Create a New Expense Report
Create a new expense report to submit your business travel or non-travel expenses for reimbursement.

1. Create a New Expense Report
   - Log in to Concur.
   - Before starting the expense report, upload all receipt and supporting documentation images to the system.
     - For more information, refer to the tip sheet Attach Receipts and Supporting Documentation
   - On the home page, there are two ways to start a new expense report (Figure 1):
     1. In the top menu bar, click Expense, then click Create New Report.
     2. In the Quick Task bar click New, then click Start a Report.

![Figure 1]

2. Complete the Expense Report Header
   - On the report header, complete the required fields in red.
     - For more information, refer to the tip sheet Complete the Expense Report Header.
   - When finished, click Next.
   - In the pop-up window asking Is this a travel reimbursement? (Figure 2):
     - Click No for non-travel reimbursements.
     - Click Yes for travel or mileage reimbursements.

![Figure 2]

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
3. For Travel Reimbursements, Create New Itinerary

If the report is a travel reimbursement, on the *Create New Itinerary* screen complete the required fields in red (Figure 3):

- **Itinerary Name** — this is the same as the *Report Name*, but you can change it for your itinerary.
- **Selection** — choose *Per Diem* or *Actuals* depending on the meals you’re submitting for reimbursement.
- **New Itinerary Stop** section — enter your travel itinerary.
  - First, enter the departing leg of your trip.
    - Enter the *Departure City*, *Date* and *Time*, and the *Arrival City*, *Date* and *Time* on the same day. Click *Save*.
  - Next, enter the returning leg of your trip.
    - Enter the *Departure City*, *Date* and *Time*, and the *Arrival City*, *Date* and *Time* on the same day. Click *Save*.
  - Repeat as needed to record all legs of your trip.
  - When finished, click *Next*.

*Figure 3*

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On the *Available Itineraries* screen, review the itinerary you created, then click *Next* (Figure 4).

![Figure 4](image)

On the *Expenses and Adjustments* screen, if you chose *Per Diem* as the meal selection, review the meals you wish to submit for reimbursement (Figure 5).

- Click the checkboxes to exclude meals from reimbursement following the 7:00 a.m. to 7:00 p.m. travel guideline, and to exclude meals that were provided.
- The *Allowance* will recalculate based on the meals you excluded.
- When finished, click *Create Expenses*.
- If you chose *Per Diem* as the meal selection, the meals you claimed will appear on your report as *Daily Meal Allowances*.

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4. Add Expenses to Report
   • For both travel and non-travel reimbursements, add your expenses to the report.
     o Click New Expense. Search and select the appropriate expense type (Figure 6).
For each expense, complete the required fields in red and attach the required receipts. Also be sure to attach supporting documentation.

After entering all expenses, view any exceptions that indicate errors on the report and correct them.

When finished, at the top of the report click Submit Report.