

Creating a New Expense Report

You can access your expense reports from two places: the “Concur” tab and the “Expense” tab. Follow the steps below to start a new report.

1. Go to the Expense tab and click “Create New Report.”

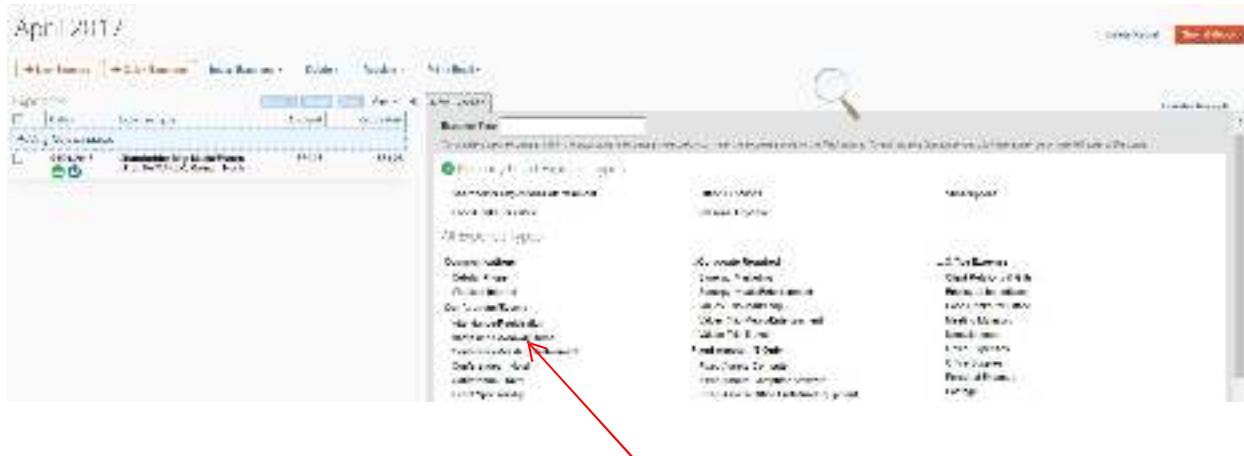


2. Enter information into the required fields (fields with a red bar). You can include additional information if you choose. Click “Next” on the bottom right of the page.

A screenshot of the 'Create a New Expense Report' form in the Concur application. The form is titled 'Create a New Expense Report' and has a 'Report Header' section. It contains several input fields: 'Report Name', 'Report Date' (with a calendar icon), 'Reporting Period', 'Office Location' (with a dropdown menu), 'Report Type' (with a dropdown menu), and 'Comments'. The 'Report Date' and 'Report Type' fields have red bars at the bottom, indicating they are required. A red arrow points to the 'Next' button at the bottom right of the form.

3. If you are entering out of pocket expenses, select the appropriate expense type for the expense you wish to be reimbursed.

***Use the "Conferences/Events" expense types for your conference related expenses ***



4. Fill in the required information (shown with a red bar on the left of the field) and include any additional information you wish.

** Remember to include attendees for all meals and entertainment expenses and to attach receipts. (either at the line item or at the report level) for all expenses \$75 or more before submitting.

The screenshot shows the 'Expense Entry' form with various fields for entering expense details. The form includes sections for 'Expense Type', 'Amount', 'Date', 'Location', and 'Attendees'. A red bar highlights the 'Attendees' field, indicating it is a required field. The form also includes a 'Save' button and a 'Cancel' button.

5. Click "Save."

6. Repeat Steps 3 – 4 for all your Out-of-Pocket expenses.

7. When all your expenses have been added and your report is complete, click “Submit Report.”

If you are missing any required receipts or have attached the receipts at the report level (not to each line item), you will receive a reminder to attach receipts.