

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*.

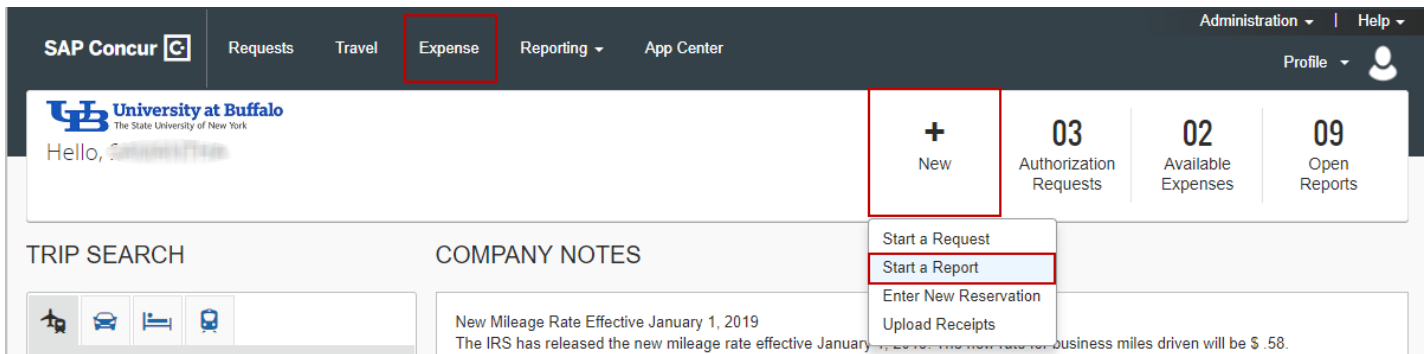


Figure 1

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.

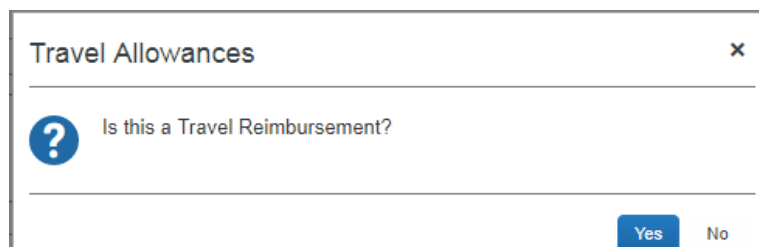


Figure 2

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):

Travel Allowances For Report: Concur Conference ☐ ×

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Selection:

Add Stop **Delete Rows** **Import Itinerary**

	Departure City	Arrival City	Arrival Rate Location
☐			

No Itinerary Rows Found

New Itinerary Stop

Departure City:

Date: Time:

Arrival City:

Date: Time:

Save

Go to Single Day Itineraries
 Next >>
 Cancel

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*.

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

Travel Allowances For Report: Concur Conference



1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Concur Conference				
Buffalo, New York	02/25/2019 08:00 AM	Orlando, Florida	02/25/2019 12:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	02/27/2019 01:00 PM	Buffalo, New York	02/27/2019 05:00 PM	ERIE COUNTY, US-NY, US

Available Itineraries

Current Itineraries [v] Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous Next >>

Figure 4

- 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*.

Travel Allowances For Report: Concur Conference



1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location ▲	Exclude Breakfast	Exclude Dinner	Allowance
<input type="checkbox"/>	02/25/2019 Orlando, Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	→ \$53.00
<input type="checkbox"/>	02/26/2019 Orlando, Florida	<input type="checkbox"/>	<input type="checkbox"/>	\$66.00
<input type="checkbox"/>	02/27/2019 Orlando, Florida	<input type="checkbox"/>	<input checked="" type="checkbox"/>	→ \$13.00

Figure 5

4. Add Expenses to Report

- For both travel and non-travel reimbursements, add your expenses to the report.
 - Click *New Expense*. Search and select the appropriate expense type (Figure 6).

SAP Concur | Requests | Travel | **Expense** | Reporting | App Center | Administration | Help | Profile |

Manage Expenses | Process Reports

Concur Conference

Delete Report | **Submit Report**

+ New Expense | + Quick Expenses | Import Expenses | Details | Receipts | Print / Email

Expenses	Date	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	02/27/2019	Daily Meal Allowance Orlando, Florida	\$13.00	\$13.00
<input type="checkbox"/>	02/26/2019	Daily Meal Allowance Orlando, Florida	\$66.00	\$66.00
<input type="checkbox"/>	02/25/2019	Daily Meal Allowance Orlando, Florida	\$53.00	\$53.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$132.00	\$132.00

New Expense | Available Receipts

Expense Type |

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Hotel Advance Deposit
- Airfare
- Per Diem Reduction
- Parking
- Unreceipted Lodging

All Expense Types

01. Travel Expenses	...03. Meals	...07. Fees
Hotel Advance Deposit	Per Diem Reduction	Currency Exchange Fees
Hotel/Airbnb	Single Day Per diems	Passports/Visa Fees
Laundry	04. Entertainment	08. Other
Lodging Paid by Other	Group Meals/Entertainment <10 Attendees	Books/Periodicals
Unreceipted Lodging	Group Meals/Entertainment 10+ Attendees	Catering
02. Transportation	05. Office Expenses	Event Supplies
Airfare	Courier/Shipping/Freight	Fees/Dues
Airline Fees	Non Capital Computer Equipment/Software	Food Products-Grocery/Bulk
Car Rental	Office Equipment/Hardware	Lab Supplies
Car Rental Fuel	Office Supplies/Software	Marketing/Promotional Costs
Car Service/Limousine	Postage	Miscellaneous
Car Service/Taxi	Printing/Photocopying/Stationery	Non Reimbursable/Personal Expense
Charter Bus/Transfers	06. Communications	Repairs/Maintenance
Fleet Fuel	Internet/Online Fees	09. University at Buffalo Foundation Only

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*.