

Concur

Creating a Basic Expense Report without Per Diem or a Request

- 1) Select the "Expenses Tab" or "New".
- 2) From the "NEW" tab, select "Start a Report".

Or...

- 3) Select the "Expense" tab at the top.
- 4) Select "Create New Report".
- 5) Fill in all required (RED) fields and select "Next".
 - a. You will receive a reminder to attach your receipts and itinerary before you can submit the report.
- 6) Select "Next" to continue.
 - a. Unless Per Diem is required, click "No" to continue.
 - b. If you have Per Diem, see "Creating an Expense Report with Per Diem" video.

(For non PCard holders, the "New Expenses" tab will display on the right.)

If you are a PCard holder, your available PCard expenses will display on the right.

- 7) Select "New Expense" to begin adding a new expense line.
- 8) In the "New Expenses" tab, select your expense type.
 - a. For example "Airfare".

(All RED fields are required and need to be completed before continuing.)

- Note, some expense types require itemization or attendee detail before the system allows you to save the expense line.

- 9) Attach your airfare receipt to the expense line.
- 10) Click the "Save" button to save the expense line information.
 - a. To add additional expense lines, select "New Expense".

- 11) Click "Submit Report" to complete the expense report.
- 12) Click "Accept & Submit" on the Final Review message.

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