Travel and Expense Reimbursement
Completing the Expense Report Header

- Log in to Concur

Create a New Expense Report
On the Concur home page, there are two ways to start a new expense report:

- Click New in the Quick Task Bar, then click Start a Report.
- Click Expense in the top menu bar, then click Create New Report.

Complete the Expense Report Header
The report header is the title page of your expense report. Complete all required fields marked in red.

- **Report Name** — Enter a brief identifier for the report.
- **Report Type** — Choose Non-Travel, Travel or if UBF, you can create one report for both.
- **Funding Account Source** — Choose the correct funding source. This can be changed by cost approver.
- **Report Purpose** — Choose the purpose of the report.
- **Business Purpose** — Enter a description about the report, such as the conference name.
- **UB Affiliation** — This is populated from your HR record. You can choose if you are adding a guest.
- **Start and End Dates** — For travel, enter the dates of your trip. For non-travel, enter the date the expense was incurred.
- **Restricted Travel** — Indicate if you traveled to a travel warning area or not.
- **Approver, Funding Source, Entity and Account** — Complete if you know, or leave these fields blank.
- **Comment** — Enter additional information about the business purpose, or notes about the expense report.
- **Starting and Destination Address/State/Zip** — If non-travel, enter your work address. Enter addresses in the following format:
  - 200 Crofts Hall, Buffalo, NY 14260
- **Start and End Time** — Enter the time using the 12 hour clock format. Example: 8:00 AM
- **Requests** — If this report is for a travel reimbursement and you submitted a prior travel request, it will appear here. Click on your trip and it will populate information on the expense report.
- Click Next.

For Concur Support, email ubs-travel-expense-support@buffalo.edu