All CSU-related travel for faculty and staff must have an **approved Request** before an expense report can be created.

Note: Per Cal Poly Travel Guidelines, *Travel Expense Report/Claim must be submitted within 30 days of the end of a trip.* Please be aware Approved Requests will automatically close 60 days after the travel end date.

Creating a New Expense Report
To create a report:

1. Either (3 ways):
   - Click **Request** on the header toolbar, and then select **Expense** under the Action column of the approved Request.
   - or -
   - On the home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.
   - or -

```
[Image]
SAP Concurs: Requests
Active Requests (4)

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Request ID</th>
<th>Status</th>
<th>Request Dates</th>
<th>Date Submitted</th>
<th>Total</th>
<th>Approved</th>
<th>Remaining</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>receipt test</td>
<td>394K</td>
<td>Not Submitted</td>
<td>06/26/2018</td>
<td>06/27/2018</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>Expense</td>
</tr>
<tr>
<td>receipt testing domestic</td>
<td>33A</td>
<td>Approved</td>
<td>06/24/2018</td>
<td>06/22/2018</td>
<td>$1,300.00</td>
<td>$1,300.00</td>
<td>$1,300.00</td>
<td>Expense</td>
</tr>
<tr>
<td>receipt test international</td>
<td>364</td>
<td>Approve</td>
<td>06/18/2018</td>
<td>06/23/2018</td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>Expense</td>
</tr>
<tr>
<td>ABM truck</td>
<td>394H</td>
<td>Approved</td>
<td>06/11/2018</td>
<td>06/22/2018</td>
<td>$800.00</td>
<td>$800.00</td>
<td>$800.00</td>
<td>Expense</td>
</tr>
</tbody>
</table>
```

```
[Image]
SAP Concurs: Expense
```

- or -

```
[Image]
SAP Concurs: Expense
```

- or -

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[Image]
SAP Concurs: Expense
```

- or -

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[Image]
SAP Concurs: Expense
```

- or -

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[Image]
SAP Concurs: Expense
```
• Click Expense on the header toolbar, and then select the Create New Report tile.

2. If you don't create the expense report from the approved Request then you will need to link the approved Request to the Expense Report by clicking the Add button. A list of approved Requests will pop up, then select the one you want to link to this Expense Report.
Note: A linked approved request will fill in most of the required fields. Complete the remainder of the required fields (marked with red bars) to proceed.

3. Two additional fields are in the Expense header (-vs- Request header) which need to be answered.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is any portion of this trip going to be reimbursed by the CO/CPO?</td>
<td>Chancellor's office is going to reimburse for any part of the trip expenses.</td>
</tr>
</tbody>
</table>

4. When all header information is complete, you can begin adding either out-of-pocket expenses and/or Concur Travel/Ghost card transactions to your Expense Report by clicking Next.

5. You can now start adding expenses including out of pocket, Concur Travel card or ghost card transactions, or other; see proper documents for more details.

For International travel please see Creating an Expense Report: International document since a Travel Allowance Itinerary is required.