

# How to Report Travel Expenses

## Airfare, Taxi, and Personal Car expenses

### Sample Travel Report

1. Log into iBuy Expense Reporting (SAP Concur) and select the **Expense** tab to open your Expense home page
2. Click + **Create New Report** and complete the required Report Header information marked with \*. Your **Report Name** can be any that reflects the report content and/or the reporting timeframe, such as B. Smith Trip May 2018. Note that your **Grant/Non-Grant** and **Oracle Alias** fields auto-populate. Click **Create Report** to go to the report processing page.

Create New Report x

\* Indicates required field

Report Name *	Report Date	Travel Destination/Business Purpose *
<input type="text" value="Sample Travel Report"/>	<input type="text" value="06/01/2018"/>	<input type="text" value="Reporting travel expenses"/>
Start Date *	End Date *	Report Key
<input type="text" value="05/03/2018"/>	<input type="text" value="05/05/2018"/>	<input type="text"/>
Grant/Non Grant *	Oracle Alias *	Expense Report For:
<input type="text" value="(GL) Non-Grant"/>	<input type="text" value="(634003) PROCUREMENT DIVISION"/>	<input type="text" value="Test"/>
:		
<input type="text" value="User105"/>		
Comment		
<input type="text" value="How to report airfare, taxi, and personal car expenses.&lt;br/&gt;How to match an airfare expense with its trip itinerary"/>		

Once the P-Card charge is transmitted from JP Morgan-Chase to Concur, it will appear in the **Available Expenses** queue. The user imports the P-Card expenses from this queue into their report. These appear on the **Report Page**, as shown below

**NOTE:** A **Trip Itinerary** is an informational document that matches most travel purchases may also appear in this queue. These are not duplicate charges, though they show with the same \$ amount as the actual charge. Click the box for the JP Morgan-Chase credit card charge and the box for its matching Trip Itinerary, then click the **Combine Expenses** tab.

## Sample Travel Report \$729.49

Not Submitted

[Delete Report](#) [Submit Report](#)

Report Details ▾ Print/Share ▾ Manage Receipts ▾

[Add](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to ▾](#)

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53101-US AIRFARE EXPENSE	United Airlines Seattle, Washington	02/07/2019	\$695.00
<input checked="" type="checkbox"/>			TRIP ITINERARY	53101-US AIRFARE EXPENSE	United Airlines Seattle, Washington	02/07/2019	\$695.00
<input type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53103-US LOCAL TRANSPORTATION	Yellow Cab of Seattle	02/07/2019	\$22.50
<input type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53103-Personal Car Mileage		02/09/2019	\$11.99

This will create a single expense line for your report, as shown below.




# Sample Travel Report \$729.49

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<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53101-US AIRFARE EXPENSE	United Airlines Seattle, Washington	02/07/2019	\$695.00
<input type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53103-US LOCAL TRANSPORTATION	Yellow Cab of Seattle	02/07/2019	\$22.50
<input type="checkbox"/>			JP Morgan Ch Corp Card CB	53103-Personal Car Mileage	ial	02/09/2019	\$11.99

The expense **Details Page** is where all details of the expense are entered. To go to this page, either double-click its line on the Report Page or select its box and click the **Edit** button

Alerts: 1

Travel \$695.00 Delete Report Submit Report

Not Submitted

Report Details Print/Share Manage Receipts

Add Edit Delete Copy Allocate Combine Expenses Move to

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			JP Morgan-Chase	53101-US AIRFARE EXPENSE	Seattle, Washington	09/05/2018	\$695.00
							\$695.00

- a. Click the **Add** button and select **Available Expenses** for a P-Card expense. (You would click + **Create New Expense** for an out-of-pocket expense)

Add Expense

0 Available Expenses + Create New Expense

No Expenses  
When expenses come in, they will be added to this list.

Close Add To Report

- b. Enter **Expense Type** 53101-US AIRFARE EXPENSE and complete all required fields marked with \*.
- c. Attach the receipt and click **Save Expense**. This returns you to the Report Page

02/07/2019 | United Airlines

Details

Itemizations

Hide Receipt 📄

🔄 Allocate

\* Indicates required field

Expense Type \*

53101-US AIRFARE EXPENSE

Transaction Date \*

📅 02/07/2019

City \*

🌐 Seattle, Washington

Business Purpose \*

Test

Ticket Number

UA12345

Vendor \*

United Airlines

Airline Class of Service \*

Business Class

Payment Type \*

Out of Pocket

Transaction Amount \*

695.00

Currency \*

US, Dollar

Personal Expense (do not reimburse)

Missing Receipt Acknowledgment Form Attached

Source of Purchase \*

Travel Leaders

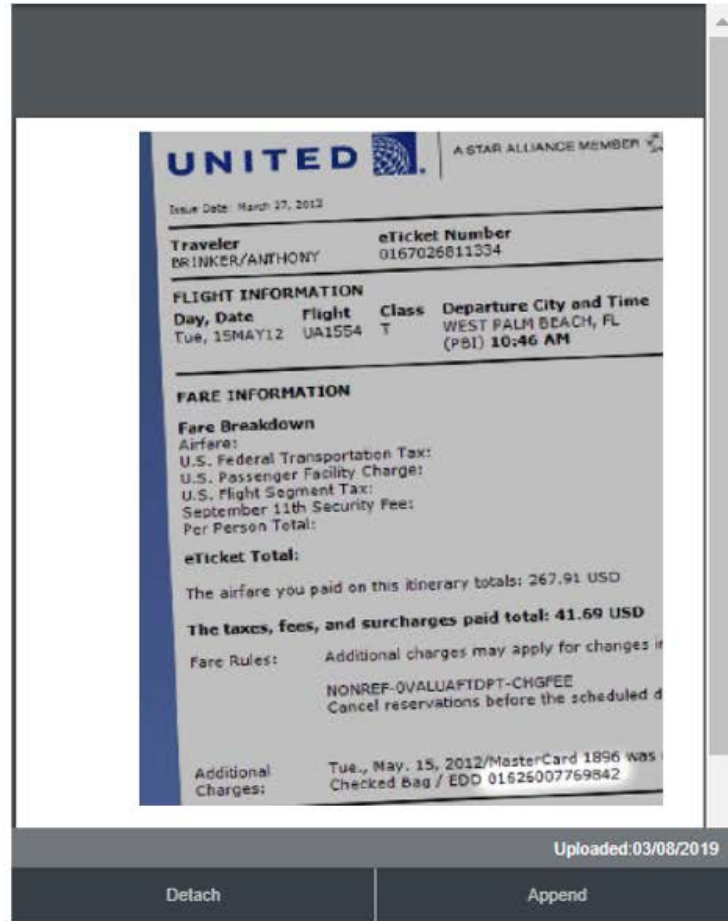
Is this a Vendor Invoice

No

Comment

**Save Expense**

Cancel



Click **Add** then the **Available Expenses** tab to add the taxi expense.

- d. Enter **Expense Type** 53103-US LOCAL TRANSPORTATION for **Yellow Cab** and complete the required fields. Click **Save**.
- e. Attach the receipt and click **Save Expense**.

The screenshot shows the SAP Concur Expense entry interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted), 'Approvals', and 'App Center'. Below this, there are links for 'Manage Expenses' and 'Cash Advances'. The main header displays the expense details: '53103-US LOCAL TRANSPORTATION \$22.50' with a trash icon, the date '05/04/2018', and the vendor 'Yellow Cab'. Action buttons for 'Cancel' and 'Save Expense' are visible.

The 'Details' tab is active, showing the following fields:

- Expense Type \***: 53103-US LOCAL TRANSPORTATION
- Transaction Date \***: 05/04/2018
- Business Purpose \***: Ride to conference
- Vendor Name \***: Yellow Cab
- City \***: Seattle, Washington
- Payment Type \***: Out of Pocket
- Transaction Amount \***: 22.50
- Currency \***: US, Dollar
- Personal Expense (do not reimburse)
- Missing Receipt Acknowledgment Form Attached
- Is this a Vendor Invoice? \***: No
- Comment**: (empty text area)

A receipt viewer is overlaid on the right side, displaying the following receipt information:

The Yellow Cab Company  
2201 Executive Blvd.  
Los Angeles CA 90045

Date: JUL 12, 2018

Depart: Dulles Airport

Arrive: 45155 Research Place

Mileage: 11.00  
Fee: \$ Any  
Paid by: Cash X  
Credit Card

At the bottom of the receipt viewer, there are 'Detach' and 'Append' buttons.



Click **Add** then the **Available Expenses** tab to enter the Personal Car Mileage expense.

- f. Enter **Expense Type** 53103-PERSONAL CAR MILEAGE for personal car trip to and from airport.
- g. Click the **Mileage Calculator** and enter the To and From addresses and select the **Round Trip** option.
- i. Click **Add Mileage to Expense**

**Mileage Calculator**

Avoid Tolls  Avoid Highways

Waypoints

- A 155 Research Pl, Ashburn, VA 20147, L  10.6 MI Personal
- B Dulles International Airport (IAD), 1 Sa  11.0 MI Personal
- C 45155 Research Pl, Ashburn, VA 20147  Personal
- D

Calculate Route

Directions

A 45155 Research Pl, Ashburn, VA 20147, USA

10.6 mi. About 16 mins

1. Head southeast 213 ft
2. Turn left toward Research Pl 59 ft
3. Turn left toward Research Pl 240 ft



TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	21.6 MI

Map


Map data ©2018 Google Terms of Use Report a map error

Add Mileage to Expense Cancel

- j. Attach the receipt if necessary. If under \$35.00, no receipt is required by the university, though some departments may still request their employees to provide this information.
- k. Check that 1) there are no **!** **Exception** alerts which impact your report, and that 2) the **Total Amount** equals the **Total Requested**. If the report has no more exceptions, Concur notifies the user with a **Success!** message.




SAP Concur  Requests Travel **Expense** Approvals App Center Help  Profile


Manage Expenses Cash Advances




 Success! You have cleared all alerts on this report.



Sample Travel Report \$729.49 Delete Report Submit Report

Not Submitted

Report Details  Print/Share  Manage Receipts 

Add Edit Delete Copy Allocate Combine Expenses Move to 

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		JP Morgan Chase Corp Card CBCP	53103-PERSONAL CAR MILEAGE		05/05/2018	\$11.99
<input type="checkbox"/>		JP Morgan Chase Corp Card CBCP	53103-US LOCAL TRANSPORTATION	Yellow Cab Seattle, Washington	05/04/2018	\$22.50
<input type="checkbox"/>		JP Morgan Chase Corp Card CBCP	53101-US AIRFARE EXPENSE	United Airlines Seattle, Washington	05/03/2018	\$695.00
						<b>\$729.49</b>

 SAP Concur 

This report is now complete and you can click the **Submit Report** button. See the FAQ **How to Add or Change Approver in Report** for the approval flow process.