# 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 the **Home** dropdown in the top menu bar and select **Expense** under the **Applications** sub-menu. When the **Manage Expenses** page opens, click the **+ Create New Report** button.
   b) In the quick task bar, click **+ Start a Report**.
   c) In the **Expense Reports** section, click the **+** sign.
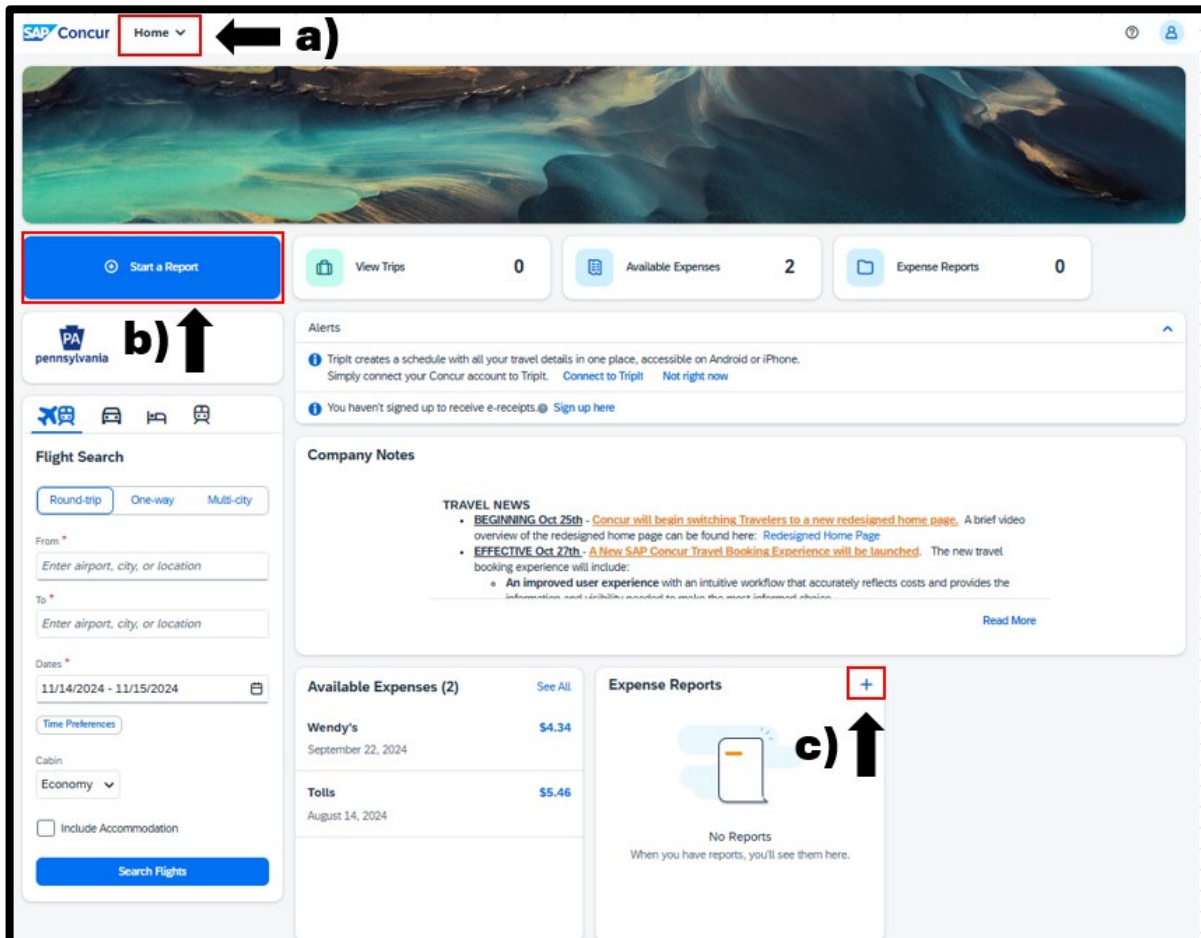
Complete the Report Header

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.

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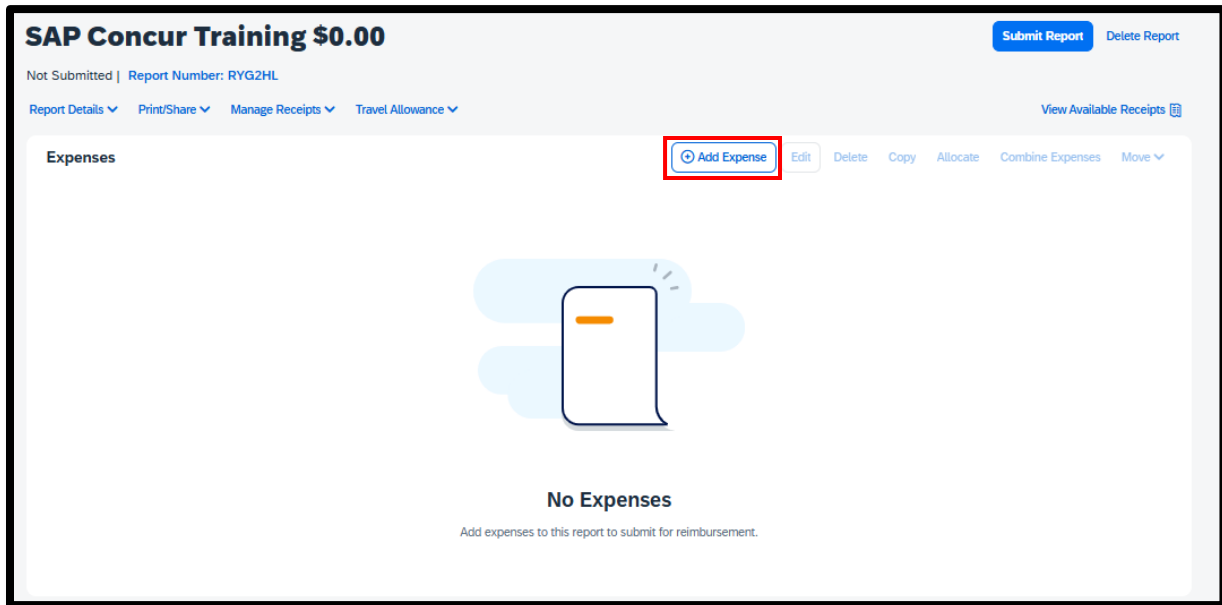

3. After the radio button is selected, click on the **Create Report** button to begin adding expenses.

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 to Report** window will be displayed with the **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.
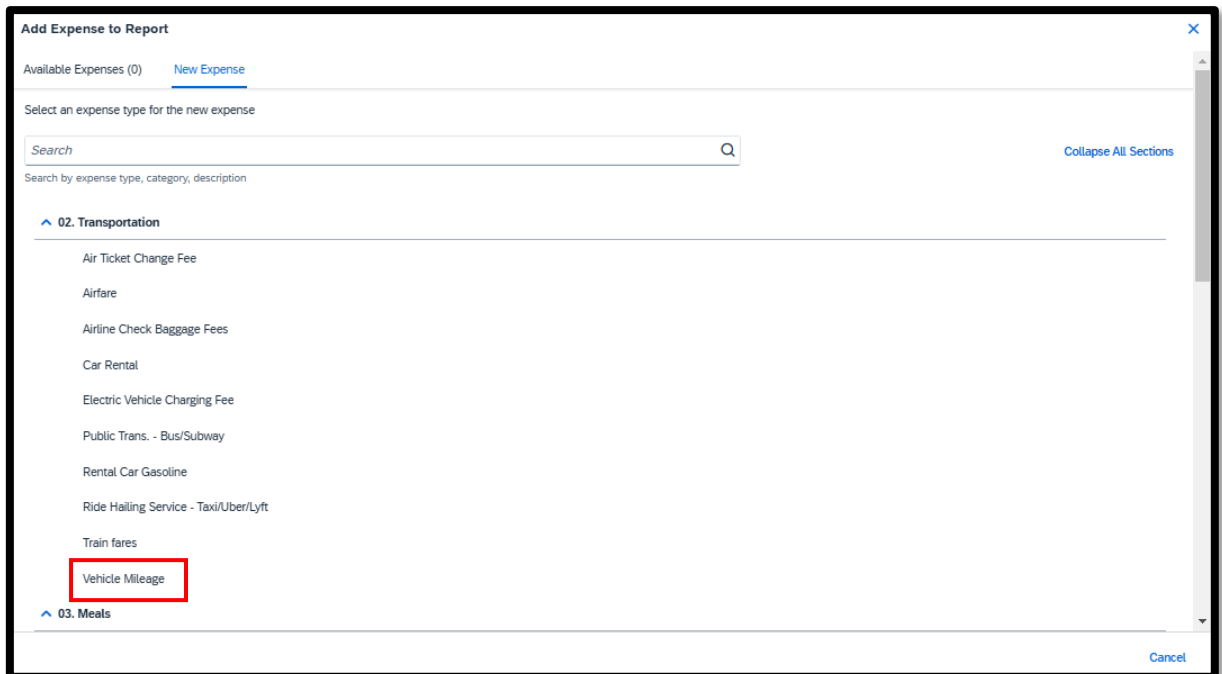
3. On the **New Expense** page with the **Details** tab selected. Complete the * required fields and any optional fields as needed.

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 mileage.

4. 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.
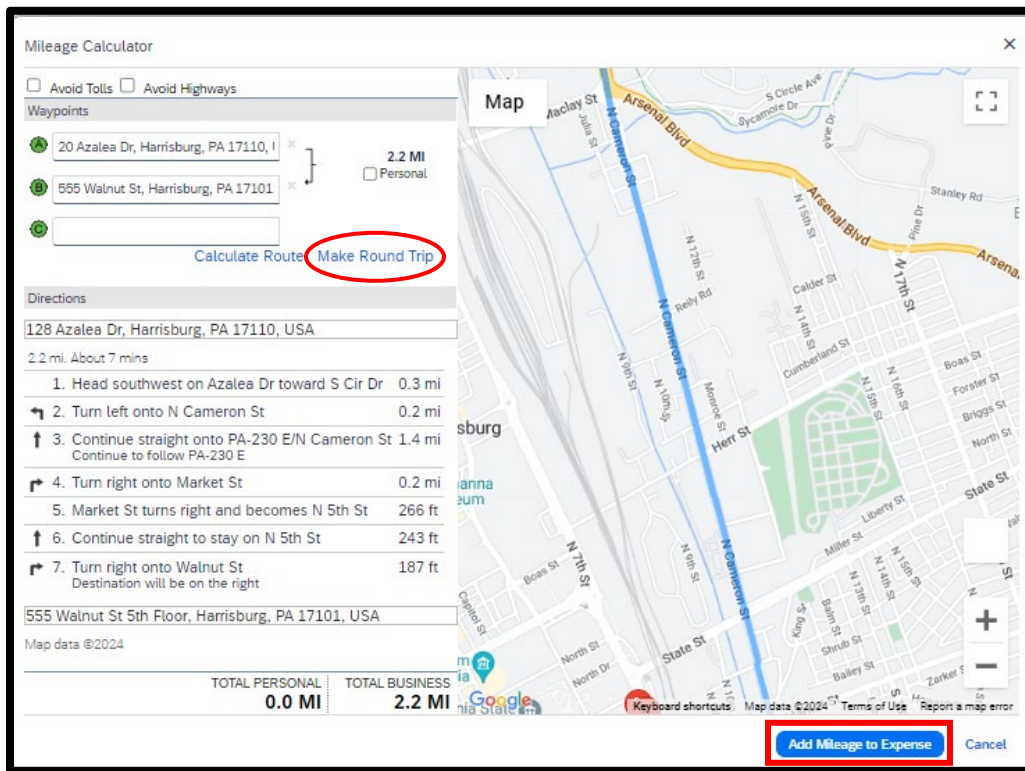
When complete, click the **Add Mileage to Expense** button.

5. The Vehicle ID field defaults to Noncompensated mileage. Click the dropdown and select the appropriate Vehicle ID for the mileage entry.
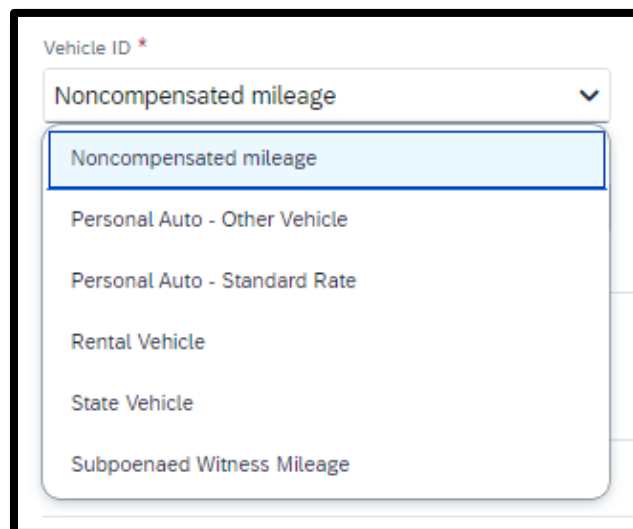
Attach a Receipt Image

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 **Add Receipt**.

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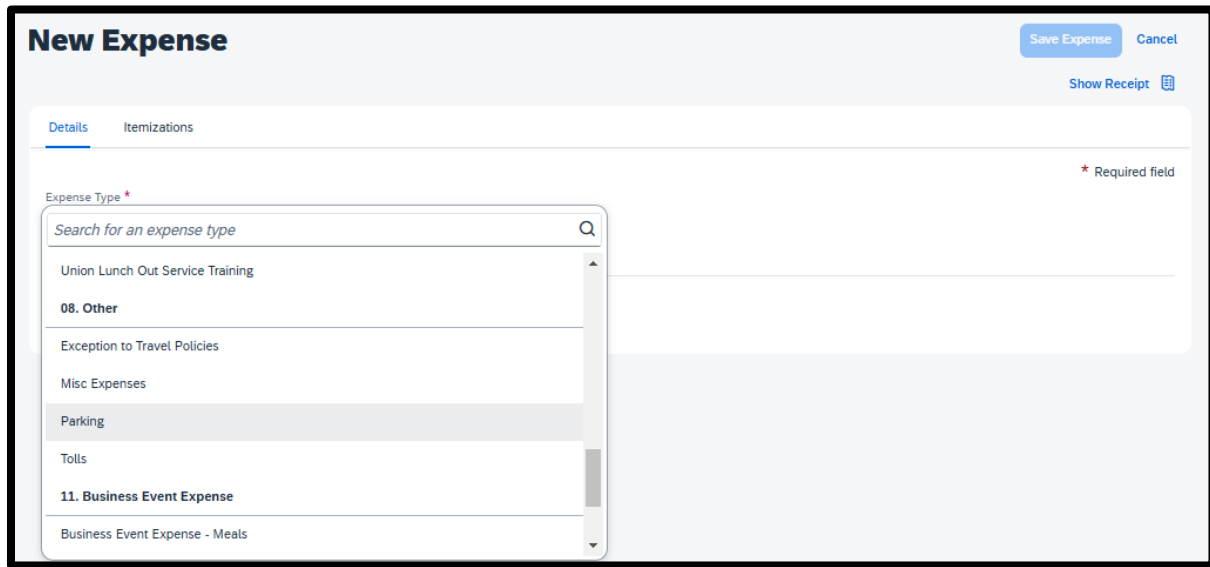
If finished entering expenses, click the **Save Expense** button. If more expenses need to be entered, click the **Save and Add Another** button. In this example, we will add another expense to the report for Parking. Select the **Save and Add Another** button.
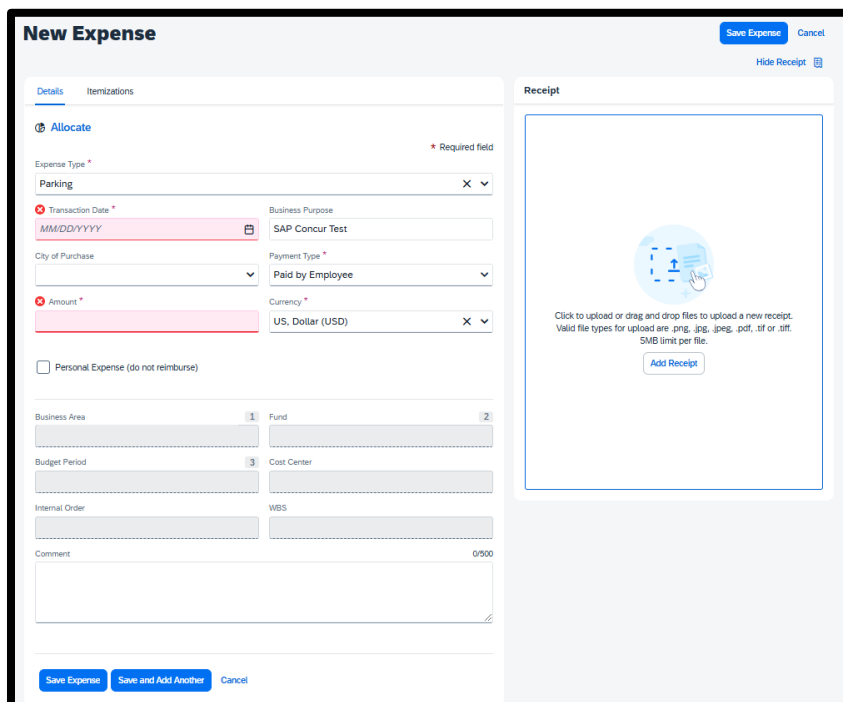
Add a Parking Expense

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.

2. Complete the required fields and any optional fields as needed.

3. Click in the Add Receipt 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.

3. 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.

View, Print, Save, or Email the Expense Report

1. On the main Expense page, click the **Print/Share** dropdown arrow and select *COPA – Detailed Report with Summary Data.

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

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 meet commonwealth travel policy requirements. Alerts may appear that need to be resolved to submit the report. Red Alerts must be cleared to submit the report. Yellow Alerts are informational and will not prevent submission of the report. When the Alerts are resolved, a window will appear indicating you were successful.

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