



Create a New Expense Report w/ Travel Allowance (Meals Per Diem) and Travel Charges from a Completed Trip Itinerary

1	Go to the Trip List on the <i>My Concur</i> page
2	Click on the green arrow icon  next to the completed trip you wish to create an Expense Report for.
3	The Report Header window will open.
4	The current system date defaults in the Report Date field.
5	Update the Report Name field to include the travel dates in the Report Name. (i.e. Banking Conference 0612 to 0618)
6	Click on the arrow in the Trip Type field and select the appropriate trip type: In-State Travel, International Travel or Out Of State travel from the drop down menu.
7	Click on the calendar icon in the Trip State Date field, click on trip start date.
8	Click on the calendar icon in the Trip End Date field, click on trip end date.
9	In the Purpose of Trip field, enter the business purpose for the expense report.
10	Enter any necessary comments in the Comments box.
11	If your agency uses Pre-Trip Travel Requests, you must link the approved Request to the Expense Report. Click on Add in the Travel Request section. If not, go to #10.

12	Select the applicable Travel Request from the list and click Add .
13	Click Next .
14	A Travel Allowances box opens. Travel Allowances = Meals Per Diem in GTE. Click on Yes to open the entry form
15	Make certain the Selection field is correct for the meal type. (Regular In State or GSA Out of State).
16	Make certain the Standard Itinerary is displayed. You should see a column heading that says New Itinerary Stop . If that <u>does not</u> appear, click the Go To Standard Itinerary button at the bottom of the window and continue to next step.
17	Click on Import Itinerary
18	Select the trips and charge items from the Select Trips and Charges to use to create this itinerary box that opens and click on Import .
19	The Travel Allowances for Report box opens (Step 1 Edit Itinerary) with trip information populated. Click on Next .
20	The Travel Allowances for Report box opens (Step 2 Available Itineraries) with trip information populated. Click on Next .
21	The Travel Allowances for Report box opens (Step 3 Expenses and Adjustments) with trip information populated. Make any adjustments for meals you did not have to pay for.
22	Click on Create Expenses .
23	The new Expense Report for this trip will open with the trip expenses from your

	Trip Itinerary as well as any allowable Meals Per Diem meeting the Travel Policy criteria populated.
24	You may add any additional out of pocket expenses, attach required receipts, and Submit the expense report.