



Last Updated: 12/5/2024

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 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.

| Concur Home ~ | a) | | | 0 8 |
|--|--|--|---|-----|
| | | | | |
| Start a Report | View Trips 0 | Available Expenses 2 | Expense Reports | 0 |
| b) ↑ | Alerts | | | • |
| pennsylvania | Tripit creates a schedule with all your travel details in o Simply connect your Concur account to Tripit. Connect | | | |
| | You haven't signed up to receive e-receipts. Sign up | here | | |
| Flight Search Round-trip One-way Multi-dity From * Enter airport, city, or location To * | overview of the redesign • EFFECTIVE Oct 22ht - booking experience will • An improved use | Concur will begin switching, Travelers to a ner ed home page can be found here: Redesigned I New SAP Concur Travel Booking Experience nclude: r experience with an intuitive workflow that acc | forme Page <u>t will be launched</u> . The new travel urately reflects costs and provides the | |
| Enter airport, city, or location | | | Read More | |
| Dates * | | E | | |
| 11/14/2024 - 11/15/2024 | Available Expenses (2) See All Wendy's \$4.34 September 22, 2024 | Expense Reports | | |
| Economy 🗸 | Tolls \$5.46 August 14, 2024 | | | - |
| Include Accommodation | | No Reports When you have reports, you'll see them i | here. | |

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 prepulated with information from your profile and you will not be able to change them.

| Policy | Reason for Trip * | 3 | Trip Start Date * | Trip End Date * | * Required field |
|--------------------------------|---------------------------|-----|---------------------|---------------------------|------------------|
| | Reason for Trip | | | | Ë |
| *COPA-US Expense Policy – BCPO | | | MM/DD/YYYY | MM/DD/YYYY | U |
| Report Date | | | | | |
| | | | | | |
| Business Area * | 1 Fund * | | | 3 Cost Center | |
| 2 | × • | × × | × | ~ | |
| nternal Order 🕜 | WBS 🚱 | | | | |
| | | | | | |
| | | | | | |
| COPA Company Code (SAP) | Employee ID | E | Employee Group | Business Area Description | |
| COPA | | | | | |
| IR Org Unit | HR Org Unit Description | E | Employee Subgroup | Personnel Subarea | |
| | | | | | |
| Bargaining Unit | Employee Expense Grouping | Y | Work Address Street | Work Address City | |
| | | | | | |
| Vork Address Zip | HHQ Indicator | | Exception # | Activity Type * | |
| Jork Address Zip | HHQ INdicator | | :xception # | Activity Type * | ~ |
| | | | | | |
| Comment | | | | | 0/50 |

2. After completing the header information, select the radio button at the bottom of the page for "Yes, I require Travel Allowance". Travel Allowance is required if your report includes overnight travel expenses.

| Travel Allowance | |
|--|--|
| Select "Yes" if this report includes overnight travel. | |
| Yes, I require Travel Allowance | |
| No, I do not require Travel Allowance | |

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 <u>hotel</u> in the Arrival City field in order to properly determine the maximum travel allowances for lodging and subsistence.

| Trave | Allowances F | or Report: SAP Cond | cur Training | | | | | |
|-------|------------------|-----------------------|------------------------|---------------------------------|-----------------------|-------------------------------------|-------|-----------------|
| Crea | e New Itinerary | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary | | | | |
| Itine | ary Info | | | | | | | |
| | erary Name | | | | | | | |
| s | AP Concur Train | ing | | | | | | |
| | | | | | | New Itinerary Stop | | |
| A | Id Stop Del | ete Rows Import Iti | nerary | | | Departure City | | |
| | Departure | City†≞ | | Arrival City | Arrival Rate Location | Harrisburg, Pennsyl | vania | |
| No | Itinerary Rows F | ound | | | | Date | | Time |
| | | | | | | 03/10/2024 | Ë | 10:00 AM |
| | | | | | | Arrival City Arlington, Virginia | | |
| | | | | | | | | - |
| | | | | | | Date 03/10/2024 | Ë | Time 1:00 PM |
| | | | | | | L | | |

- 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 and click the **Save** button.

| Travel Allowances For Report: SAP Concur Training | | | | |
|---|--|--|--|-------------------------------------|
| Edit Itinerary Available Itineraries Expenses & Adjustments Reim | bursable Allowances Summary | | | |
| ttinerary Info Itinerary Name SAP Concur Training | | | New Itinerary Stop | |
| Add Stop Deletic Rovs Import Itinerary Departure City1 [±] Harrisburg, Pennsylvania 03/10/2024 10:00 AM | Arrivat City Artington, Virginia 03/10/2024 01:00 PM | Arrival Rate Location ARLINGTON COUNTY, US-VA, US | 03/15/2024 🛱 Arrival City Harrisburg, Pennsylvania Date | Time 10:00 AM Time 1:00 PM |

4. When the trip destinations are complete, review the itinerary for accuracy and click the **Next** button if no updates are necessary.

| Travel Allow | vances For Report: SA | P Concur Training | | | |
|---|---|------------------------|---|-----------------------------|-------|
| Edit Itinerar | y Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary | | |
| Itinerary In Itinerary N SAP Col Add Sto | ame ncur Training | nport ltinerary | | | |
| | Departure City†≞ | | Arrival City | Arrival Rate Location | |
| | Harrisburg, Pennsylvania 03/10/2024 10:00 AM | | Arlington, Virginia 03/10/2024 01:00 PM | ARLINGTON COUNTY, US-VA, US | · · · |
| | Arlington, Virginia 03/15/2024 10:00 AM | | Harrisburg, Pennsylvania 03/15/2024 01:00 PM | DAUPHIN COUNTY, US-PA, US | |

5. The Expenses & Adjustments tab will open to allow you to report if any meals were provided to you during the trip (i.e. lunch provided at a conference). Meals that were provided and consumed must be reported by checking the boxes that apply. In this example, no meals were provided.

| reate New Itinerary Available Itineraries | Expenses & Adjustments Reimbursable Allowances Summary | | |
|---|--|----------------|-----------------|
| Show dates from 💾 to | 60 | | |
| Date/Location†≞ | Breakfast Provided | Lunch Provided | Dinner Provided |
| 03/10/2024 Arlington, Virginia | | | |
| 03/11/2024 Arlington, Virginia | | | |
| 03/12/2024 Arlington, Virginia | | | |
| 03/13/2024 Arlington, Virginia | | | |
| 03/14/2024 Arlington, Virginia | | | |
| 03/15/2024 Arlington, Virginia | | | |

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

ADDITIONAL ITINERARY INFORMATION

- 1. An itinerary must have at least two lines; one for the departure date of your trip and the second for the return date. If your business trip included hotel stays in multiple locations, more than two lines should be added to the itinerary.
- 2. Record the city in which the hotel is located which may be different than the location of your business.
- 3. Do not add additional stops to your itinerary unless you are staying overnight in a different location.
 - You travel from Philadelphia to Harrisburg. From Harrisburg, you travel to Reading but return to a hotel in Harrisburg. You <u>do not</u> need to record Reading as a stop in your itinerary.
 - You travel from Philadelphia to Harrisburg. From Harrisburg, you travel to Reading and stay overnight in Reading. You <u>do</u> need to record Reading as a stop in your itinerary.
- 4. Do not create an itinerary for day travel. If your report includes day and overnight travel, only create an itinerary for the days you were in overnight travel status.

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.

| SAP Cor | ncur Tr | aining \$0 | .00 | | | | Submit Report | Delete Report |
|-------------------|---------------|-------------------|--------------------|---------------|-------------|-----------|-----------------------|----------------|
| Not Submitted F | Report Number | : KFIYXP | | | | | | |
| Report Details 🗸 | Print/Share V | Manage Receipts 🗸 | Travel Allowance 🗸 | | | | View Availa | ble Receipts 🗎 |
| Expenses | | | | O Add Expense | Edit Delete | Copy Allo | cate Combine Expenses | Move 🗸 |
| | | | | | | | | |
| | | | Add expenses t | No Expenses | ment. | | | |
| | | | | | | | | |

2. The **Add Expense** 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 state vehicle mileage. Select the **Vehicle Mileage** expense type from the dropdown list.

| Add Expense to Report | | × |
|---|----|-----------------------|
| Available Expenses (0) New Expense | | * |
| Select an expense type for the new expense | | |
| Search | Q | Collapse All Sections |
| Search by expense type, category, description | | |
| 02. Transportation | | |
| Air Ticket Change Fee | | |
| Airfare | | |
| Airline Check Baggage Fees | | |
| Car Rental | | |
| Electric Vehicle Charging Fee | | |
| Public Trans Bus/Subway | | |
| Rental Car Gasoline | | |
| Ride Hailing Service - Taxi/Uber/L | ft | |
| Train fares | | |
| Vehicle Mileage | | |
| ∧ 03. Meals | | |
| | | Cancel |

- 3. On the **New Expense** page with the **Details** tab selected. Complete the * required fields and any optional fields as needed. In this example, State Vehicle was selected 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 mileage manually.

| New Expense | | | Save Expense | Cancel |
|---------------------------------------|------------------|---------------------|------------------------|-------------|
| | | | Show Re | eceipt 🗎 |
| Details Itemizations | | | | |
| Allocate | | | * Ren | uired field |
| Expense Type * | | Transaction Date * | Purpose of the Trip * | |
| Vehicle Mileage | × | 03/10/2024 | SAP Concur Training | |
| From Location * | To Location * | Payment Type | Business Area | 1 |
| Harrisburg, PA | Arlington, VA | Paid by Employee | | |
| Fund 2 | Budget Period 3 | Cost Center | Internal Order | |
| | | | | |
| WBS | | | | |
| | | | | |
| | | | | |
| Vehicle ID * | Distance to Date | Distance * | Number of Passengers * | |
| State Vehicle 🗸 | 0 | 120 | 0 | |
| Amount * | Currency | Reimbursement Rates | | |
| 0.00 | US, Dollar (USD) | USD 0 per mile | | |
| Comment | | | | 0/500 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Save Expense Save and Add Another Can | cel | | | |
| | | | | |

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

Add a Hotel Expense

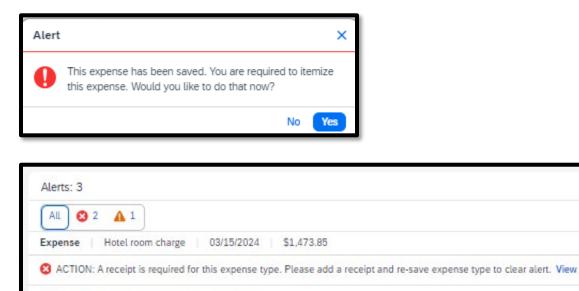
1. On the **New Expense** page, type Hotel in the search field or select the drop down and navigate through the list and select the **Hotel room charge** expense type from the list.

| New Expense | |
|---|------------------|
| Details Itemizations | |
| | * Required field |
| Expense Type * | |
| Search for an expense type | Q |
| Misc Expenses | * |
| Parking | |
| Tolls | |
| 11. Business Event Expense | |
| Business Event Expense - Meals | |
| Business Event Expense - Other | |
| 12. Lodging | |
| Hotel room charge | |
| Lodging - Purchase Order - 3rd Party Paid - Other | |
| | |

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.

| | | | | Save Expense Cancel |
|---------|--------------------|---|--|--|
| | | | | Receipt |
| | | * Required f | ield | |
| | | | | |
| | | × | ~ | |
| Nights: | Transaction Date * | | | |
| 5 | 03/15/2024 | | | |
| | Vendor | | _ | |
| | | | ~ | '_ _ |
| | Payment Type * | | _ | + |
| × • | Paid by Employee | | ~ | Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. |
| | Currency * | | | 5MB limit per file. |
| | US, Dollar (USD) | × | ~ | Add Receipt |
| | 5 | Vendor Payment Type * Paid by Employee Currency * | X Nights: Transaction Date* 5 03/15/2024 Vendor Payment Type* Paid by Employee Currency* | 5 03/15/2024 Vendor Payment Type * Paid by Employee Currency * |

3. SAP Concur requires the hotel room charges to be itemized and 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.

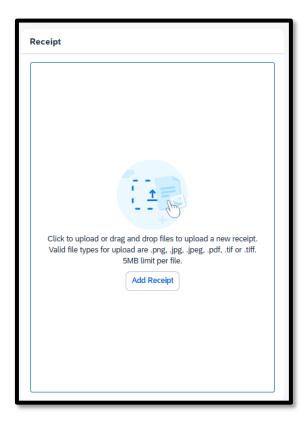


A You must attach a receipt image to this expense. View

8 Itemizations are required for this entry. View

Attach a Receipt Image to the Hotel Expense

1. On the **New Expense** page, click the Add Receipt button to attach a receipt or you may drag and drop the receipt to add it. 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.

| ← → Hotel room | cha | 5 | Save Expense Delete Expense | | | |
|-------------------------|---------|--------------------|-----------------------------|---|---|--|
| /15/2024 | | | | | | Hide Receip |
| Details Itemizations | | | | Receipt | | |
| IB Allocate | | | | | | * 6 : |
| Expense Type * | | | * Required field | | | |
| Hotel room charge | | | × × | COURTYARD EV MARAIOTY Countyand by Marriell [®] Avington Crystel City Resp | | |
| Date Range * | Nights: | Transaction Date * | | 2000 Rohmand Hwy, Alington, Va 2200 P 703.540 Marriot.com/WASCT | 13434 | |
| 03/10/2024 - 03/15/2024 | 5 | 03/15/2024 | Ë | | | Rom: 701 Rom Type: DBD0 Number of Guests: 1 |
| Business Purpose | | Vendor | | Artive: 10Mar24 Time: 04.15PM | Depart 15Mar24 | Rate: \$258.00 Dietr: LGB Time: 00.41AM Folio Number: 71457 |
| SAP Concur Training | | | ~ | DATE DESCRIPTION | | CHARGES CREDITS |
| City of Purchase * | | Payment Type * | | 10Mar24 Country Tax 10Mar24 County Tax 11Mar24 Room Charge 11Mar24 Room Charge 11Mar24 Country Tax | | 15.48 21.29 258.00 15.48 |
| Arlington, Virginia | × • | Paid by Employee | ~ | 12Mar24 Room Charge 12Mar24 Comparing Sales Tax 12Mar24 Comparing Sales Tax 12Mar24 Room Charge 12Mar24 Room Charge | | 21.23 258.00 15.48 21.39 258.00 15.48 |
| Amount * | | Currency * | | 1234x24 County Tax 144x24 Room Charge 144x24 Company: Sines Tax 144x24 County Tax 154x26 Nater Card | Card # MCX0000000000000 | 2129 258.00 15.48 2129 1473.85 |
| 1,473.85 | | US, Dollar (USD) | × • | Card Type: MASTERC App | ARD Card Entry: CHIP Approval C Label: MASTERCARD AID: A0005 | oder 026846 1000041010 |
| ✓ Travel Allowance | | | | As a Mercial Sciency Member yes could have size place gray values a sense of the Earth Using of See our "Writing & Coster Statement" on Marcell o | he hort desk. | BALANCE: 0.49 |

2. If the room rate and taxes were the same every night, select **Same daily amount** in the **Recurrence** field. If the room rate was not the same every night, select **Different daily amount** in the **Recurrence** field.

| ← → Ho | tel room chai | rge \$1,473.85 |
|------------------------|---------------|-----------------|
| /15/2024 | | |
| | | |
| Details Itemizations | | |
| Amount | Itemized | 8 Remaining |
| \$1,473.85 | \$0.00 | \$1,473.85 |
| New Itemizatio | , | |
| nem nemization | | * Required fiel |
| Expense Type * | | |
| Hotel room charge | | × • |
| Recurrence * 🕜 | | |
| Same daily amount | | ~ |
| Not recurring | | |
| Same daily amount | | |
| Different daily amount | | |
| | | |
| 03/11/2024 | | |
| 03/12/2024 | | |
| 03/13/2024 | | |

3. In this example, the room rate and taxes were the same every night.

| | lotel room ch | arge \$1,473 | 3.85 | | | | Save Itemizati | on Cancel |
|----------------------|------------------------|--------------|---------------------|------------------|---|--|--|-------------|
| 03/15/2024 | | | | | | | Hide | e Receipt 🏢 |
| Details Itemiza | ations | | | | Receipt | | | |
| Amount \$1,473.85 | Itemized \$1,473 | .85 | Remaining \$0.00 | | 1 / 1 - + - | গ | Ŧ | a : |
| New Itemiza | tion | | | * Required field | COURTYARD' Er Ankeit Confederation Market Antegen by State of the Weinderweiten Antegen by State of the Meridia wardbact | Reagen National Asport 33.543.343 | | - |
| Hotel room charg | ge | | | × • | | Raon: 701 Roon Type: D Number of Con Rate: \$156.00 | | |
| Recurrence * 🚱 | | | | | Arrive 10Mar24 Time 04 157 | Kask 3158.00 W Depart 13Mar24 Time OB-41Ab | Folio Number: 71457 | |
| Same daily amou | int | | | ~ | Let exception | | AARGES OREOTS 258.00 15.44 17.29 258.00 15.44 27.29 258.00 258. | |
| Date | Room Rate* | Room Tax | Tax 2 | Tax 3 | (Abepå Room Category Select Tele (Abepå Room Category Tele (Abepå Room Tele (Ab | | 21.29 205.00 15.46 21.29 25.00 15.48 | |
| 03/10/2024 | 258.00 | 15.48 | 21.29 | | | Cavel & MCXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9473.85 | |
| 03/11/2024 | 258.00 | 15.48 | 21.29 | | | BALANCE: | | |
| 03/12/2024 | 258.00 | 15.48 | 21.29 | | As a blankell thermany blanker, you south the plan anyor walkake member others. Evolution See our "Privacy & Cookin Statement" on Ma | | an annag ponta mo com anno, | |
| 03/13/2024 | 258.00 | 15.48 | 21.29 | | | | | . |
| 03/14/2024 | 258.00 | 15.48 | 21.29 | | Hotel Demo.pdf | | Uploaded: 1 | |
| (Amounts in USD |)) | | | Add Tax Fields | Remove | Add | ርታ Ob | en |
| Save Itemization | Save and Add Another G | ncel | | | | | | |

4. 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.

| ← 1 | | room charge \$1 | ,473.85 | | Save Expense Delete Expense Cancel |
|-------------------|--------------|------------------------|---------------------|---------------|--|
| | | | | | Hide Receipt 🗐 |
| Details | Itemizations | | | | Receipt |
| Amount \$1,473 | 3.85 | Itemized \$1,473.85 | Remaining \$0.00 | | 1/1 - + \$ ± ⊕ : |
| Itemiz | zations | €c | Edit Delete C | Copy Allocate | COURTYARD |
| | Date†≞ | Expense Type↓↑ | Requested↓↑ | | Countyerd by Marrise [®] Adrigon Crystal Cby Reagan National Aspon 2009 Richmond Hay, Adrigon, Va 2202 P 703 540 454 |
| | 03/10/2024 | Hotel room charge | \$258.00 | | Hanist.com/WASCT |
| | 03/10/2024 | Hotel Tax | \$36.77 | | Hom: 701 Hom: Type: D6D8 |
| | 03/11/2024 | Hotel room charge | \$258.00 | | Number of Cases: 1 Rate 1256:00 |
| | 03/11/2024 | Hotel Tax | \$36.77 | | DATE DESCRIPTION CHARGES CREDITS |
| | 03/12/2024 | Hotel room charge | \$258.00 | | 1584/24 Ream Charge 258.05 1584/24 County Stat 154.85 1584/24 County Stat 21.23 1584/24 County Stat 22.03 1584/24 County Stat 23.03 |
| | 03/12/2024 | Hotel Tax | \$36.77 | | 118.424 Concessory Sales Tais 15.48 118.424 Concessory Sales Tais 21.29 128.424 Reven Charge Tais 260.00 128.424 Reven Charge Tais 260.00 128.424 Concessor Tais 260.00 128.424 Concessor Tais 20.20 |
| | 03/13/2024 | Hotel room charge | \$258.00 | | 1334g/24 Room Charge 295.03 1344g/24 Onoperty Sales Tax 15.48 1344g/24 County Tax 21.28 1344g/24 County Tax 21.28 1444g/24 County Tax 21.54 1444g/24 County Tax 21.54 |
| | 03/13/2024 | Hotel Tax | \$36.77 | | 1414ar24 Chevrity Tax 21.29 1554ar24 Master Cand Card R MCX000000000000000000000000000000000000 |
| | 03/14/2024 | Hotel room charge | \$258.00 | | App Lake: MASTERCARD AD: AD00000001010 |
| | 03/14/2024 | Hotel Tax | \$36.77 | | As a Moniter Darroy Network, you could have served points baseds your feed team vacation today. Start earning points and Elia solata, plus eight exclusive member offers. Errold today at the force toda. |
| | | | | | Hotel Demo.pdf Uploaded: 11/14/2024 |
| | | | | | Remove Add C Open |

5. 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.

| SAP | AP Concur Training \$1,473.85 | | | | | | | ete Report |
|-----------------------|-------------------------------|--|-------------------|---------------------|-----------------------|------------------------|-----------|------------|
| ot Subm teport Def | | rt Number: KFIYXP t/Share ✔ Manage Receipts √ | Travel Allowance | | | View Ava | ailable R | Receipts 🗐 |
| Expe | ises | | | • Add Expense | Edit Delete Copy Allo | cate Combine Expen | ses I | Move 🗸 |
| | Receipt↓↑ | Payment Type↓↑ | Expense Type↓↑ | Vendor Details↓↑ | Date↓F | Requested↓↑ | | ~ |
| 0 | | Paid by Employee | Hotel room charge | Artington, Virginia | 03/15/2024 | \$1,473.85 Itemized | | ~ |
| | | Paid by Employee | Vehicle Mileage | | 03/10/2024 | \$0.00 | | |
| | | | | | | \$1,473.85 | | |

2. The **Add Expense** page 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 turnpike tolls. Select the **Tolls** expense type from the dropdown list.

| Add Expense to Repo | rt |
|-----------------------------|---------------------|
| Available Expenses (0) | New Expense |
| Select an expense type fo | r the new expense |
| toll | |
| Search by expense type, cat | tegory, description |
| ∧ 08. Other | |
| Tolls | |
| | |

3. Complete the * required fields and any optional fields as needed. Click the **Add Receipt** button to attach a receipt or you may drag and drop the receipt to add it.

| Details Itemizations | | | |
|----------------------|-----|---------------------|------------------|
| 18 Allocate | | | |
| | | | * Required field |
| Expense Type * | | | |
| Tolls | | | × |
| Transaction Date * | | Business Purpose | |
| 03/10/2024 | Ë | SAP Concur Training | |
| City of Purchase | | Payment Type * | |
| Arlington, Virginia | × • | Paid by Employee | ~ |
| Amount * | | Currency * | |
| 11.00 | | US, Dollar (USD) | × × |

4. When finished with this expense and you are ready to add another expense, select the **Save and Add Another** button.

| Details Itemizations | | Receipt |
|--|--|--|
| Allocate Expense Type * | * Required field | Q Q C C |
| Tolls | × ~ | |
| Fransaction Date * | Business Purpose | E ZPass |
| 03/10/2024 | SAP Concur Training | |
| City of Purchase | Payment Type * | AWAY AGENCY TOLL \$11.00 Posting Date/Time 08/14/2024 02:09:38 |
| Arlington, Virginia X 🗸 | Paid by Employee | Posting bater time Ustrat/2020 02:09:58 The duration of this trip was 1 hour and 1 minute |
| Amount * | Currency * | |
| 11.00 | US, Dollar (USD) X V | Exit Details Transponder # |
| Personal Expense (do not reimburse) | | Estitucation Esti Duerfine Esti Luce Cass |
| | Fund 2 | End Daw/Time Ends Class Entry Details Entry Location Intry Gaser |
| | Fund 2 (1620500000) Gen Govt Operations | En Dawline Brand Cass Entry Details tory Lectors Tory Details tory Lectors Tory Details |
| Business Area 1 | | Exit Data/Time Brit Jane Class Entry Details Entry Loation Time Time |
| Business Area 1 (17) Public utility Commission | (1620500000) Gen Govt Operations | En Dawline Brand Cass Entry Details tory Lectors Tory Details tory Lectors Tory Details |
| Susiness Area 1 (17) Public utility Commission Sudget Period 3 | (1620500000) Gen Govt Operations | for Daw/Firme Carso Entry Details Entry Leasano Proy Carso Proy Lana Proy Lana |
| Budiness Area 1 (17) Public utility Commission Budget Period 3 (2024) FY 2024 | (1620500000) Gen Govt Operations | TolLipg |
| Jusiness Area 1 (17) Public utility Commission Budget Period 3 (2024) FY 2024 Internal Order | (1620500000) Gen Govt Operations Cost Center WBS | TolLipg |

Add Overnight Subsistence

1. The **New Expense** page will be displayed with the **Details** 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.

| New Expense | |
|--|------------------|
| Details Itemizations | |
| Expense Type * | * Required field |
| Search for an expense type | Q |
| Nonpaid Board Member - Lunch | |
| Overnight Subsistence | |
| Overtime Meal | |
| Reimbursement Patient Meals | |
| Union Contracted Lunch | |
| Union Lunch > 50mls/multi day/no hotel | |
| Union Lunch Out Service Training | |

2. Complete the * required fields and any optional fields as needed. Click the **Add Receipt** button to attach a receipt or you may drag and drop the receipt to add it.

| New Expense | | Save Expense Cancel |
|---|-------------------------------------|--|
| Details Itemizations | | Receipt |
| Konstanting Konstanti | * Required field | |
| Overnight Subsistence | × ~ | |
| S Transaction Date * | Business Purpose | |
| MM/DD/YYYY | SAP Concur Training | |
| City of Purchase | Payment Type * | |
| Arlington, Virginia 🛛 🗙 🗸 | Paid by Employee | '_ <u>-</u> |
| Amount * | Currency * | |
| | US, Dollar (USD) X V | Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. |
| ✓ Travel Allowance | Personal Expense (do not reimburse) | 5MB limit per file. |

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

| letails Itemizations | | Receipt |
|--|-------------------------------------|--|
| ð Aliocate | * Required field | ■/1 -+ Ø ± ē : |
| «pense Type * Overnight Subsistence | × • | COURTYARD BY MARKIDIT Crystel City |
| ansaction Date * | Business Purpose | 2899 Jefferson Davis Highway Ar Hugton, VA 22202 (2005)49-3434 |
| 03/13/2024 | SAP Concur Training | (703)54-3434 8 1 3 T R D ant drink connect 99970000 MCBILE |
| ity of Purchase | Payment Type * | СНК 8129 8ST 1 1) ## 73 7:51 РИ |
| Arlington, Virginia X 🗸 | Paid by Employee | HOBTLE ORDER 18,1580003 14,50 |
| mount * | Currency * | No garlid verw dwread. Ndd olde of wa yn. Bacan well danw. |
| 15.95 | US, Dollar (USD) X V | FR315 SRFTETR, 114.50 |
| Travel Allowance | Personal Expense (do not reimburse) | 7:51 PH TOTAL DUE #15,95 extra |
| usiness Area 1 | Fund 2 | 800 KORLA |
| udget Period 3 | Cost Center | 1394781 Thesh yes for Jahara us |
| | | Meal Demo.pdf |
| ternal Order | WBS | Remove |
| omment | 0,600 | |
| | | |
| | | Kemove |

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.

| : Subm | itted Repo | rt Number: KFIYXP | | | | | | |
|----------|---------------------------|-----------------------------------|-----------------------|---------------------|--------------------|-------------------------|----------|-----------|
| port Det | ails 🗸 🛛 Print | /Share 🗸 Manage Receipts 🗸 | Travel Allowance V | | | View Ava | ilable R | eceipts [|
| Exper | nses *CO | PA - Detailed Report with Summary | Data | • Add E | Edit Delete Copy | Allocate Combine Expens | ses N | love 🗸 |
| | Receipt↓↑ | Payment Type↓↑ | Expense Type↓↑ | Vendor Details↓↑ | Date↓ [₽] | Requested↓↑ | | ~ |
| | in It _{ena} i | Paid by Employee | Hotel room charge | Arlington, Virginia | 03/15/2024 | \$1,473.85 Itemized | | ~ |
| | 100 | Paid by Employee | Overnight Subsistence | Arlington, Virginia | 03/13/2024 | \$15.95 | | |
| | | Paid by Employee | Tolls | Arlington, Virginia | 03/10/2024 | \$11.00 | | |
| | | Paid by Employee | Vehicle Mileage | | 03/10/2024 | \$0.00 | | |
| | | | | | | \$1,500.80 | | |

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

| *COPA - Detailed Report with Summary Data | × |
|---|---|
| Show Expenses Show Itemizations | * |
| Expense Report | |
| Report Name : SAP Concur Training | |
| Report Key : 691120 | |
| Report Date : 11/14/2024 | |
| Report Start Date : 03/10/2024 *Report End Date : 03/15/2024 | |
| | |
| Employee Name : | |
| Employee ID : | |
| *Business Area Description : | |
| *HR Org Unit : | |
| *HR Org Unit Description : | |
| *Employee Subgroup : *Personnel Subarea : | |
| *Employee Expense Grouping : | |
| | - |
| Close Print Save as PDF Ema | a |

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.

| Submitted Report Number: KFIYXP | | | | | View Available Receipts € | | | | |
|-----------------------------------|--------------------------|------------------|-----------------------|---------------------|--|------------------------|--|---|--|
| Expenses | | | | (Add | OAdd Expense Edit Delete Copy Allocate Combine Expenses Move ✓ | | | | |
| | Receipt↓↑ | Payment Type↓↑ | Expense Type↓↑ | Vendor Details↓↑ | Date↓ [₽] | Requested↓↑ | | ~ | |
| | аны 18 1, | Paid by Employee | Hotel room charge | Arlington, Virginia | 03/15/2024 | \$1,473.85 Itemized | | ~ | |
| | 1283 y | Paid by Employee | Overnight Subsistence | Arlington, Virginia | 03/13/2024 | \$15.95 | | | |
| | | Paid by Employee | Tolls | Arlington, Virginia | 03/10/2024 | \$11.00 | | | |
| | | Paid by Employee | Vehicle Mileage | | 03/10/2024 | \$0.00 | | | |
| | | | | | | \$1,500.80 | | | |

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

