

# Travel Expense Report

A **Travel Expense Report** will be required if the traveler goes on a University business trip. You must identify all travel expenses that were incurred throughout the trip.

Travelers may request reimbursement for costs incurred before the actual dates of any approved travel by submitting a completed travel expense report, including supporting documentation. You will follow this process below regardless of when the purchases took place.

These instructions will cover how to create and/or edit a Travel Expense Report.

*Click on any of the links below to skip ahead to that section.*

# Table of Contents:

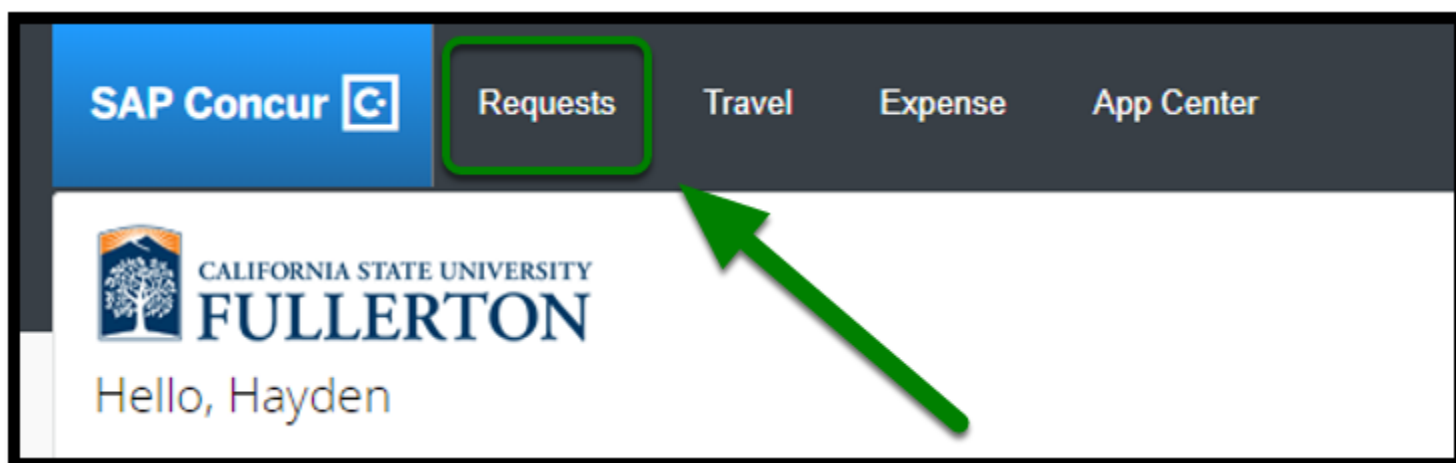
- Creating Expense Report by Active Request (Recommended)..... 3
- Creating Expense Report from Scratch ..... 4
- Editing Expense Report..... 6
- Report Header ..... 7
- Adding Expenses..... 8

💡 If you need assistance with logging into Concur, please go to [Logging into Concur](#).

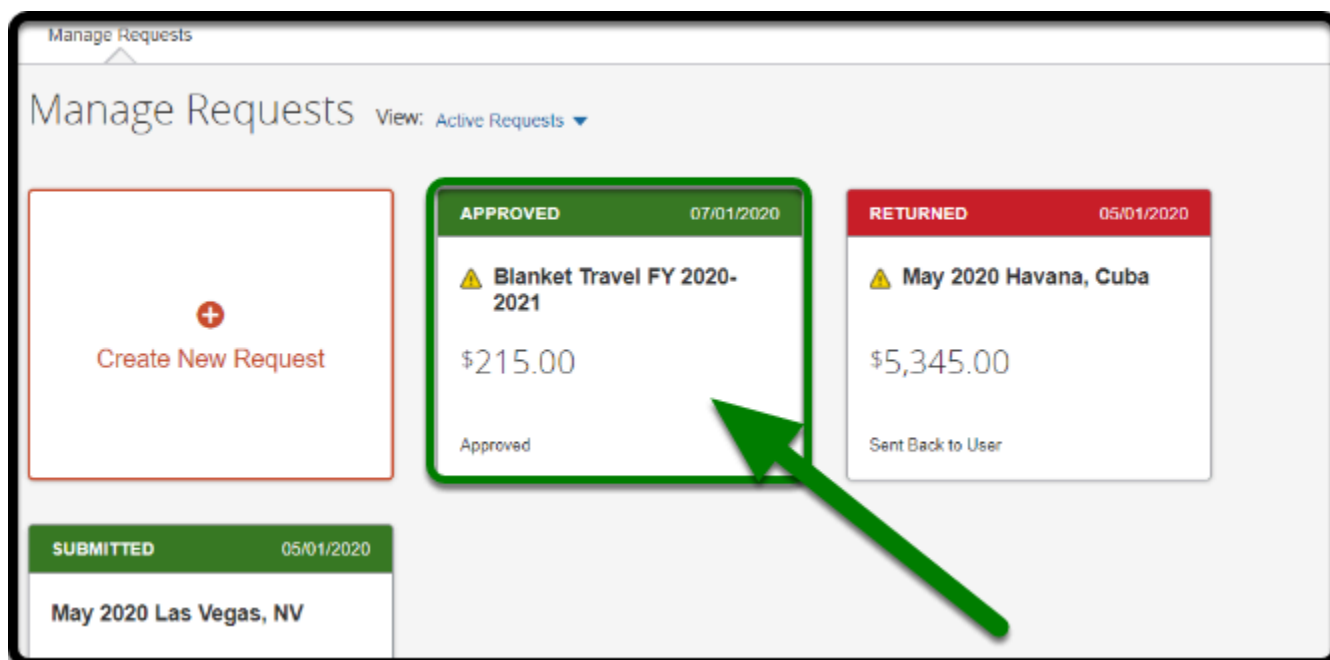
## Creating Expense Report through Active Request

ℹ Recommended method if you have an approved Travel Request in Concur.

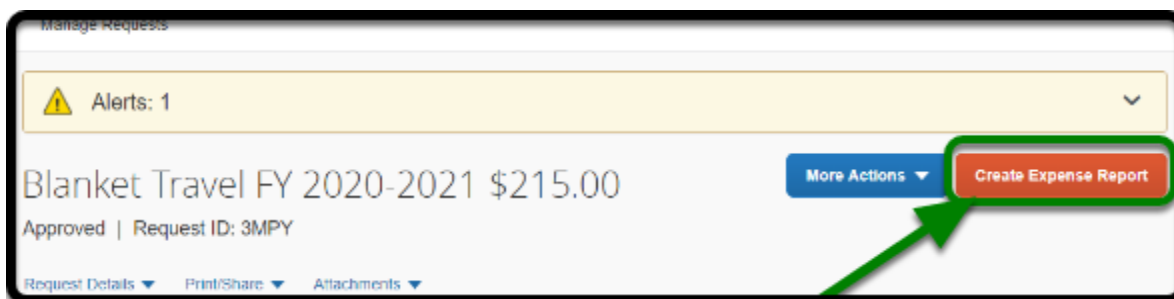
**Step 1:** If you have an approved Travel Request in Concur, click on the **Requests** tab.




**Step 1a:** Under Manage Requests, click on request that you want to create an Expense Report for.




**Step 1b:** To create an Expense Report for your Travel Request, click on the **Create Expense Report** button.



 For assistance with filling out your Report Header, go to [Report Header](#).

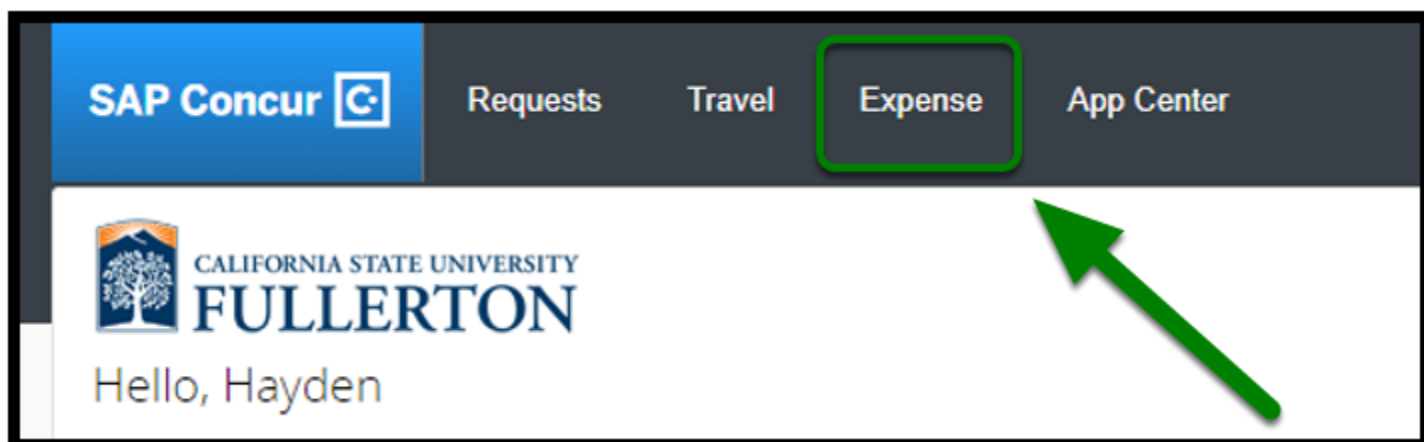
[back to top](#)

## Creating Expense Report from Scratch

 Recommended method if you have an approved paper Travel Request.

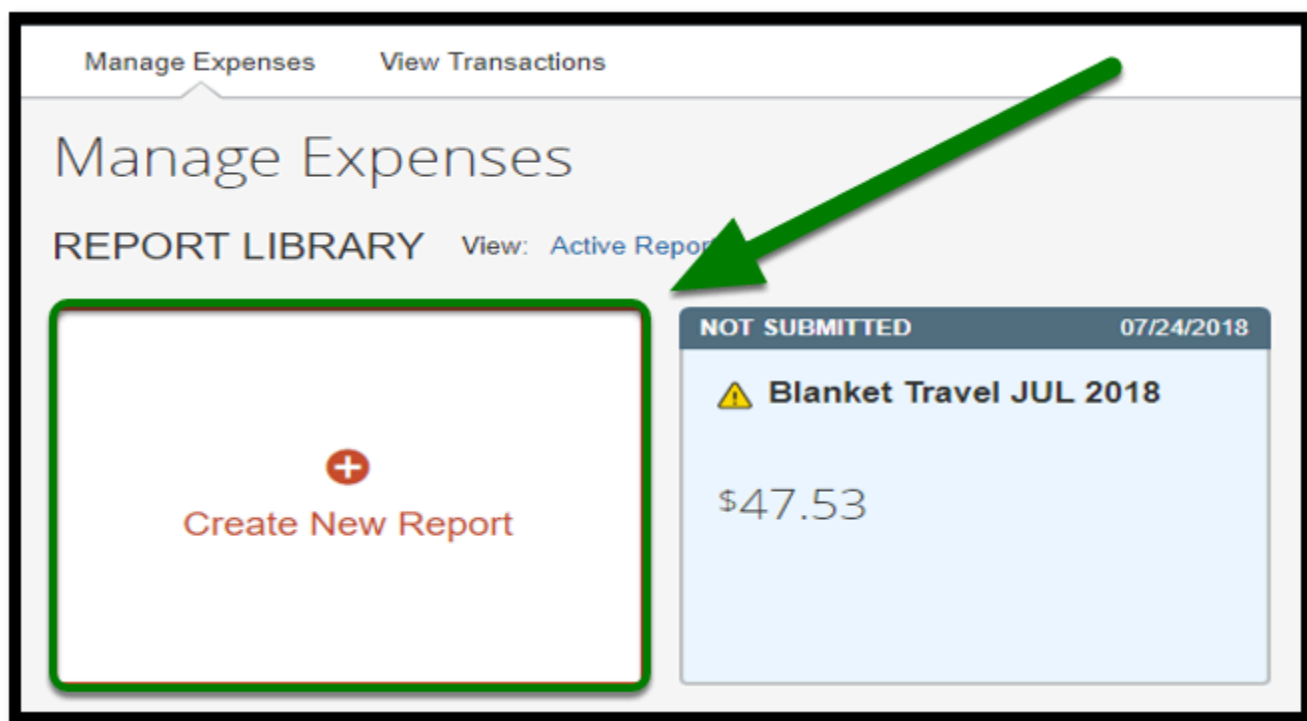
**Step 1a:** Log into Concur using the CSUF Portal. You will see your Concur dashboard.

Click on **Expense** tab.



**Step 1b:** Click on **Create New Report**.

This step will create the Expense Report first, and then allow you to choose which expense(s) to add.



💡 For assistance with filling out your Report Header, go to [Report Header \(UI Upgrade\)](#).

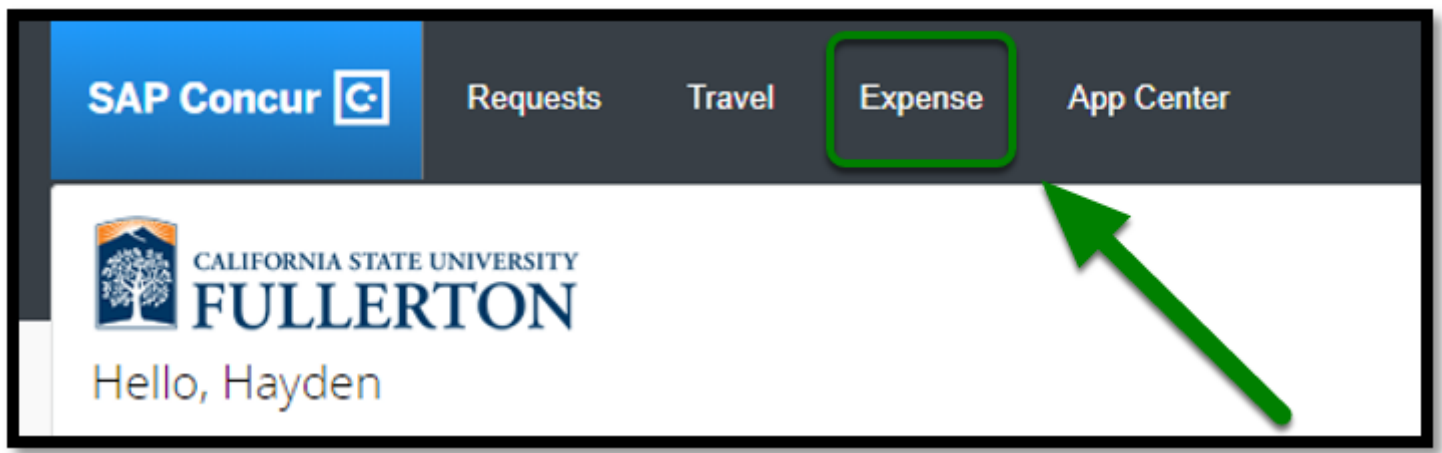
[back to top](#)

## Edit an Expense Report

**i** Recommended if you already created an Expense Report and would like to make changes before submitting.

**Step 1a:** Log into Concur using the CSUF Portal. You will see your Concur dashboard.


Click on **Expense** tab.




**Step 1b:** If you have already created an Expense Report, select on the Expense Report you would like to edit.


# Manage Expenses

REPORT LIBRARY View: Active Reports ▼




  
Create New Report

NOT SUBMITTED 07/23/2018


 JUL 2018 San Diego, CA

\$1,898.42

 For assistance with submitting an Expense Report, proceed to [Submitting an Expense Report](#).

[back to top](#)

## Report Header

 Please click on [Report Header \(UI Upgrade\)](#) for instructions on how to complete your Report Header.

## Adding Expenses



Please click on any of the following links for instructions on how to add the following common expenses:

- [Actual Per Day Meal Expense \(UI Upgrade\)](#)
- [Personal Mileage \(UI Upgrade\)](#)
- [Hotel Itemization \(UI Upgrade\)](#)
- [Adjustments Expense Type \(UI Upgrade\)](#)

## Travel Expense Report Checklist



If you would like to use a checklist, click on the [Travel Expense Report Checklist](#).

## Need more help?



Contact Concur Support at [concur@fullerton.edu](mailto:concur@fullerton.edu) or at 657-278-3600.