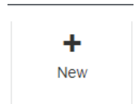
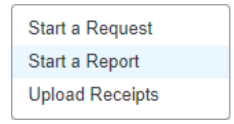
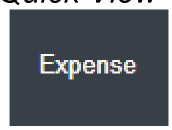
Concur Expense Report - Quick Reference

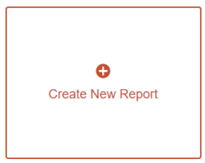
Procedure: Use this quick reference to create an expense report.

- From the Concur dashboard, hover over 

New and select 

Start a Report. The **New** button can be found on the *Quick View Task Bar*.

  NOTE: A report can also be created by clicking 

Expense and clicking 

Create New Report.

- Complete the required fields and any additional fields applicable to the trip on the Report Header. You should enter as much information as possible. Be sure to select the correct radio button under the "Claim Travel Allowance" section. Your selection here will determine if you are prompted to create an itinerary before adding expenses to your report.

  NOTE: If you have chosen to create an expense report for an approved trip request, some information from the *Request Header* will display in the *Expense Header*.

- If you select "Yes, I want to claim Travel Allowance," click 

Next to create a new itinerary or select an available itinerary. Available itineraries can be selected from 

Available Itineraries at the top of your screen.
- If "No, I do not want to claim Travel Allowance" is selected, click 

Create Report.

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- Click 

Add Expense to select “Available Expenses” or click **Create New Expense**.

  NOTE: Once an expense type has been selected, you will be prompted to add additional information about the expense, and in some cases, itemize your expenses.

- Confirm that Alerts have been addressed prior to submitting your Report.
- Click 

Submit Report. When **Submit Report** is clicked**,** you will receive a *User Electronic Agreement* that requires you to click 

Accept & Continue. If errors are found, a pop-up window will display notifying you to correct the errors. Detailed error messages can be found on the *Manage Expenses* page.
- If no alerts need to be addressed, the **Report Totals** pop-up window will display. Here, you can review expenses and allocations for the expense report. If the report needs no further changes, click 

Submit Report.

  NOTE: The traveler must submit their own travel expense. A delegate can enter expenses, but they cannot submit an expense report into workflow.

- You will receive a **Report Status** pop-up notifying you that the trip has been submitted.