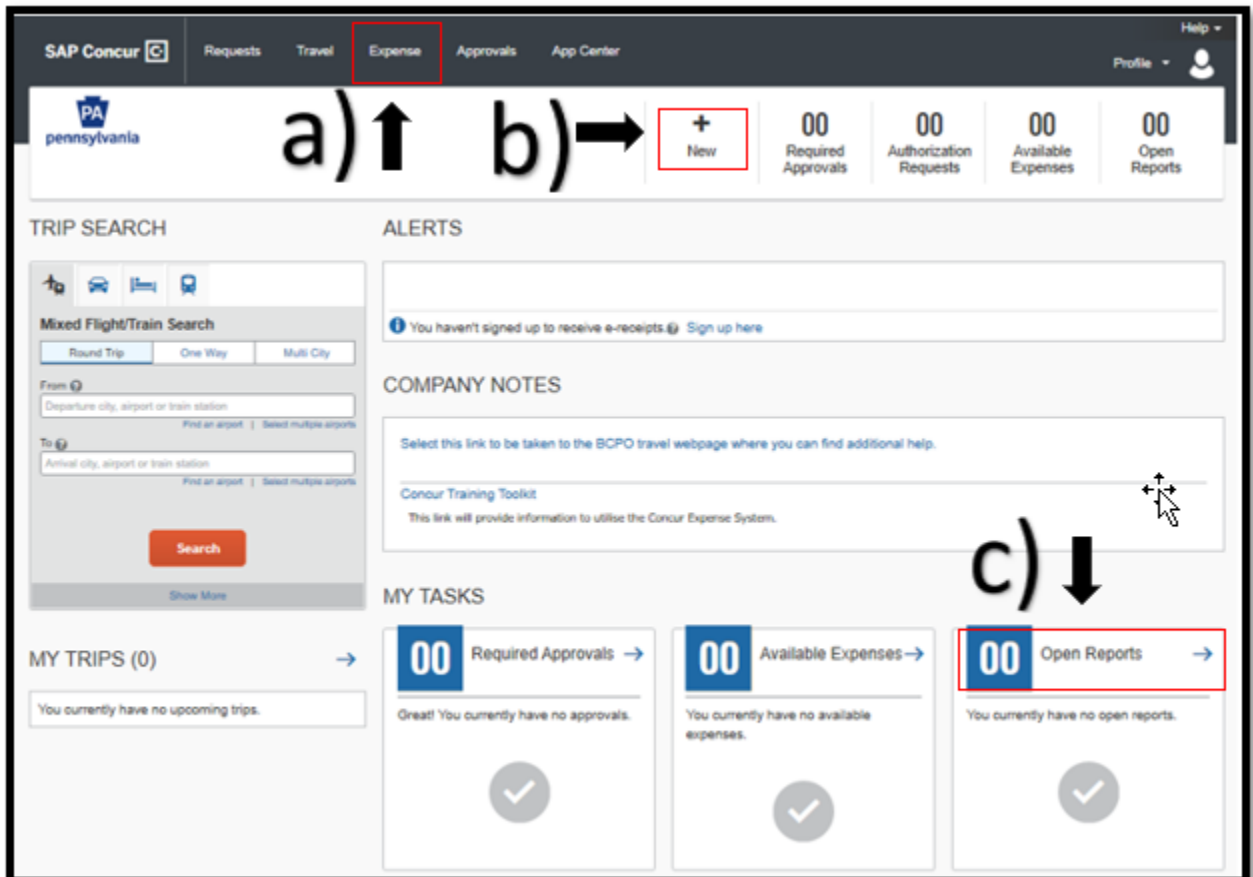# User Guide – Create a New Expense Report for an Overnight Trip

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 an overnight trip with state vehicle mileage, hotel, tolls, and overnight subsistence.

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	Reason for Trip *	Trip Start Date *
*COPA-US Expense Policy		MM/DD/YYYY

Trip End Date *	Report Key	Report Date
MM/DD/YYYY		

Business Area ❶	Fund * ❷	Budget Period * ❸

Cost Center	Internal Order	WBS
8128601000		

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 "Yes, I want to claim Travel Allowance". Travel Allowance is necessary if your report includes overnight travel expenses.

3. After the radio button is selected, click on the **Next** button to begin creating an itinerary.

Create an Itinerary

In this example, we will complete an expense report for an overnight trip from Philadelphia to Harrisburg and return.

1. On the **Travel Allowances for Report** page, complete the required **New Itinerary Stop** fields. You must enter the city of your hotel in the Arrival City field in order to properly determine the maximum travel allowances for lodging and subsistence.

2. Click the **Save** button to add the segment to the table on the Itinerary Info page.
3. Complete the required **New Itinerary Stop fields** for the return trip.

4. When the trip destinations are complete, click the **Next** button.
5. Review the itinerary that was saved. If complete, select **Next** and a window will open to allow you to report if any meals were provided to you during the trip (i.e. lunch provided at conference). Check all boxes that apply. In this example, no meals were provided.


6. click the **Create Expenses** button to start creating expenses.

Add State Vehicle Mileage

1. After completing the report header and itinerary, 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.
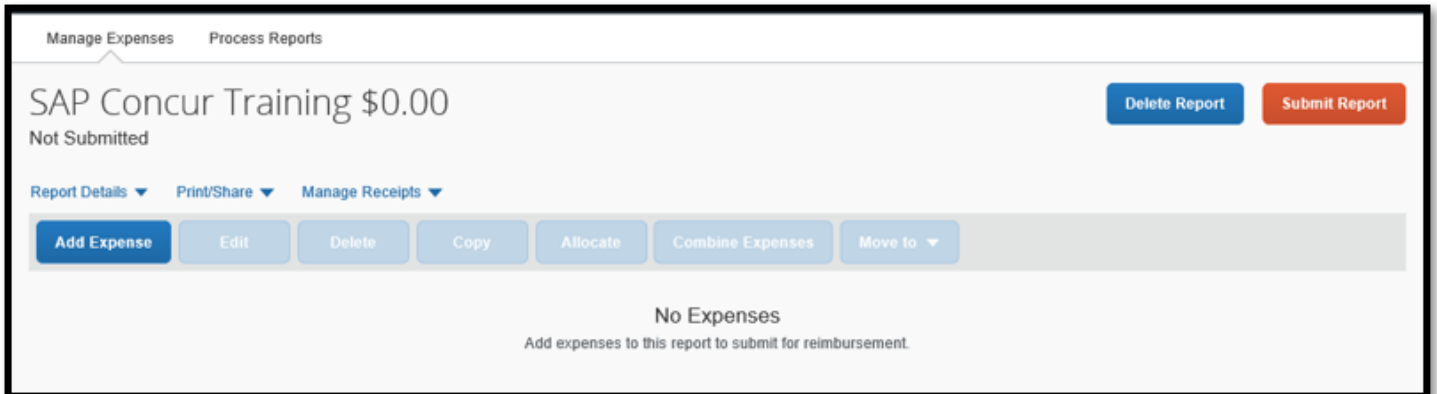
2. The **Add Expense** window will be displayed with the + **Create New Expense** tab selected. Select an expense from the list of available expense types or type the expense type name in the search field. In this example, we will be entering state vehicle mileage. Select the **Vehicle Mileage** expense type from the dropdown list.
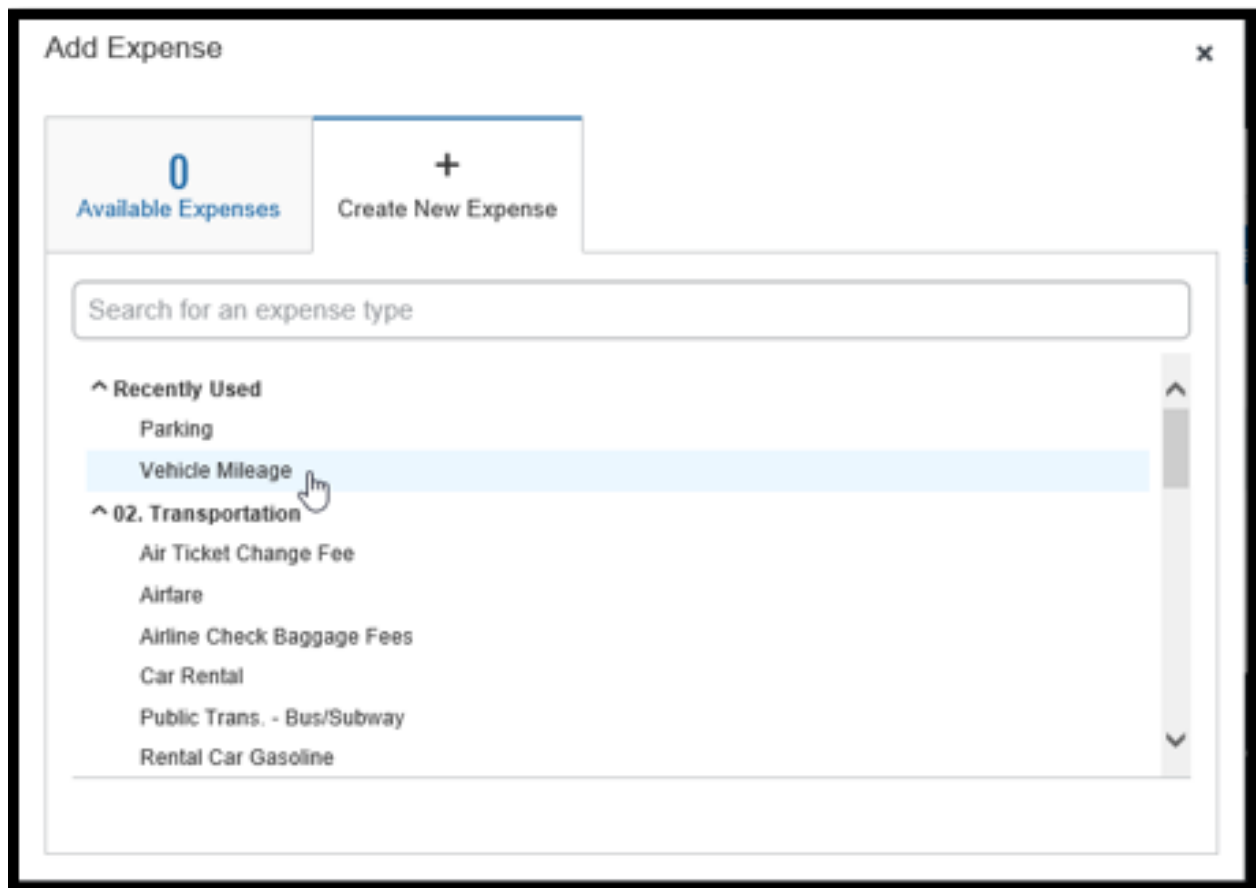
3. On the **New Expense** page with the **Details** tab selected. Complete the * required fields and any optional fields as needed. In this example, select State Vehicle from the Vehicle ID dropdown list.

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

5. When complete, select the **Save and Add Another** button.

Add a Hotel Expense

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

2. Complete the * required fields and any optional fields as needed. For the payment type field, select **Paid by Employee** from the dropdown list for the employee to be reimbursed. Select the payment type **Paid by COPA** from the dropdown list if the employee should not be reimbursed.

SAP Concur requires the hotel room charges be itemized requires a receipt be attached. If an attempt is made to save at this time, an alert window will appear and advise what actions are required to resolve.

Attach a Receipt Image to the Hotel Expense

1. On the **New Expense** page, 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.
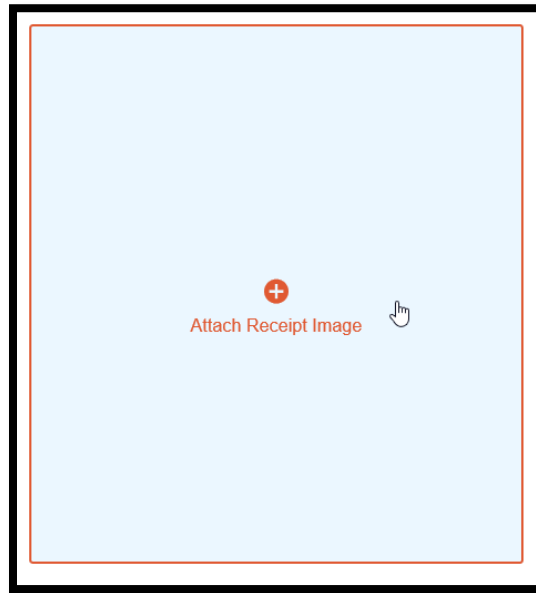
Itemize the Hotel Expense

1. After the image is attached, select the **Itemizations** tab.

2. Click the **Create Itemization** button.
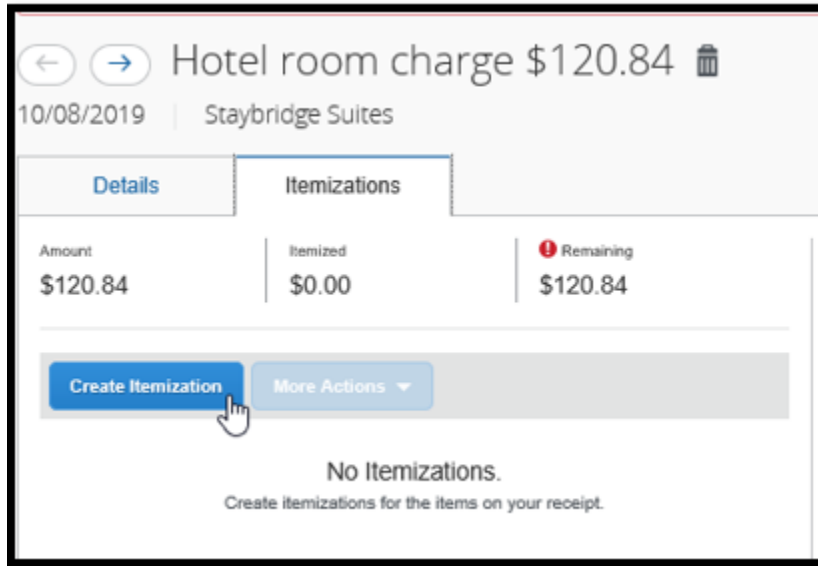
3. On the New Itemization page, type **Hotel room charge** in the search field or navigate to the **Hotel room charge** expense type in the dropdown list. Click on the **Hotel room charge** expense type.
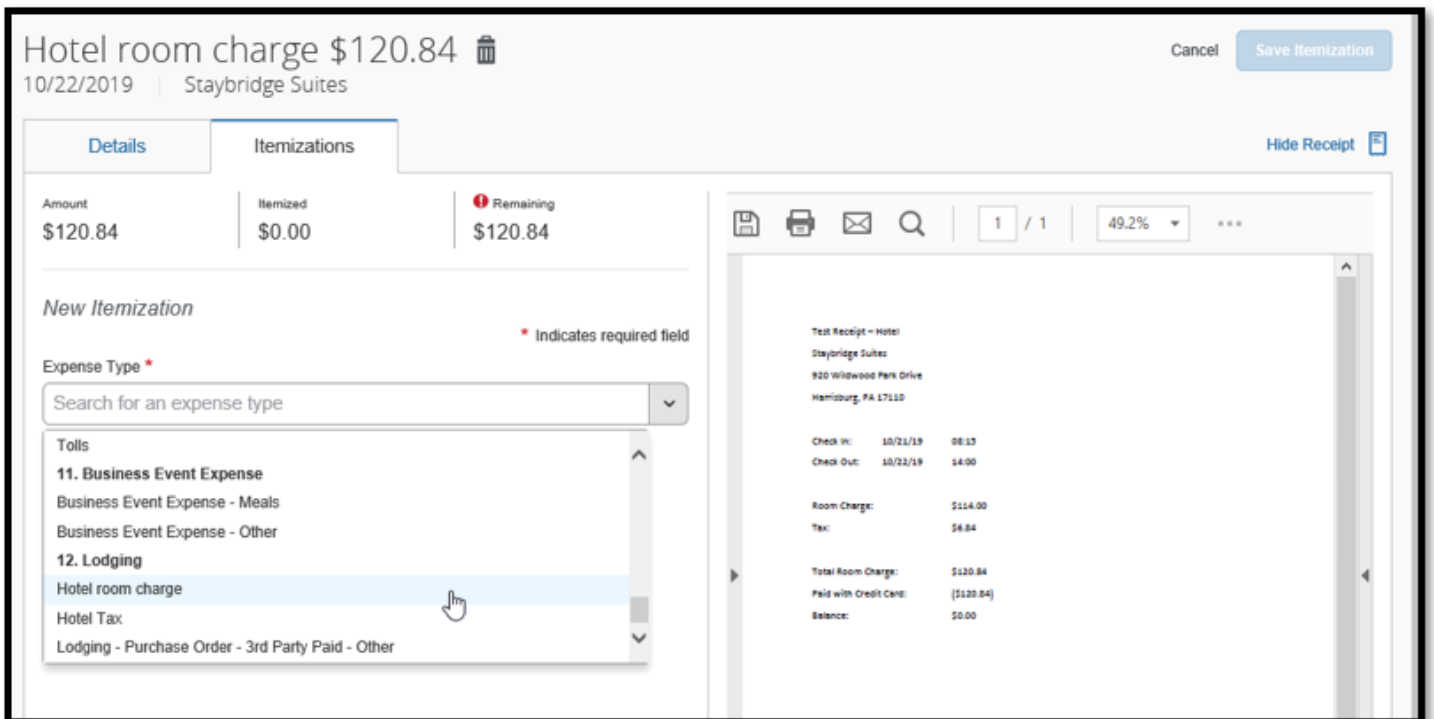
4. On the **New Itemization** page for the Hotel room charge:
   a. If the hotel room charge was for a one-night stay, click the Entry Type dropdown and select **Single Itemization** option from the list.
      i. Enter the required information in the resulting data fields.
   b. If the hotel room charge was for multiple nights, click the Entry Type dropdown and select the **Recurring Itemization** option from the list.
      i. If the room rate and taxes were the same every night, select the **The Same Every Night** tab and then enter the amount for the room rate and the amount(s) for the taxes.
      ii. If the room rate was not the same every night, select the **Not the Same** tab and enter the different room rates and the room taxes for each date.

5. When complete, select the **Save Itemization** button.

On the Itemizations tab, the Amount figure and Itemized figure should be the same and the Remaining figure should equal $0.00.   If not, you will need to correct the itemization.

6. When finished itemizing the hotel expenses, select the **Save Expense** button.

Add a Turnpike Toll

1. On the main Expense page, select the **Add Expense** button.

2. The **Add Expense** page 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 turnpike tolls. Select the **Tolls** expense type from the dropdown list.
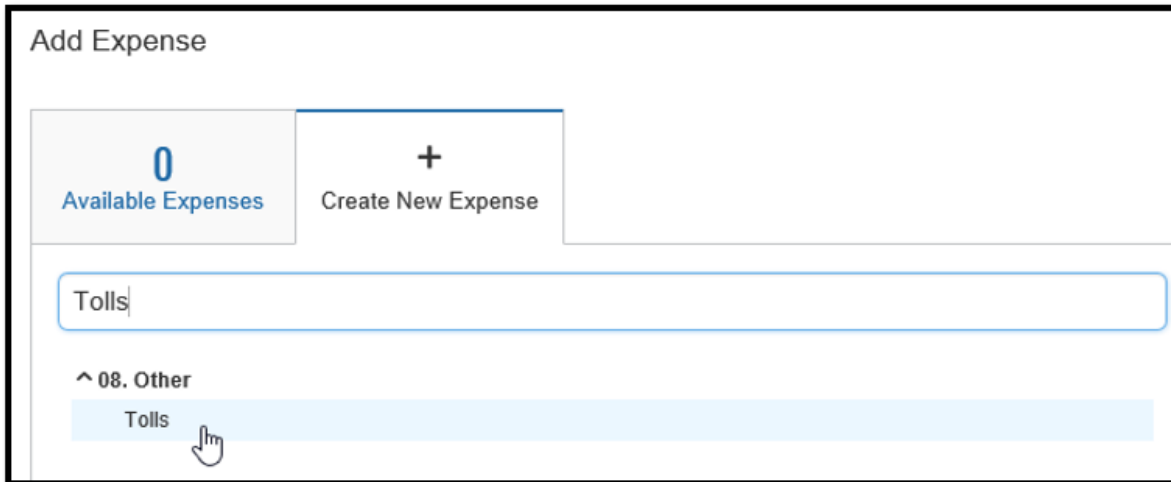
3. Complete the * required fields and any optional fields as needed.   Then select the **+ Attach Receipt Image** window to attach your itemized receipt.
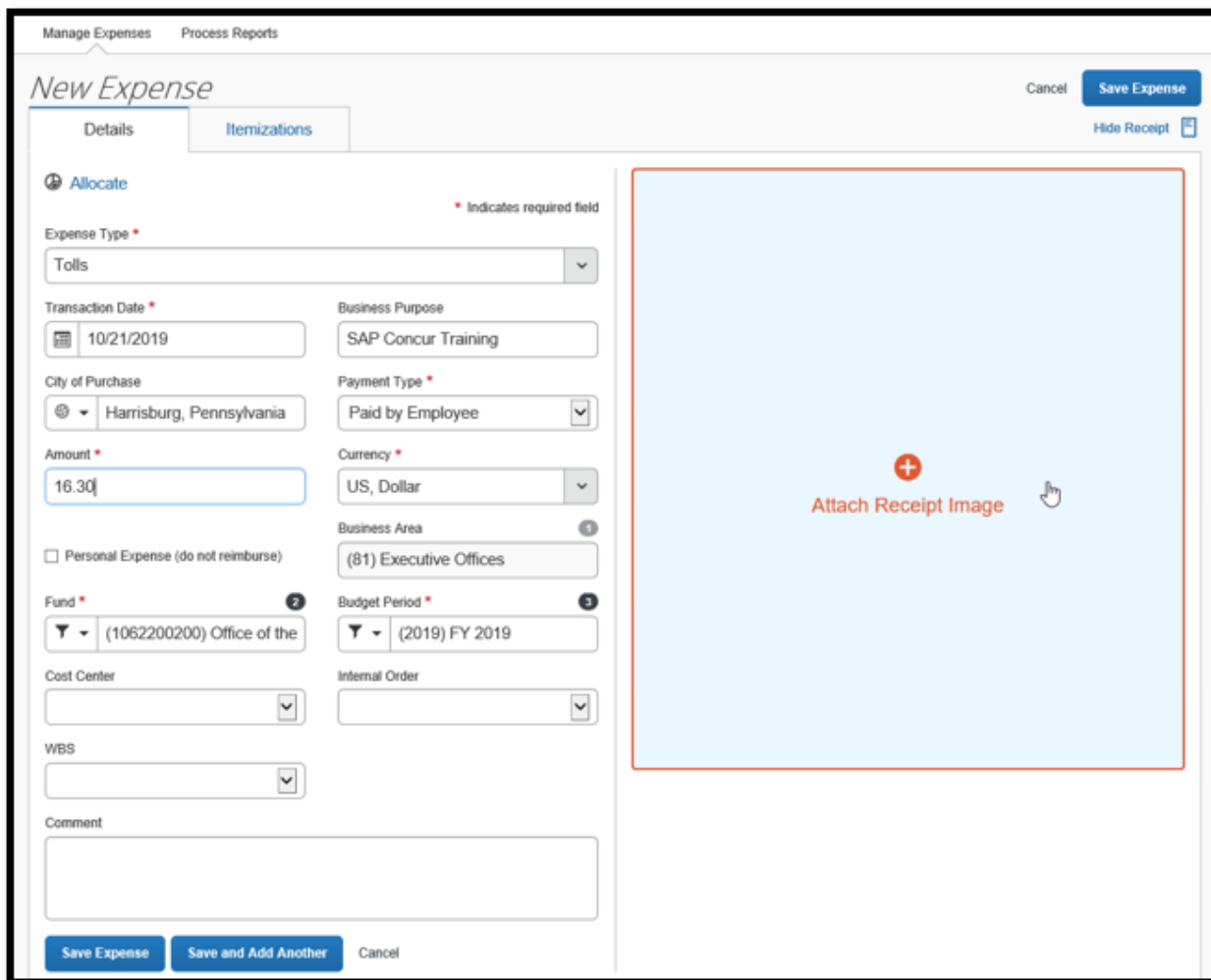
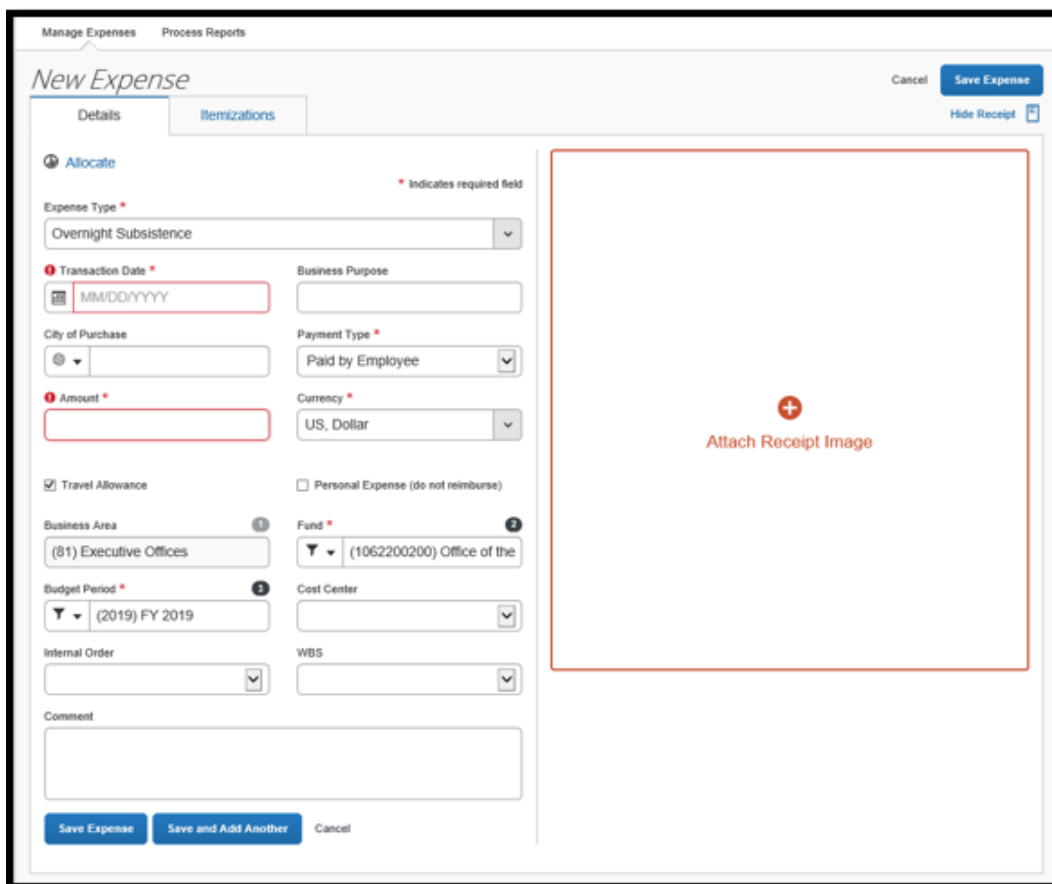4. When finished with this expense and you are ready to add another expense, select the **Save and Add Another** button.

Add Overnight Subsistence

1. The **Add Expense** page 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 overnight subsistence. Select the **Overnight Subsistence** expense type from the dropdown list.
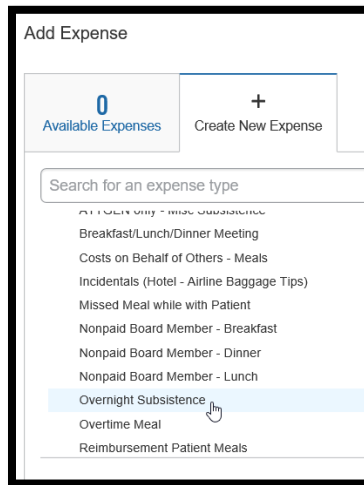
2. Complete the * required fields and any optional fields as needed.   Select the **+ Attach Receipt Image** window to attach your itemized meal receipt.

3. When finished, select the **Save Expense** button.

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.

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

*COPA - Detailed Report with Summary Data   ✕

☐ Show Itemizations

<div align="center">

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

</div>

Employee Name : Burns, Stephen R.

Employee ID : 00490162

*Business Area Description : Executive Offices

*HR Org Unit : 815800

*HR Org Unit Description : EX Bur of Cmwl Pyrl 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

Close   Print   Save as PDF   Email

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!