



Concur- How to Download Expense Documentation for Third Parties

DATE OF LAST UPDATE

February 11, 2020

LAST UPDATED BY

Steve Bagley

STEP	ACTIVITY
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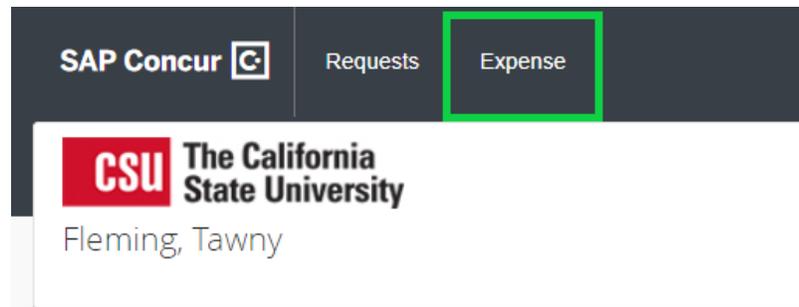
If your Concur trip is being reimbursed by a third party or outside organization, you may need to provide documentation of costs and receipts to verify your expenditures. This guide will show you how to use Concur to download receipts and expense report summaries that can be used after traveling.

- Part 1** [Finding your Expense Report](#)
- Part 2** [Downloading Receipts](#)
- Part 3** [Downloading your Expense Report Summary](#)

Part 1

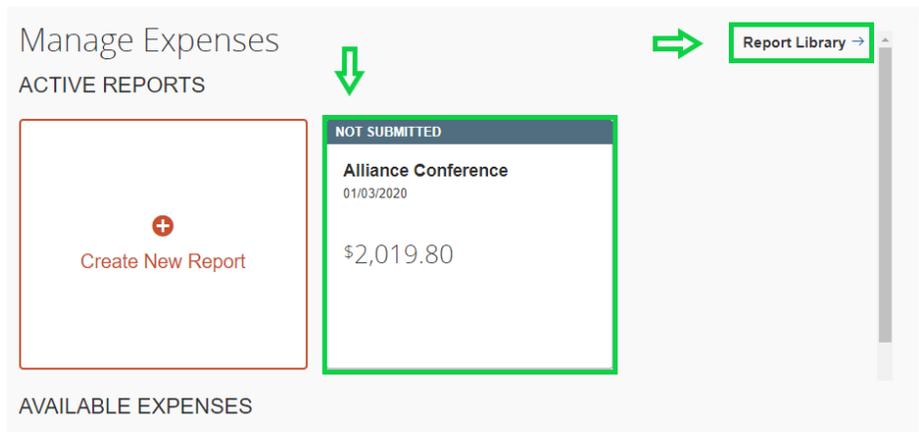
Finding your Expense Report

Open Concur and navigate to the **“Expense”** button in the top toolbar.



Open the **Expense Report** from your recent trip.

If your expense report is not under **“Active Reports,”** select **“Report Library”** in the upper right portion of the screen.



Within “**Report Library**,” you will see a list of past expense reports (as shown on the right).

Select the report you need.

Manage Expenses View Transactions

← Manage Expenses
Reports for last 90 Days

View Create & Edit Import Expenses

<input type="checkbox"/>	Report Name	Report ID	Comments	Status
<input type="checkbox"/>	CPOA In Person Meeting	DC00956F97934764B...		Approved
	⚠ This report has one or more entry level exceptions.			
<input type="checkbox"/>	P2P In-Person Planning Meeting	1B4A10B73DFC43C2...		Approved

Part 2

Finding and Downloading Receipts

Open the **Expense Report**.

Inside, you’ll notice two drop down links at the top of the page: “**Receipts**” and “**Print/Email**.”

Proceed to the “**Receipts**” link first.

Manage Expenses View Transactions

P2P In-Person Planning Meeting

Summary Details Receipts Print / Email

Expenses View

Date	Expense Type	Amount	Approved
12/18/2019	Hotel/Lodging Hilton, Long Beach, California	\$439.81	\$439.81
12/18/2019	Dinner - Domestic LAX AIRP ENGINE CO 28, Los Angel	\$23.70	\$23.70
12/18/2019	Parking/Tolls RPS EUREKA, McKinleyville, Califorr	\$36.00	\$36.00
12/18/2019	Ground Transportation Long Beach, California	\$37.20	\$37.20
12/17/2019	Dinner - Domestic LONG BEACH HILTON, Long Beach,	\$51.00	\$51.00
12/16/2019	Ground Transportation Uber Technologies, Inc, San Francisc	\$11.45	\$11.45
12/16/2019	Breakfast - Domestic HILTON LONG BEACH, Long Beach,	\$2.21	\$2.21

Summary Report Summary Report Totals Amount

Requests (1)
> Request Name
> P2P In-Person Planning M

Select **“Receipts.”**

Choose **“View Receipts in new window”** from the drop down menu.

P2P In-Person Planning Meeting

Summary Details **Receipts** Print / Email

Expenses 

Date	Expense	Approved
12/18/2019	Hotel/L Hilton, L	\$439.81
12/18/2019	Dinner LAX AIR	\$23.70
12/18/2019	Parking/Tolls RPS EUREKA McKinleville, Califor	\$36.00

Receipts Required
View Receipts in new window
View Receipts in current window
Attach Receipt Images
View Available Receipts

View << Summary Report S Report Tot

Request

This will open a single PDF that includes all uploaded receipts from your trip.

Scroll through the document to make sure all the receipts are there.

Save or print the PDF.

1B4A10B73DFC43C2AF41.pdf - Adobe Acrobat Pro DC

File Edit View Window Help

Home Tools 1B4A10B73DFC43... x

3 / 4 50%

Total: \$36.76

Uber

Uber Technologies, Inc
1455 Market Street
San Francisco CA US 91403

Visa - 5456
12/16/2019 3:31 AM
Receipt: 0AE58BD

Pick-up 4:21 PM
401 Shoreline Village Dr, Long Beach, CA 90802, US
Los Angeles, US

Drop-off 4:36 PM
6312 E Pacific Coast Hwy, Long Beach, CA 90803, US
Los Angeles, US

Car
Uber Ground Transport

Duration
00:15:28

Distance
5.6 mi

Map



Part 3

Finding and Downloading the Expense Report Summary

Once you've saved the PDF with your receipts, select the **"Print/Email"** button.

Choose **"Detailed Report with Data Summary"** from the dropdown menu.

P2P In-Person Planning Meeting

Summary Details Receipts **Print / Email**

Expenses

Date	Expense Type	Amount	Approved
12/18/2019	Hotel/Lodging Hilton, Long Beach, California	\$439.81	\$439.81
12/18/2019	Dinner - Domestic LAX AIRP ENGINE CO 28, Los Angel	\$23.70	\$23.70
12/18/2019	Parking/Tolls RPS EUREKA, McKinleyville, Califorr	\$36.00	\$36.00
12/18/2019	Ground Transportation Long Beach, California	\$37.20	\$37.20

Summary Report Summary Report Totals

Requests (1)
Request Name
P2P In-Person Planning Meeting

This will open a downloadable **Expense Report** of your trip.

At the top, you'll have the option to download the document as a **PDF**, send it as an **email**, or **print** it.

https://www.concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_C...
concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&p...

Show Expenses Show Itemizations PDF Email Print Close

Expense Report
Report/Trip Name : P2P In-Person Planning Meeting
Authorization Request
Request ID : 3VN6
Travel Start Date : 12/15/2019
Travel End Date : 12/18/2019
*Personal Dates of Travel : NA

User Name : Fleming, Tawny
Email Address : tb36@humboldt.edu

Report Header
Policy : *CSU-Expense Policy
Report Key : 15217
Report Id : 1B4A10B73DFC43C2AF41

Scroll through the downloadable **Expense Report**.

Here, you'll find a list of each transaction, including dates, expense types, fund allocations, and amounts.

https://www.concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_C...

concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&p...

Airfare					
Transaction Date	Expense Type	Vendor	City of Purchase	Payment Type	Amount
11/21/2019	Airfare	United	Arcata	*Ghost Card-USBank	\$442.20
Account Code : 606001					
Allocations : 100.00% (\$442.20) HM-HMCMP-HM500-D30020-HM-HM-HM					
Airline Fees					
Transaction Date	Expense Type	Vendor	City of Purchase	Payment Type	Amount
11/21/2019	Airline Fees	AGENT FEE 8900776675926		*Ghost Card-USBank	\$5.00
Account Code : 606001					
Allocations : 100.00% (\$5.00) HM-HMCMP-HM500-D30020-HM-HM-HM					
Breakfast - Domestic					
Transaction Date	Expense Type	Vendor	City of Purchase	Payment Type	Amount
12/16/2019	Breakfast - Domestic	HILTON LONG BEACH	Long Beach	*CSU-USBank-CBCP	\$2.21
Account Code : 606001					
Allocations : 100.00% (\$2.21) HM-HMCMP-HM500-D30020-HM-HM-HM					
Dinner - Domestic					
Transaction Date	Expense Type	Vendor	City of Purchase	Payment Type	Amount
12/18/2019	Dinner - Domestic	LAX AIRP ENGINE CO 28	Los Angeles	*CSU-USBank-CBCP	\$23.70

If you continue scrolling down, you'll find the **Expense Report Summary**, which will show a brief run-down of total expenses.

Once you've reviewed this information, you're ready to download this report as a PDF, send it as an email, or print a copy.

You're now ready to provide these documents to the third party who will be reimbursing your travel.

https://www.concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_C...

concursolutions.com/Expense/Client/print_cpr.asp?type=1037&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&p...

Report Total :	\$1,160.86
Personal Expenses :	\$0.00
Total Amount Claimed :	\$1,160.86
Amount Not Approved :	\$0.00
Amount Approved :	\$1,160.86
Company Disbursements	
Amount Due User :	\$47.36
Amount Due University Card :	\$1,113.50
Amount University Paid :	\$0.00
Cash Advance Utilized Amount :	\$0.00
Total Paid By University :	\$1,160.86
Employee Disbursements	
Amount Due University :	\$0.00
Total Paid By User :	\$0.00