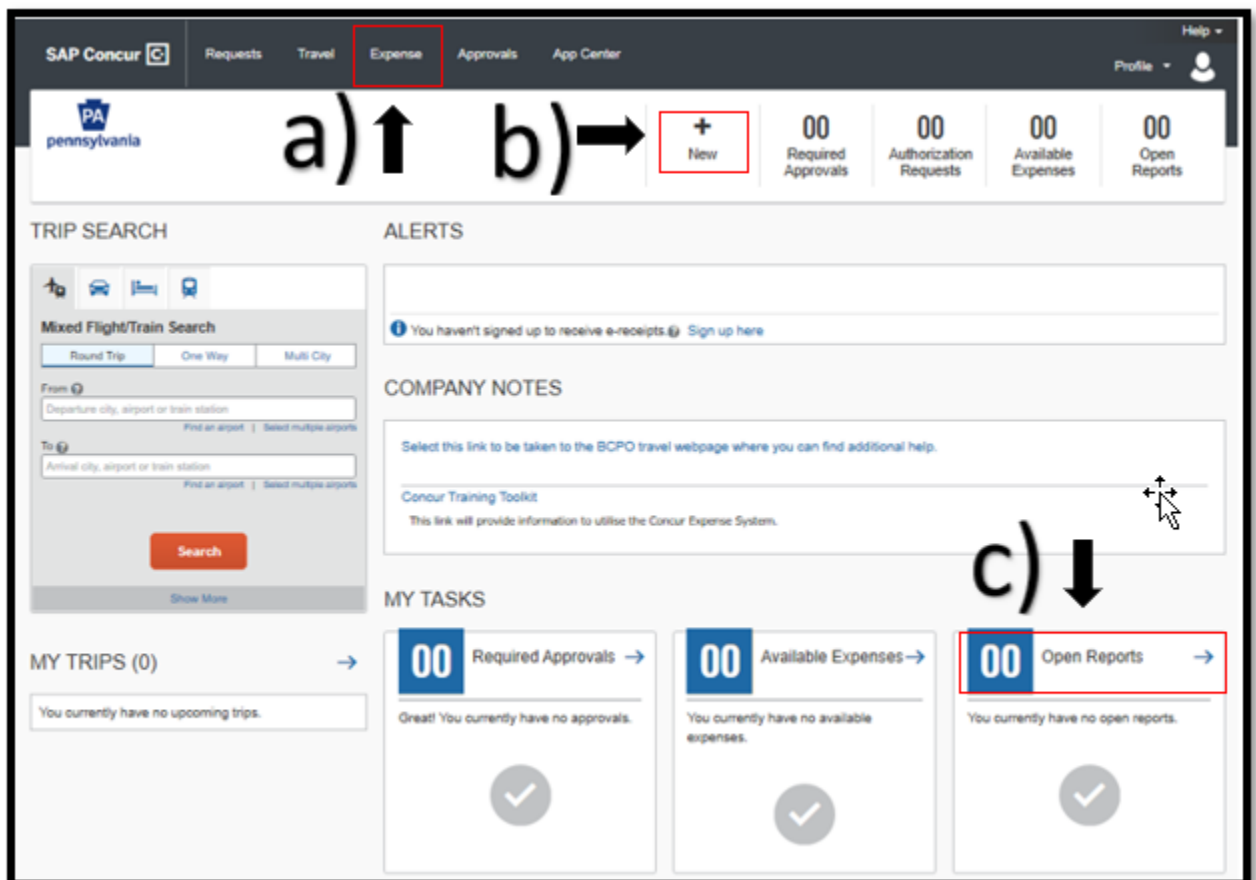
User Guide – Create a New Expense Report for a Day Trip

This guide is intended to walk an employee through the basics of how to create a new expense report in SAP Concur. The example in this guide is for a day trip with personal vehicle mileage and a parking expense.

1. Sign into SAP Concur to access your home page. [Reference: SAP Concur User Guide – Signing In]

On the home page, there are a few options available to create a new expense report. You can choose from the following:

- a) Click **Expense** in the top menu bar. When the **Manage Expenses** sub-menu appears, click the **+ Create New Report** tile;
- b) In the **Quick Task** bar, hover your mouse pointer over **+ New** and click Start a Report;
- c) In the **My Tasks** section, click Open Reports and then click the **+ Create New Report** tile.



Complete the Report Header

1. After selecting one of the options to create a new report, the **Create New Report** header information window will be displayed. Complete the * required fields and any optional fields as needed. Some fields will be pre-populated with information from your profile and you will not be able to change them.

Create New Report * Indicates required field

Policy: *COPA-US Expense Policy

Reason for Trip *

Trip Start Date * MM/DD/YYYY

Trip End Date * MM/DD/YYYY

Report Key

Report Date

Business Area 1

Fund * 2

Budget Period * 3

Cost Center: 8128601000

Internal Order

WBS

Employee ID

Employee Group

Business Area Description

HR Org Unit

HR Org Unit Description

Employee Subgroup

Personnel Subarea

Employee Expense Grouping

Work Address Street

Work Address City

Work Address Zip

Exception #

Activity Type *

Comment

Claim Travel Allowance
Will you be claiming Overnight Subsistence?

Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

2. After completing the header information, select the radio button at the bottom of the page for “No, I do not want to claim Travel Allowance”. This option is selected for day trips. Travel Allowance is only necessary if your report includes overnight travel expenses.

Claim Travel Allowance
Will you be claiming Overnight Subsistence?

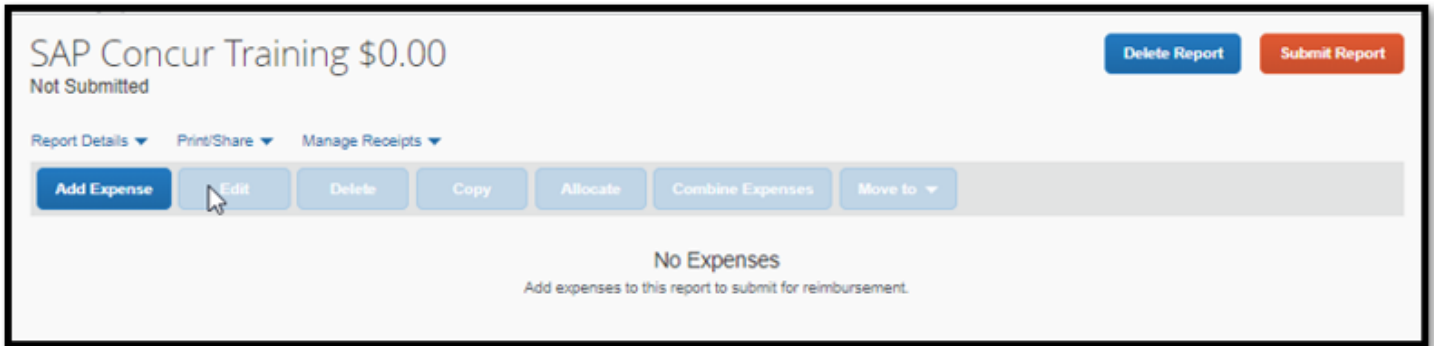
Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

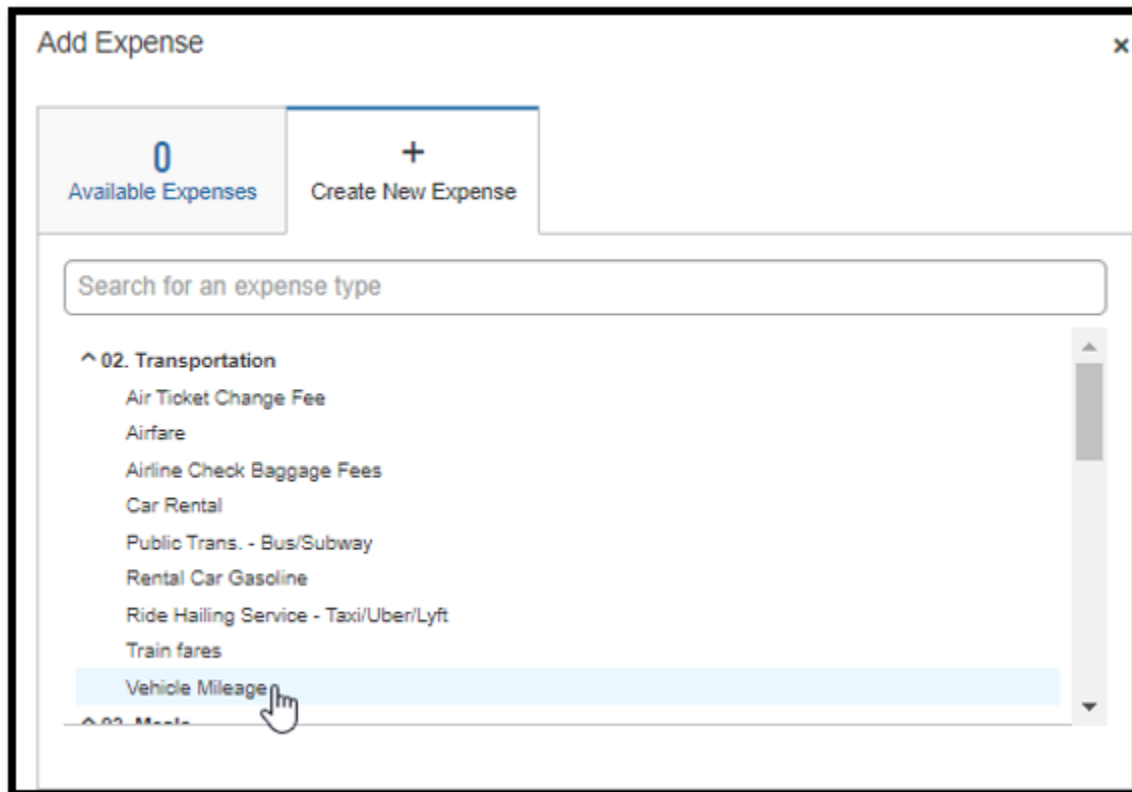
3. After the radio button is selected, click on the **Create Report** button to begin adding expenses.

Add Personal Vehicle Mileage

1. After completing the report header, the main Expense page is displayed with your Reason for Trip as the page title. Click the **Add Expense** button to add a new expense.



2. The **Add Expense** window will be displayed with the + **Create New Expense** tab selected. Select an expense from the list of available expense types or type the expense type name in the search field. In this example, we will be entering personal vehicle mileage. Select the **Vehicle Mileage** expense type from the dropdown list.



- On the **New Expense** page with the **Details** tab selected. Complete the * required fields and any optional fields as needed.

You can enter the number of business miles manually in the **Distance** field or SAP Concur can calculate the miles for you. In this example, we will use the Mileage Calculator to have SAP Concur calculate the miles.

- On the **New Expense** page, click the **Mileage Calculator** link. The Mileage Calculator window will open to enter waypoint addresses. Enter the waypoints to match your actual route segments driven for the day.

Note: Any mileage segments that are not reimbursable as business miles, such as personal commuting, should be excluded by clicking the Personal checkbox that corresponds to that segment.

Tip: After entering your departing route waypoints, you can click on the **Make Round Trip** link to quickly add the return waypoints. Only do this if your trip route had the same route for the depart and return waypoints.

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

- A 20 Azalea Dr, Harrisburg, PA 17110, US 2.2 MI Personal
- B 555 Walnut St, Harrisburg, PA 17101, U 2.1 MI Personal
- C 20 Azalea Dr, Harrisburg, PA 17110, US
- D

[Calculate Route](#) [Make Round Trip](#)

Directions

A 128 Azalea Dr, Harrisburg, PA 17110, USA

2.2 mi. About 7 mins

1. Head southwest on Azalea Dr toward S Cir Dr 0.3 mi
2. Turn left onto N Cameron St 0.2 mi
3. Continue straight onto PA-230 E/N Cameron St 1.4 mi
Continue to follow PA-230 E
4. Turn right onto Market St 0.2 mi

TOTAL PERSONAL **0.0 MI** TOTAL BUSINESS **4.3 MI**

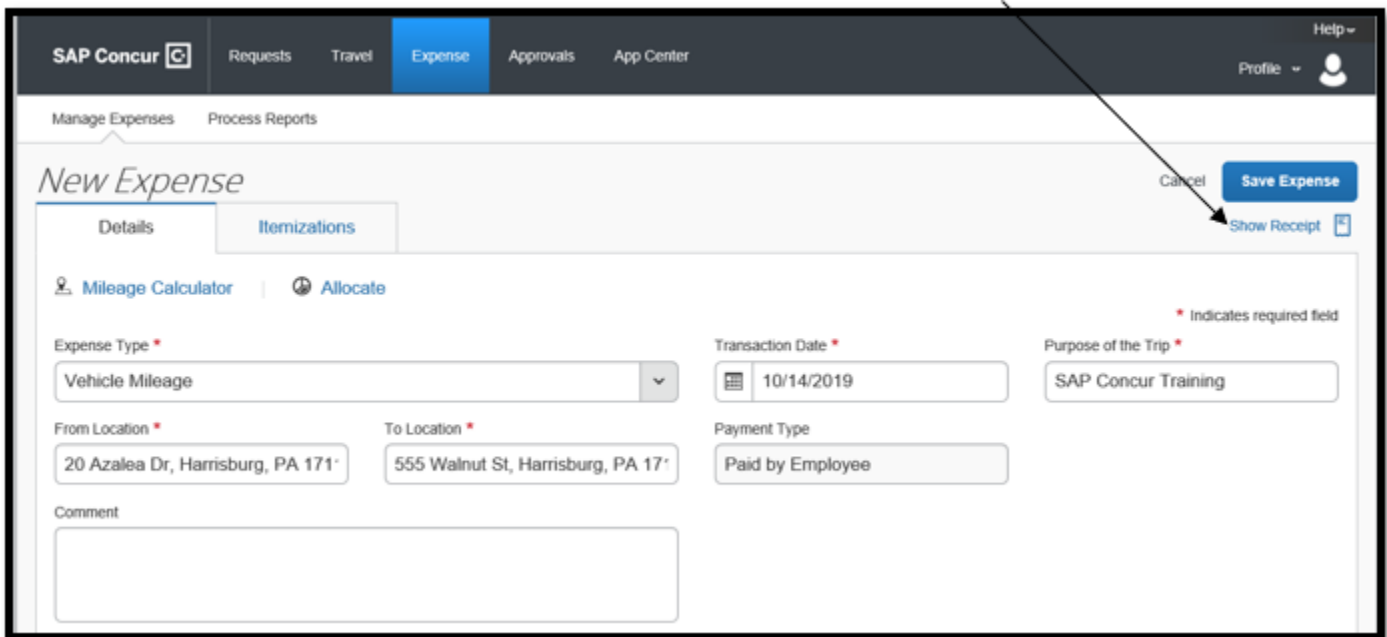
The map shows a route in Harrisburg, PA, starting at point A (128 Azalea Dr), going to point B (555 Walnut St), then to point C (20 Azalea Dr), and returning to point A. The route is highlighted in blue. Landmarks include the Department of General Services Annex Complex, The State Museum of Pennsylvania, and Harrisburg University of Science and Technology. The Susquehanna River and Harvey Taylor Bridge are also visible.

When complete, click the **Add Mileage to Expense** button.

Attach a Receipt Image

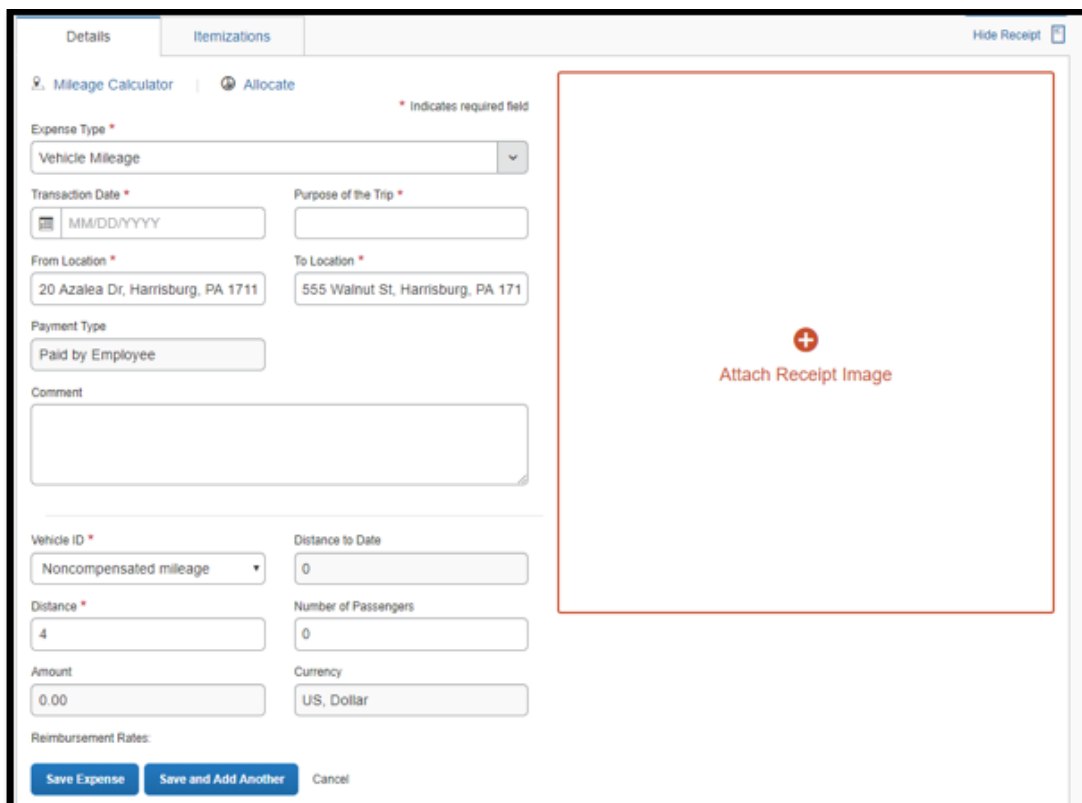
You can attach a document image to any expense type.

1. On the **New Expense** page, select the **Show Receipt** link to open a window in the current page that will give you the option to **+ Attach Receipt Image**.



The screenshot shows the SAP Concur 'New Expense' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (selected), 'Approvals', and 'App Center'. The main header has 'Manage Expenses' and 'Process Reports'. The page title is 'New Expense'. On the right, there are 'Cancel', 'Save Expense', and 'Show Receipt' buttons. The 'Show Receipt' button is highlighted with a red arrow. Below the header, there are tabs for 'Details' and 'Itemizations'. The 'Details' tab is active, showing fields for 'Expense Type' (Vehicle Mileage), 'Transaction Date' (10/14/2019), 'Purpose of the Trip' (SAP Concur Training), 'From Location' (20 Azalea Dr, Harrisburg, PA 17111), 'To Location' (555 Walnut St, Harrisburg, PA 17111), and 'Payment Type' (Paid by Employee). There is also a 'Comment' field.

2. Clicking the **+ Attach Receipt Image** window to attach a file. Note: Receipt images must be of an acceptable file type (.pdf, .png, .jpg, .jpeg, .tif, or .tiff) and must be less than 5 megabytes (MB) in size.

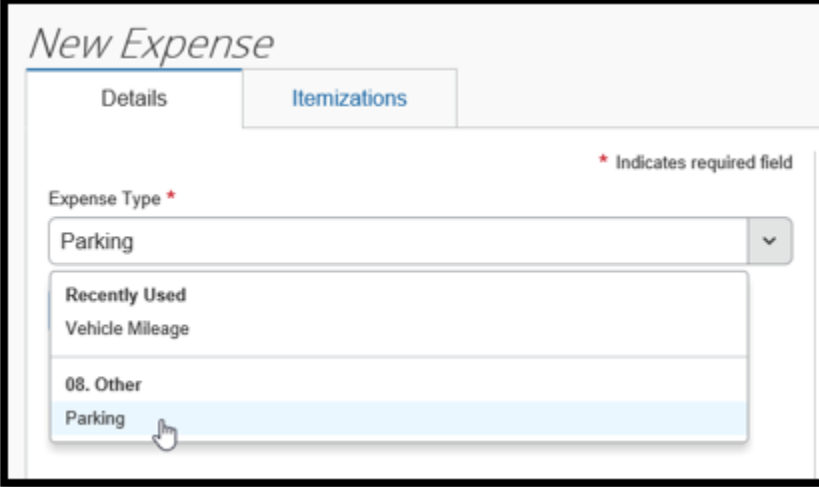


The screenshot shows the 'Attach Receipt Image' window. The window is titled 'Attach Receipt Image' and contains a large red plus sign in the center. The background shows the 'New Expense' page with the 'Show Receipt' link highlighted. The 'Attach Receipt Image' window is a modal dialog that allows users to upload a receipt image. The background page shows the 'Details' tab with fields for 'Expense Type' (Vehicle Mileage), 'Transaction Date' (MM/DD/YYYY), 'Purpose of the Trip', 'From Location' (20 Azalea Dr, Harrisburg, PA 17111), 'To Location' (555 Walnut St, Harrisburg, PA 17111), 'Payment Type' (Paid by Employee), 'Comment', 'Vehicle ID' (Noncompensated mileage), 'Distance to Date' (0), 'Distance' (4), 'Number of Passengers' (0), 'Amount' (0.00), and 'Currency' (US, Dollar). There are also 'Save Expense', 'Save and Add Another', and 'Cancel' buttons at the bottom.

If finished entering expenses, click the **Save Expense** button. If more expenses need to be entered, click the **Save and Add Another** button. In this example, we will add another expense to the report for Parking. Select the **Save and Add Another** button.

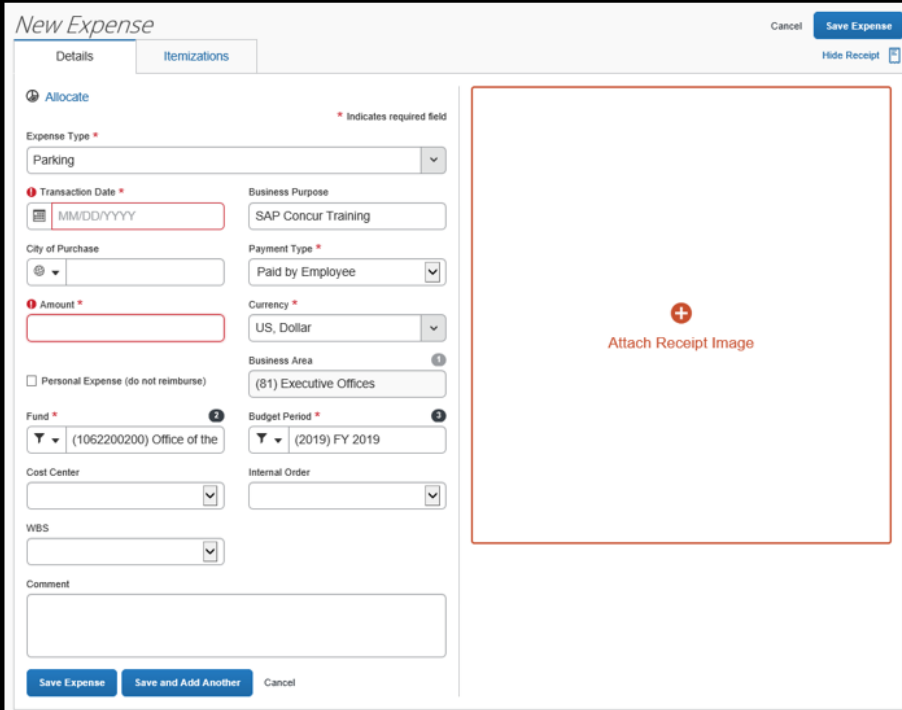
Add a Parking Expense

1. On the **New Expense** page, type Parking in the search field or select the drop down and navigate through the list and select the Parking expense type.



The screenshot shows the 'New Expense' form with the 'Itemizations' tab selected. The 'Expense Type' dropdown menu is open, showing 'Parking' as the selected option. Below the dropdown, a 'Recently Used' section lists 'Vehicle Mileage' and '08. Other Parking', with a mouse cursor hovering over 'Parking'.

3. Complete the required fields and any optional fields as needed.
4. Click in the **+ Attach Receipt Image** window to attach a receipt. Note: Receipt images must be of an acceptable file type (.pdf, .png, .jpg, .jpeg, .tif, or .tiff) and must be less than 5 megabytes (MB) in size.



The screenshot shows the 'New Expense' form with the 'Details' tab selected. The form is filled out with various fields, including 'Expense Type', 'Transaction Date', 'Business Purpose', 'City of Purchase', 'Payment Type', 'Amount', 'Currency', 'Business Area', 'Fund', 'Budget Period', 'Cost Center', 'Internal Order', 'WBS', and 'Comment'. A large red box labeled '+ Attach Receipt Image' is visible on the right side of the form.

- When complete, you again have the option to click the **Save Expense** button or the **Save and Add Another** button to continue entering expenses. In this example, we are finished entering expenses. Click the **Save Expense** button.

The screenshot displays the SAP Concur 'New Expense' interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted), 'Approvals', and 'App Center'. The user's profile is visible in the top right corner. The main header shows 'Manage Expenses' and 'Process Reports'. The page title is 'New Expense', with 'Cancel' and 'Save Expense' buttons on the right. Below the title are tabs for 'Details' and 'Itemizations'. The 'Details' tab is active, showing a form with the following fields:

- Expense Type ***: Parking
- Transaction Date ***: 10/14/2019
- Business Purpose**: SAP Concur Training
- City of Purchase**: [Empty]
- Payment Type ***: Paid by Employee
- Amount ***: 5.00
- Currency ***: US, Dollar
- Personal Expense (do not reimburse)**:
- Business Area**: (81) Executive Offices
- Fund ***: (1062200200) Office of the
- Budget Period ***: (2019) FY 2019
- Cost Center**: [Empty]
- Internal Order**: [Empty]
- WBS**: [Empty]
- Comment**: [Empty text area]

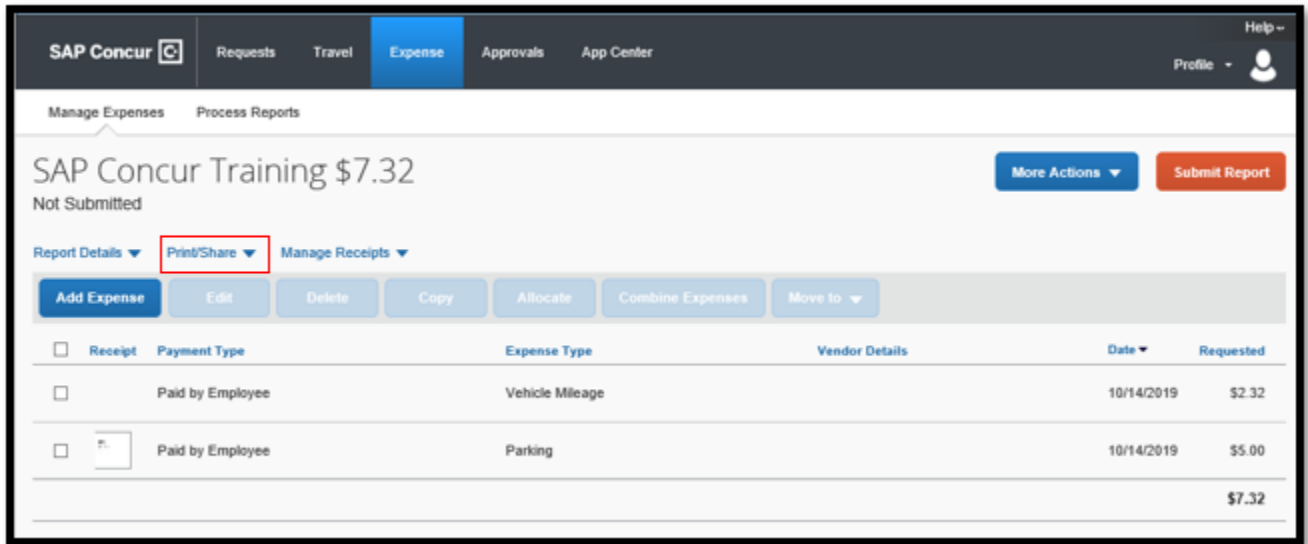
At the bottom of the form are buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'. To the right, the 'Itemizations' tab is visible, showing a receipt for 'Text Receipt - Parking' at '355 Walnut Street, Harrisburg, PA 17101'. The receipt details include:

- Entered: 10/14/19 07:27
- Exited: 10/14/19 08:14
- Parking Fee: \$5.00
- Cash: \$5.00

A 'Detach' button is located at the bottom of the itemization area.

View, Print, Save, or Email the Expense Report

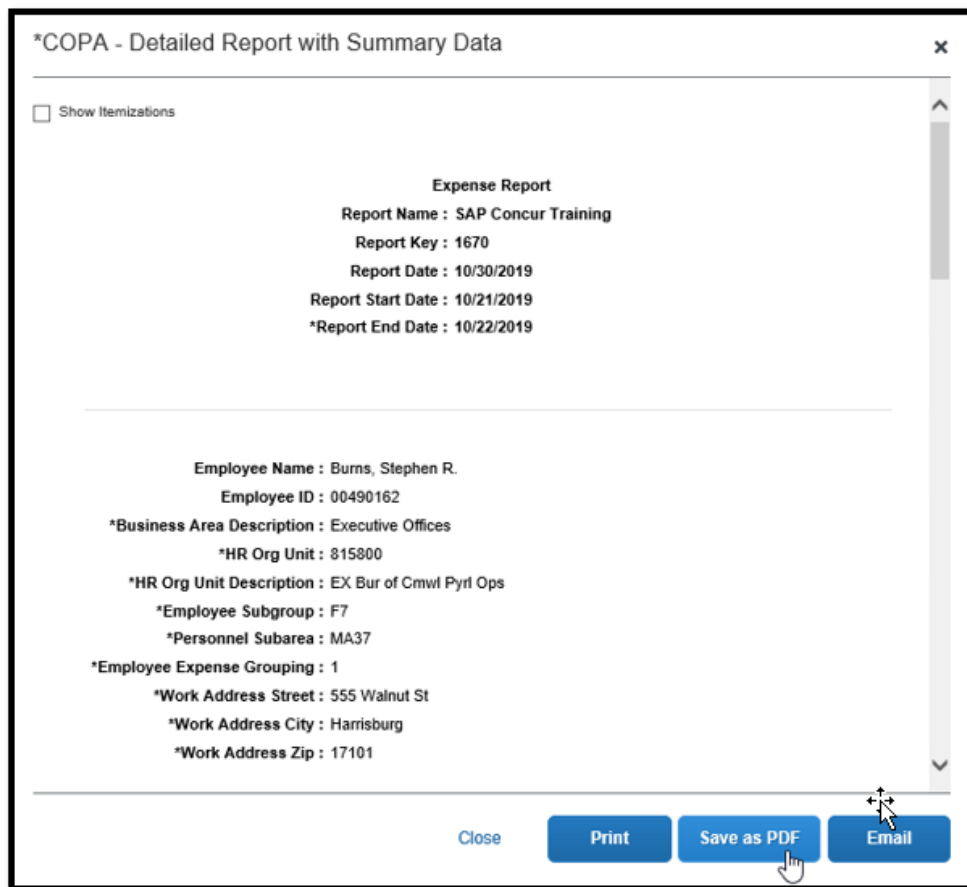
1. On the main Expense page, click the **Print/Share** dropdown arrow and select the report name.



The screenshot shows the SAP Concur Expense Report interface. The main header displays "SAP Concur Training \$7.32" and "Not Submitted". Below this, there are tabs for "Report Details" and "Print/Share" (highlighted with a red box). A row of action buttons includes "Add Expense", "Edit", "Delete", "Copy", "Allocate", "Combine Expenses", and "Move to". A table lists expense items with columns for Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The total amount is \$7.32.

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Paid by Employee	Vehicle Mileage		10/14/2019	\$2.32
<input type="checkbox"/>	Paid by Employee	Parking		10/14/2019	\$5.00
					\$7.32

2. Click on the appropriate button to Print, Save as PDF, or Email the report.



The screenshot shows the "Print/Share" dialog box titled "*COPA - Detailed Report with Summary Data". It contains a "Show Itemizations" checkbox and a scrollable area with the following information:

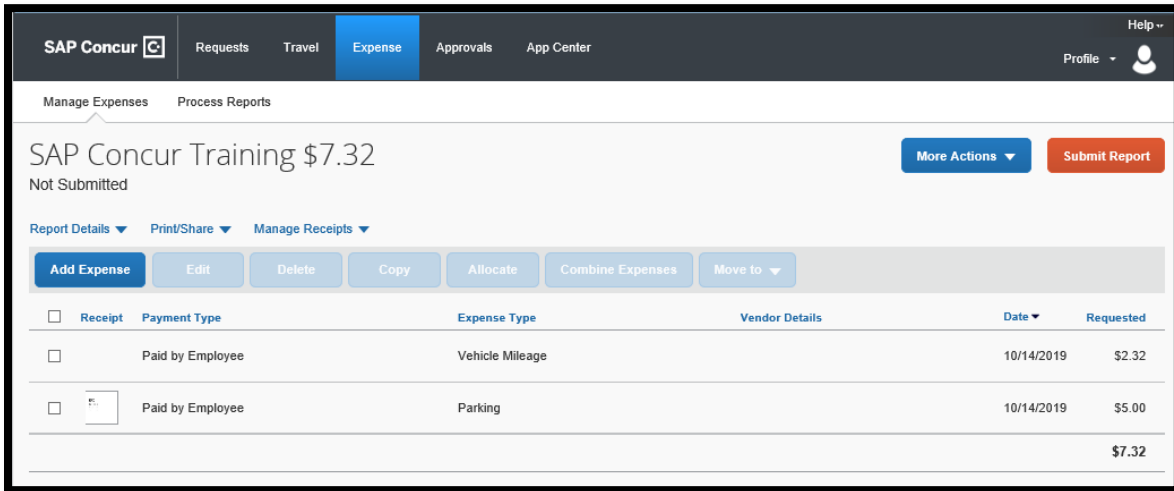
Expense Report
Report Name : SAP Concur Training
Report Key : 1670
Report Date : 10/30/2019
Report Start Date : 10/21/2019
*Report End Date : 10/22/2019

Employee Name : Burns, Stephen R.
Employee ID : 00490162
*Business Area Description : Executive Offices
*HR Org Unit : 815800
*HR Org Unit Description : EX Bur of Cmwf Pysl Ops
*Employee Subgroup : F7
*Personnel Subarea : MA37
*Employee Expense Grouping : 1
*Work Address Street : 555 Walnut St
*Work Address City : Harrisburg
*Work Address Zip : 17101

At the bottom, there are buttons for "Close", "Print", "Save as PDF", and "Email". A mouse cursor is pointing at the "Save as PDF" button.

Submit the Expense Report

1. When finished entering expenses and attaching receipt images, click the **Submit Report** button to send to the designated travel approver.



Note: SAP Concur has been configured to the commonwealth travel policy requirements. Alerts may appear that need to be resolved in order to submit the report. When the Alerts are resolved, a window will appear indicating you were successful.

The report now has a green bar indicating the report has been Submitted. The report is finished!

