

## Travel, Entertainment & Business Expense Requests & Resources

### Quick overview of Concur

[Concur Overview](#) Video (3:06 min)

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### Prior to Travel/Event: Submit a Request (Pre-Authorization for travel or entertainment)

- [How to Create and Submit a Request](#) Video (1:56 min)
  - Refer to the Understanding the Header Row video [Understanding a Concur Header](#) Video (1:19 min). Here are examples of fields you will need to fill out. Same as the paper form.
    - Event/Trip Name (e.g., conference, training, fieldwork)
    - Report Type (Dropdown options)
    - Request/Trip purpose & Business purpose
    - Request/Trip start and Request/Trip end dates
    - Destination City/Country
    - Host Name (For entertainment or employee morale events)
  - **Expected Expense Screen:** We recommend adding in anticipated expenses such as lodging, meals, or registration. This step will save you time when you return from your trip.
- [How to Request a Cash Advance](#) Video (0.33 min)
- [How to Apply a Cash Advance](#) Video (0.54 min)
  - It's recommended for travelers to apply for a Travel & Entertainment Card.

### Returning from Travel: Create an Expense Report (Travel, Entertainment, or Business)

[How to Create an Expense Report from an Approved Request](#) Video (1:33 min)

- FAU (Full Accounting Unit)- This is the account you will spend money from (e.g., start-up, retention, grant). Make sure to enter the correct four-letter department code.
- Selecting the correct Funding Sub.
  - For Travel- Select sub-5
  - For most other reimbursements- Select sub-3
- [How to Create an Expense Report on Concur Mobile](#) (No video)
- [How to Itemize an Expense on Concur Mobile](#) (No video)
- [Uploading Receipts](#) Video (1:15 min)
- [Uploading Receipts on Concur Mobile](#) Video (1:19 min)
  - Pro Tip: Upload your receipts into Concur before starting your expense report.
  - Follow your department's protocol on submitting meal receipts.

### Business Expense: (e.g., memberships, miscellaneous expenses)

- [How to create a Business Expense Report](#)
  - The Business Expense cannot create as a pre-authorization request.
  - Business Expense Reimbursements should always be a last resort, and your Department should direct everyone to use **Gateway** or use your Department **Flexcard** for these kinds of purchases.

### Delegates (Please follow your internal department protocol on using delegates)

- [Delegate Overview](#) Video (1.34 min)
- [How to Add a Delegate](#) (No video)
  - If you do not see the employee you want to add as a delegate, please contact your department manager.