

# SINGLE TRIP EXAMPLE

These templates are meant to illustrate what a typical travel request and expense report look like for a single trip. Step-by-step instructions for creating requests and reports are available in the Concur Handbook.

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# SAMPLE TRAVEL REQUEST

## REQUEST HEADER

CONCUR Requests Travel Expense Approvals Reporting App Center Administration Help Profile

Manage Requests New Request Process Requests Quick Search

Request Cancel Save Print / Email Delete Request Submit Request Status: Not Submitted

Request Name: Purpose:

Request Header Expenses Approval Flow Audit Trail

|                             |                               |  |   |                              |
|-----------------------------|-------------------------------|--|---|------------------------------|
| Request Name                | Request Policy                | Start Date                             | End Date  | Destination                  |
| ABC Conference              | *FSU - Default Request Policy | 05/17/2016                             | 05/21/2016  | Las Vegas                    |
| Purpose                     | Comment                       | <input type="checkbox"/> EIO Funded?   | <input type="checkbox"/> FCTL Funded?                 |                              |
| To attend ABC Conference    |                               | <input type="checkbox"/> Study Abroad? | <input type="checkbox"/> No Expenses will be Incurred |                              |
| FCTL Amount                 |                               | Area of Travel                         |   |                              |
|                             |                               | Out of State (including Canada)        |   |                              |
| Chart                       | Division                      | College/Department                     | Unit  | Index                        |
| (1) Ferris State Big Rapids | (D) Admin and Finance         | (56) Finance Office                    | (563) Disbursement Office                             | (G56300) Disbursement Office |
| Fund                        | Organization                  | Program                                | Employee First Name                                   | Employee Last Name           |
| (10000) BR Gen Fund         | (56300) Disbursement Office   | (662) Fiscal Operations                | Emily   | Zoet                         |

- **Request Policy:** should be "Default Request Policy" for single trips
- **Start and End Dates:** should be dates of travel
- **Purpose:** the business purpose of the trip
- **Area of Travel:** indicates whether in-state, out-of-state, or international; request will automatically route to necessary approvers based on this selection

# Request 433J

[Attachments](#)
[Print / Email](#)
[Delete Request](#)
[Submit Request](#)

Status: Not Submitted  
 Amount: \$1,811.30

Request Name: ABC Conference  
 Purpose: To attend ABC Conference

[Request Header](#)
[Expenses](#)
[Approval Flow](#)
[Audit Trail](#)

[+ New Expense](#)
[Delete](#)
«

| <input type="checkbox"/> | Date       | Expense Type                     | Amount   | Requested |
|--------------------------|------------|----------------------------------|----------|-----------|
| <input type="checkbox"/> | 05/17/2016 | Airfare                          | \$300.00 | \$300.00  |
| <input type="checkbox"/> | 05/17/2016 | Booking Fees                     | \$6.50   | \$6.50    |
| <input type="checkbox"/> | 05/17/2016 | Car Rental                       | \$150.00 | \$150.00  |
| <input type="checkbox"/> | 05/17/2016 | Conference/Registration (Travel) | \$250.00 | \$250.00  |
| <input type="checkbox"/> | 05/17/2016 | Hotel                            | \$800.00 | \$800.00  |
| <input type="checkbox"/> | 05/17/2016 | Shuttle                          | \$25.00  | \$25.00   |
| <input type="checkbox"/> | 05/17/2016 | 01a. Personal Car: Mileage       | \$64.80  | \$64.80   |
| <input type="checkbox"/> | 05/17/2016 | Fixed Meals(Per Diem)            | \$175.00 | \$175.00  |
| <input type="checkbox"/> | 05/17/2016 | Parking                          | \$40.00  | \$40.00   |

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- |                                  |                             |
|----------------------------------|-----------------------------|
| 01. Travel (Lodging)             | 01a. Personal Car: Mileage  |
| Airfare                          | 02. Events                  |
| Airfare Ticket Tax               | Entry / Admissions Fee      |
| Airline Fees                     | Food (Meetings/Events) 7122 |
| Automobile Gasoline & Oil        | 13. Other                   |
| Booking Fees                     | Individual Meals            |
| Bus                              | Fixed Meals(Per Diem)       |
| Business Meal (attendees)        | Transportation              |
| Car Rental                       | University Vehicle          |
| Conference/Registration (Travel) |                             |

**NOTE: EXAMPLE ABOVE SHOWS TYPICAL EXPENSES YOU MAY CONSIDER INCLUDING IN YOUR REQUEST.**

# SAMPLE EXPENSE REPORT – PRE-TRIP EXPENSES

## REPORT HEADER

CONCUR | Requests | Travel | **Expense** | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Expenses | Processor

### Create a New Expense Report

Report Header

|  |   |   |                                   |   |
|--|---|---|-----------------------------------|---|
| Report Name<br>ABC Conference - Part 1       | Report Date<br>06/22/2016                   | Policy<br>US Expense Policy               | Type of Expense<br>Staff          | Area of Travel<br>Out of State (including Canad |
| Business Purpose<br>E.g.-conference expenses | Division<br>(D) Admin and Finance           | College/Department<br>(56) Finance Office | Unit<br>(563) Disbursement Office | Index<br>(G56300) Disbursement Off              |
| Fund<br>(10000) BR Gen Fund                  | Organization<br>(56300) Disbursement Office | Program<br>(662) Fiscal Operations        | Activity                          | <input type="checkbox"/> EIO Funded?            |
| <input type="checkbox"/> FCTL Funded?        | FCTL Amount                                 | <input type="checkbox"/> Study Abroad?    | Comment                           |   |

Requests

| <input type="checkbox"/> | Request Name | Request ID | Cancelled | Request Total | Amount Approved | Amount Remaining |
|--------------------------|--------------|------------|-----------|---------------|-----------------|------------------|
| <input type="checkbox"/> |              |            |           |               |                 |                  |

- **Area of Travel:** indicates whether in-state, out-of-state, or international; request will automatically route to necessary approvers based on this selection
- **Requests:** attach related approved travel request to report header

Manage Expenses Processor

# ABC Conference - Part 1

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

[+ New Expense](#)
[+ Quick Expenses](#)
[Import Expenses](#)
[Details](#)
[Receipts](#)
[Print / Email](#)

## Expenses

| <input type="checkbox"/>  | Date       | Expense Type  | Amount   | Requested |
|---------------------------|------------|---|----------|-----------|
| <i>Adding New Expense</i> |            |   |          |           |
| <input type="checkbox"/>  | 05/17/2016 | <b>Airfare</b><br>Delta Air Lines, Big Rapids, Michigan                         | \$325.00 | \$325.00  |
| <input type="checkbox"/>  | 05/17/2016 | <b>Booking Fees</b><br>Professional Travel, Big Rapids, Michigan                | \$6.50   | \$6.50    |
| <input type="checkbox"/>  | 05/17/2016 | <b>Hotel Deposit</b><br>Venetian, Big Rapids, Michigan                          | \$100.00 | \$100.00  |
| <input type="checkbox"/>  | 05/17/2016 | <b>Conference/Registration (Travel)</b><br>ABC Conference, Big Rapids, Michigan | \$250.00 | \$250.00  |

**New Expense** Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

**Recently Used Expense Types**

|                                  |               |
|----------------------------------|---------------|
| Conference/Registration (Travel) | Hotel Deposit |
| Booking Fees                     | Airfare       |
| Food (Meetings/Events) 7122      |               |

**All Expense Types**

|                      |               |
|----------------------|---------------|
| 01. Travel (Lodging) | 08. Utilities |
|----------------------|---------------|

**NOTE: EXAMPLE ABOVE SHOWS TYPICAL EXPENSES YOU MAY INCUR PRIOR TO A TRIP.**

# SAMPLE EXPENSE REPORT – POST-TRIP EXPENSES

## REPORT HEADER

CONCUR | Requests | Travel | **Expense** | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Expenses | Processor

### Create a New Expense Report

Report Header

|   |   |  |                                   |  |
|---|---|--|-----------------------------------|--|
| Report Name<br>ABC Conference - Part 2                  | Report Date<br>05/24/2016                   | Policy<br>US Expense Policy                              | Type of Expense<br>Staff          | Area of Travel<br>Out of State (including Canad        |
| Business Purpose<br>Post-conference expenses            | Division<br>(D) Admin and Finance           | College/Department<br>(56) Finance Office                | Unit<br>(563) Disbursement Office | Index<br>(G56300) Disbursement Offic                   |
| Fund<br>(10000) BR Gen Fund                             | Organization<br>(56300) Disbursement Office | Program<br>(662) Fiscal Operations                       | Activity                          | <input type="checkbox"/> EIO Funded? <a href="#">?</a> |
| <input type="checkbox"/> FCTL Funded? <a href="#">?</a> | FCTL Amount <a href="#">?</a>               | <input type="checkbox"/> Study Abroad? <a href="#">?</a> | Comment                           |  |

Requests

| <input type="checkbox"/> | Request Name | Request ID | Cancelled | Request Total | Amount Approved | Amount Remaining |
|--------------------------|--------------|------------|-----------|---------------|-----------------|------------------|
|                          |              |            |           |               |                 |                  |

[Add](#) [Remove](#)

- **Area of Travel:** indicates whether in-state, out-of-state, or international; report will automatically route to necessary approvers based on this selection
- **Requests:** attach related approved travel request to report header

Manage Expenses Processor ▾

## ABC Conference - Part 2

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

[+ New Expense](#)
[+ Quick Expenses](#)
[Import Expenses](#)
[Details](#)
[Receipts](#)
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### Expenses

| <input type="checkbox"/>            | Date       | Expense Type  | Amount   | Requested |
|-------------------------------------|------------|---|----------|-----------|
| Adding New Expense                  |            |   |          |           |
| <input type="checkbox"/>            | 05/21/2016 | Airline Fees<br>Delta Air Lines, Grand Rapids, Michigan | \$25.00  | \$25.00   |
| <input type="checkbox"/>            | 05/22/2016 | Car Rental<br>Hertz                                     | \$163.00 | \$163.00  |
| <input type="checkbox"/>            | 05/17/2016 | Fixed Meals(Per Diem)<br>Las Vegas, Nevada              | \$36.75  | \$36.75   |
| <input type="checkbox"/>            | 05/18/2016 | Fixed Meals(Per Diem)<br>Las Vegas, Nevada              | \$49.00  | \$49.00   |
| <input type="checkbox"/>            | 05/19/2016 | Fixed Meals(Per Diem)<br>Las Vegas, Nevada              | \$49.00  | \$49.00   |
| <input type="checkbox"/>            | 05/20/2016 | Fixed Meals(Per Diem)<br>Las Vegas, Nevada              | \$49.00  | \$49.00   |
| <input type="checkbox"/>            | 05/21/2016 | Fixed Meals(Per Diem)<br>Las Vegas, Nevada              | \$36.75  | \$36.75   |
| <input checked="" type="checkbox"/> | 05/22/2016 | Hotel<br>Venetian, Las Vegas, Nevada                    | \$750.00 | \$750.00  |
| <input type="checkbox"/>            | 05/17/2016 | Hotel   | \$165.00 | \$165.00  |
| <input type="checkbox"/>            | 05/18/2016 | Hotel   | \$165.00 | \$165.00  |
| <input type="checkbox"/>            | 05/19/2016 | Hotel   | \$165.00 | \$165.00  |
| <input type="checkbox"/>            | 05/20/2016 | Hotel   | \$165.00 | \$165.00  |
| <input type="checkbox"/>            | 05/17/2016 | Hotel Tax   | \$22.50  | \$22.50   |
| <input type="checkbox"/>            | 05/18/2016 | Hotel Tax   | \$22.50  | \$22.50   |
| <input type="checkbox"/>            | 05/19/2016 | Hotel Tax   | \$22.50  | \$22.50   |
| <input type="checkbox"/>            | 05/20/2016 | Hotel Tax   | \$22.50  | \$22.50   |
| <input type="checkbox"/>            | 05/21/2016 | Parking<br>Grand Rapids, Michigan                       | \$42.00  | \$42.00   |
| <input type="checkbox"/>            | 05/22/2016 | Personal Car Mileage                                    | \$72.90  | \$72.90   |
| <input type="checkbox"/>            | 05/17/2016 | Shuttle<br>Shuttle Express, Las Vegas, Nevada           | \$40.00  | \$40.00   |

New Expense Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

|              |                      |
|--------------|----------------------|
| Airline Fees | Parking              |
| Shuttle      | Personal Car Mileage |
| Hotel        |                      |

All Expense Types

|  |   |
|--|---|
| <p><b>01. Travel (Lodging)</b></p> <ul style="list-style-type: none"> <li>Airfare</li> <li>Airfare Ticket Tax</li> <li>Airline Fees</li> <li>Automobile Gasoline &amp; Oil</li> <li>Booking Fees</li> <li>Bus</li> <li>Business Meal (attendees)</li> <li>Car Rental</li> <li>Conference/Registration (Travel)</li> <li>Ferry</li> <li>Hotel</li> <li>Hotel Deposit</li> <li>Incidentals</li> <li>Limousine</li> <li>Miscellaneous (Travel)</li> <li>Parking</li> <li>Shuttle</li> <li>Subway</li> <li>Taxable Income - Meal-Per Diem</li> </ul> | <p><b>08. Utilities</b></p> <ul style="list-style-type: none"> <li>Cogeneration 7902</li> <li>Electricity 7904</li> <li>Fuel Oil 7910</li> <li>Hazardous Waste 7908</li> <li>Natural Gas 7906</li> <li>Propane 7910</li> <li>Sanitation Pickup 7914</li> <li>Sewer And Water 7912</li> <li>Steam 7911</li> </ul> <p><b>09. Equipment</b></p> <ul style="list-style-type: none"> <li>Capital Equipment and Furniture 7514</li> <li>Capital Lease Pymt Ownership Option 7508</li> <li>Capital Technology Equipment 7570</li> <li>Equipment Under \$5000 7158</li> <li>Leased Equip (No Ownership Option) 7314</li> <li>Subsequent Years Lease Payments 7510</li> <li>Technology Equipment under \$5000 7159</li> <li>Telephone Equipment 7328</li> </ul> <p><b>10. Maintenance and Repair</b></p> |
|--|---|

**NOTE: EXAMPLE ABOVE SHOWS TYPICAL EXPENSES YOU MAY INCUR DURING OR AFTER A TRIP.**

- **Receipts:** attach receipts to expenses that require them
- **Hotels:** must itemize by daily rates as shown above
- **Fixed Meals:** added by creating an itinerary (go to Details menu)