Concur

Creating an Expense Report from a Request with a Cash Advance

1) Select the "**Expense**" tab.
2) Select the "**Create New Expense**" tab.
3) Select the "**Add**" button to attach a request to the expense report.
4) Select the "**Request**" from the list and click "**Add**".
    a. The request will auto populate most of the required information fields.

Or...

Another way to create the expense report would be via the "Expense" shortcut option.

1) Select the "**Requests**" tab.
2) Note the "**Status**" column must show "Approved" before an expense report can be created.
3) Select the blue "**Expense**" hyperlink on the far right under the "Action" column.
    a. The new expense report will populate the request information automatically and attach the request
4) You will need to provide "**Business Purpose**" and "**Request ID**" before you can continue.
5) The **Request ID** info is in the Requests tab near the bottom of the page.
6) Click "**Next**" to continue.

A list of **available cash advances** will appear. If there are more than one available, then you will need to select the correct cash advance.

7) Click "**Next**" to continue.
8) Unless Per Diem is required, click "**No**" to continue.
    a. Your cash advance will now show in the "**Outstanding Advance**" total.
9) Select the "**Expense Type**".
    a. Once you add an expense line, the amount entered will automatically deduct from the "**Outstanding Advance**" total.
10) Continue entering your expense lines until the "**Outstanding Advance**" balance has reached **"$0.00".**
11) Attach all necessary **receipts** to each expense line.
12) Click "**Submit Report**" to complete the expense report.
13) Click "**Accept & Submit**" on the Final Review message.

You will get a summary report of the expense request submission.

14) Click “**Close**” to exit.

All Done!