

Concur Travel and Expense Management

Creating a Goods and Services Expense Report



+
Start a
Request

+
Start a
Report

+
Upload
Receipts

00
Authorization
Requests

07
Available
Expenses

00
Open
Reports

TASKS

00 Open Requests

User currently has no active requests.



07 Available Expenses →

01/01 KEEN COMP. GAS-CORPOR
\$30.75

12/21 KEEN COMP. GAS-CORPOR
\$23.50

12/21 KEEN COMP. GAS-CORPOR
\$258.83

12/13 KEEN COMP. GAS-CORPOR
\$77.70

08/18 BEST BUY MHT 00014803
\$64.97

00 Open Reports →



Service Status (US2)

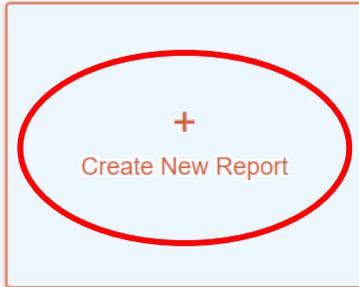
- To begin, log into udel.edu/concur using your UD credentials
- Click on the **Expense** tab at the top of the Concur home page



Manage Expenses View Transactions

Manage Expenses

REPORT LIBRARY View: Active Reports ?



Displayed reports: 1, Total: 1

AVAILABLE EXPENSES View: All Expenses

<input type="button" value="Delete"/> <input type="button" value="Combine Expenses"/> <input type="button" value="Move to"/>						
<input type="checkbox"/>	Receipt	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ☰	Amount ↑↓
<input type="checkbox"/>		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75
<input type="checkbox"/>		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50
<input type="checkbox"/>		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83
<input type="checkbox"/>		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70
<input type="checkbox"/>		UD Credit Card	Unde	BEST BUY MHT 00014803	08/18/2022	\$64.97
<input type="checkbox"/>		UD Credit Card	Lodgi		08/12/2022	\$-1,708.72

Select Create New Report



Create New Report

Create From an Approved Request

Expense Report Type *

*UD-Goods and Services

* Required field

Report Name *

December Expenses

User Type

02. Staff/Grad Student

Employee Department

Business Justification *

Gas cylinder rentals for labs

Report Total

Speedtype *

Search by Code

Work Order #

Search by Code

Project ID

Search by Code

UD User Field

Search by Code

Comments To/From Approvers

Travel Allowance

Will this trip include per diem? If you are creating a Goods and Services Report, select 'No'.

- Yes, I require Travel Allowance
- No, I do not require Travel Allowance

- Select **Goods and Services** as the Expense Report Type
- Complete the required fields marked with a *
- Click **Save**

Cancel

Create Report

Manage Expenses

View Transactions

December Expenses \$0.00

Not Submitted | Report Number: C8F6WG

Submit Report

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

View: Standard

No Expenses

Add expenses to this report to submit for reimbursement.



Service Status (US2)
Contact Support
Cookie Preferences



Click **Add Expense**

SAP Concur

Support | Help

Manage Expenses View Trans

December Expense Report

Not Submitted | Report Number

Report Details Print/Share

Add Expense Edit

Delete Report Submit Report

View: Standard

Add Expense

7 Available Expenses [+ Create New Expense](#)

<input type="checkbox"/>	Payment T... ↑↓	Expense T... ↑↓	Vendor De... ↑↓	Date	Amount ↑↓
<input checked="" type="checkbox"/>	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75
<input checked="" type="checkbox"/>	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50
<input checked="" type="checkbox"/>	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83
<input checked="" type="checkbox"/>	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70

BEST BUY MHT

Close [Add To Report](#)

SAP

Service Status (US2)
Contact Support
Cookie Preferences

SAP Concur

- Select all expenses you want on this report
- Click **Add to Report**



Manage Expenses

View Transactions

Alerts: 11

December Expenses \$390.78

Delete Report

Copy Report

Submit Report

Not Submitted | Report Number: C8F6WG

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

View: Standard

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83
<input checked="" type="checkbox"/>	!		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70
							\$390.78



Service Status (US2)

Contact Support

Cookie Preferences

To make changes to multiple expenses at once:

- Select the expenses you want to update
- Click **Edit**

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SAP Concur  Requests Expense Support | Help

Manage Expenses View Transactions

Alerts: 11

December Expenses \$390.78

Not Submitted | Report Number: C8F6WG

Report Details Print/Share Manage Receipts

Add Expense Edit Delete

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓
<input checked="" type="checkbox"/>	!	↑	UD Credit Card
<input checked="" type="checkbox"/>	!	↑	UD Credit Card
<input checked="" type="checkbox"/>	!	↑	UD Credit Card
<input checked="" type="checkbox"/>	!	↑	UD Credit Card

Edit Expenses ✕

Expenses (✓ 4)

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Expense Type
Laboratory ▼

Business Justification

Comment

Cancel **Next**

Delete Report Copy Report Submit Report

View: Standard

Date	Requested
01/01/2023	\$30.75
12/21/2022	\$258.83
12/21/2022	\$23.50
12/13/2022	\$77.70
\$390.78	

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Service Status (US2)
Contact Support
Cookie Preferences

- Update one or more of the fields as needed
- Click **Next**

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Manage Expenses View Transactions

Alerts: 11

December Expenses \$390.78

Not Submitted | Report Number: C8F6WG

Report Details Print/Share Manage Receipts

Add Expense Edit Delete

Delete Report Copy Report Submit Report

View: Standard

Confirm ✕

Expenses (✓ 4)

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Expense Type

Cancel **Save**

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83
<input checked="" type="checkbox"/>	!		UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Undefined	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70
							\$390.78



SAP Concur  Requests Expense Support | Help

Manage Expenses View Transactions

Alerts: 7

December Expenses \$390.78

Not Submitted | Report Number: C8F6WG

Delete Report Copy Report Submit Report

Report Details Print/Share Manage Receipts Travel Allowances

Add Expense Edit Delete Copy **Allocate** Combine Expenses Move to View: Standard

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83
<input checked="" type="checkbox"/>	!		UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50
<input checked="" type="checkbox"/>	!	↑	UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70
							\$390.78

To allocate expenses to different Speedtypes/Purpose Codes than the one on your Report Header:

- Select the expenses you want to allocate
- Click **Allocate**



Allocate

Expenses: 4 | \$390.78



Percent

Amount

Amount
\$390.78Allocated \$390.78
100%Remaining \$0.00
0%

Default Allocation

Code

Default

Percent %

100

Add

Edit

Remove

Save as Favorite

No Allocations

These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently.

Cancel

Save

- Select allocation calculation (*Percent* or *Amount*)
- Click **Add**



Add Allocation [X]

+ New Allocation **★ Favorite Allocations**

Speedtype * * Required field
▼ (FURC110000) PROCUREMENT SERVICES

Project ID
▼ Search by Code

UD User Field
▼ Search by Code

Work Order #
▼ Search by Code

Cancel **Save**

- Select the Speedtype
- Click **Save**



Allocate



Expenses: 4 | \$390.78 | [View Allocation Group](#)

Percent
 Amount

Amount
\$390.78

Allocated 100%
\$390.78

Remaining 0%
\$0.00

Default Allocation

Code
Default

Amount USD
\$0.00

<input type="checkbox"/>	Speedtype ↑↓	Project ID ↑↓	UD User Field ↑↓	Work Order # ↑↓	Code ☰	Amount USD
<input type="checkbox"/>	1743 LLC PROCARD CLEARING				ABCD112112	<input type="text" value="195.39"/>
<input type="checkbox"/>	PROCUREMENT SERVICES				PURC110000	<input type="text" value="195.39"/>

• Enter the percentage or amount you would like to allocate
 (If you would like to use this allocation split in the future, click **Save as Favorite**)
 • Click **Save**



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Manage Expenses View Transactions

 Alerts: 7

December Expenses \$390.78 Delete Report Copy Report Submit Report

Not Submitted | Report Number: C8F6WG

Report Details Print/Share Manage Receipts Travel Allowance

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ☰	Requested ↑↓
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70 Allocated
							\$390.78

Receipts are *required* for all expenses \$25 or more

- To add a receipt, click on the receipt icon (present only on expenses \$25 or more) or
- Select the expense to open the expense details



Manage Expenses View Transactions

Alerts: 2

Laboratory \$77.70

Cancel

Delete Expense

Save Expense

12/13/2022 | KEEN COMP. GAS-CORPOR | Corporate Card

Details

Itemizations

Hide Receipt

Allocate

* Required field

Expense Type *

Laboratory

Transaction Date

12/13/2022

Business Justification *

Enter Vendor Name

KEEN COMP. GAS-CORPOR

City of Purchase

Payment Type

UD Credit Card

Amount

77.70

Currency

US, Dollar

Comment

Add Receipt

Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Save Expense

Cancel

Click Add Receipt (or Drag & Drop a file from your computer)

Alerts: 2

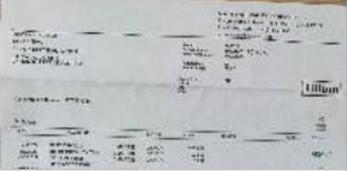
Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts **Receipts in Report**

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt
Drag and drop files to upload a new receipt.

Gmail - Your ride with Frederick on ... Uploaded: 01/22/2023 8:37 PM	Hotel_1.png Uploaded: 11/10/2022 11:48 PM
 Attach View	 Attach View
Best buy.png Uploaded: 10/20/2022 3:40 AM	University of Delaware Mail - Your N... Uploaded: 10/20/2022 3:32 AM
	

Close

Save Expense

Hide Receipt

new receipt.
f, .tif or .tiff.

- Select **Available Receipts** to see receipts that have been added to your profile or search and upload documents saved to your computer
- Select **Receipts in Report** to reuse a receipt in your current report
- Click **Attach**



Laboratory \$77.70

Cancel

Delete Expense

Save Expense

12/13/2022 | KEEN COMP. GAS-CORPOR | Corporate Card

Details

Itemizations

Hide Receipt

Allocate

* Required field

Expense Type *

Laboratory

Transaction Date

12/13/2022

Business Justification *

Enter Vendor Name

KEEN COMP. GAS-CORPOR

City of Purchase

Payment Type

UD Credit Card

Amount

77.70

Currency

US, Dollar

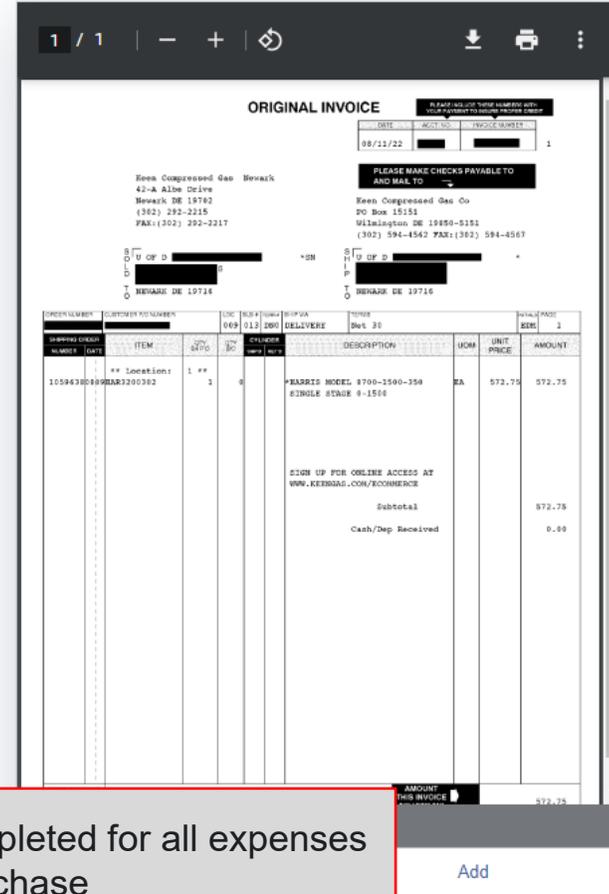
Comment

Empty text area for comment.

Save Expense

The Business Justification field **must** be completed for all expenses

- This should explain the *Why?* of your purchase



Manage Expenses

View Transactions

December Expenses \$390.78

Delete Report

Copy Report

Submit Report

Not Submitted | Report Number: C8F6WG

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

View: Standard

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	01/01/2023	\$30.75 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$258.83 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/21/2022	\$23.50 Allocated
<input type="checkbox"/>			UD Credit Card	Laboratory	KEEN COMP. GAS-CORPOR	12/13/2022	\$77.70 Allocated
							\$390.78



Service Status (US2)

Contact Support

Cookie Preferences

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Once everything is complete, click **Submit Report**

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Resources

[Procurement Services](#)
procurement@udel.edu

