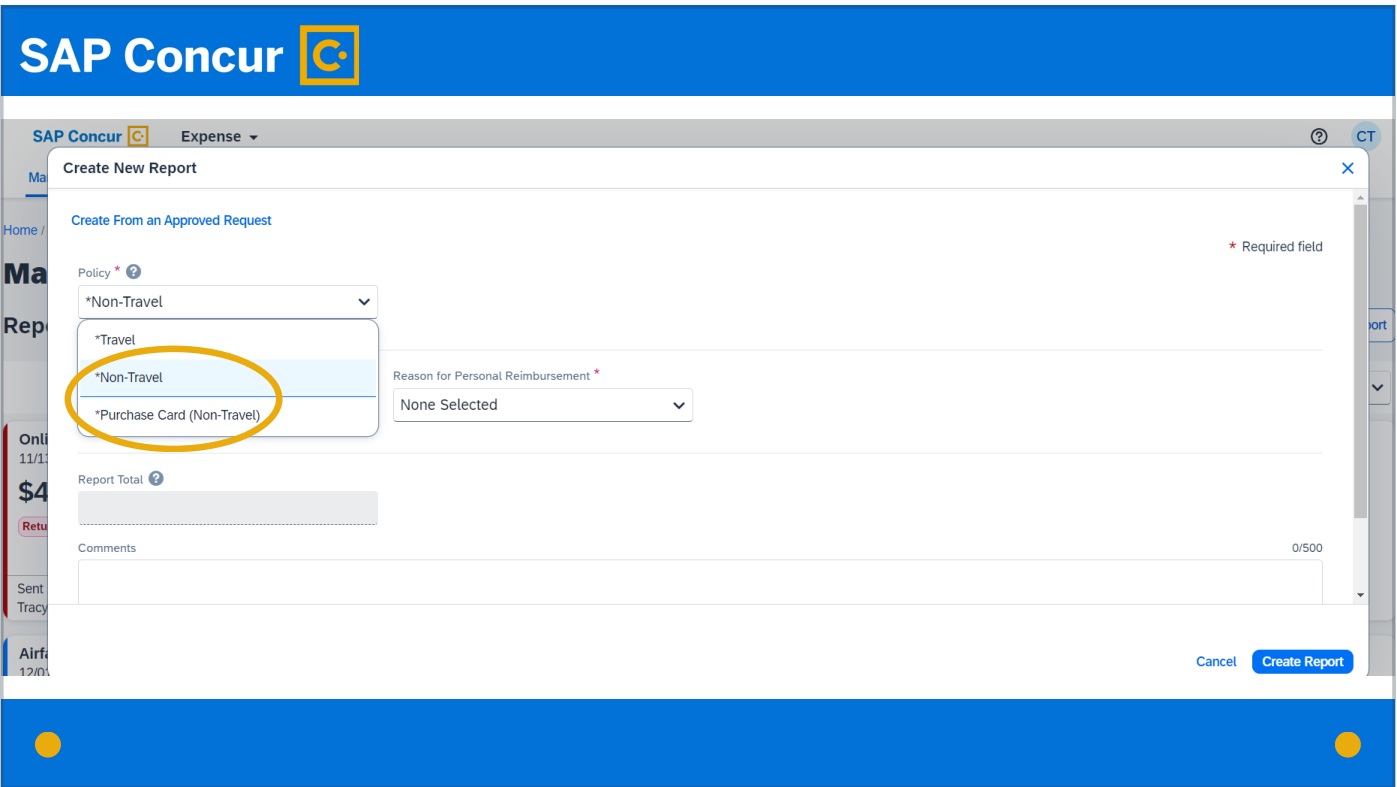


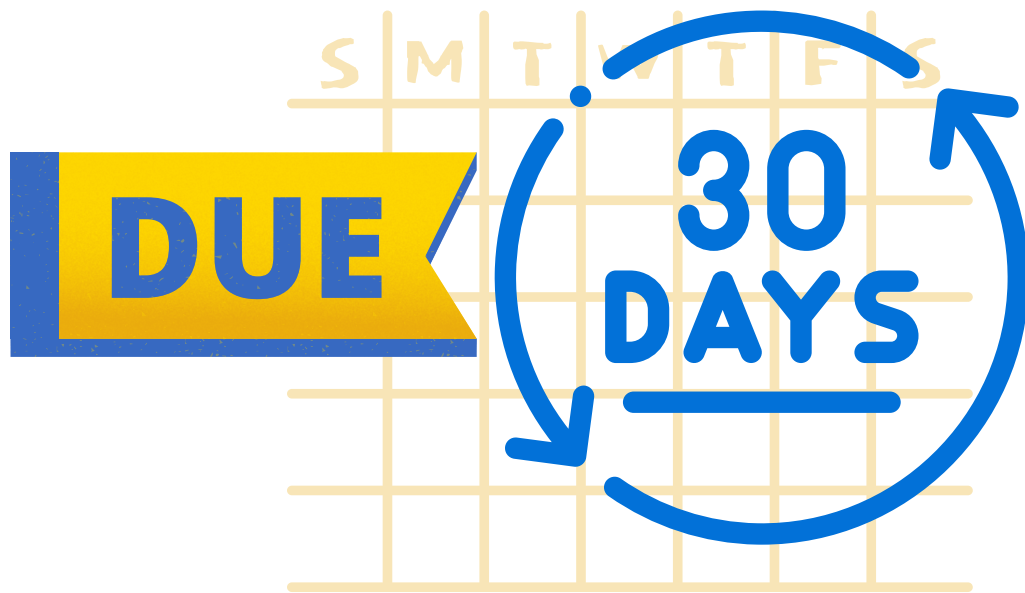
Expense Reports:

Creating Non-travel Expense Reports

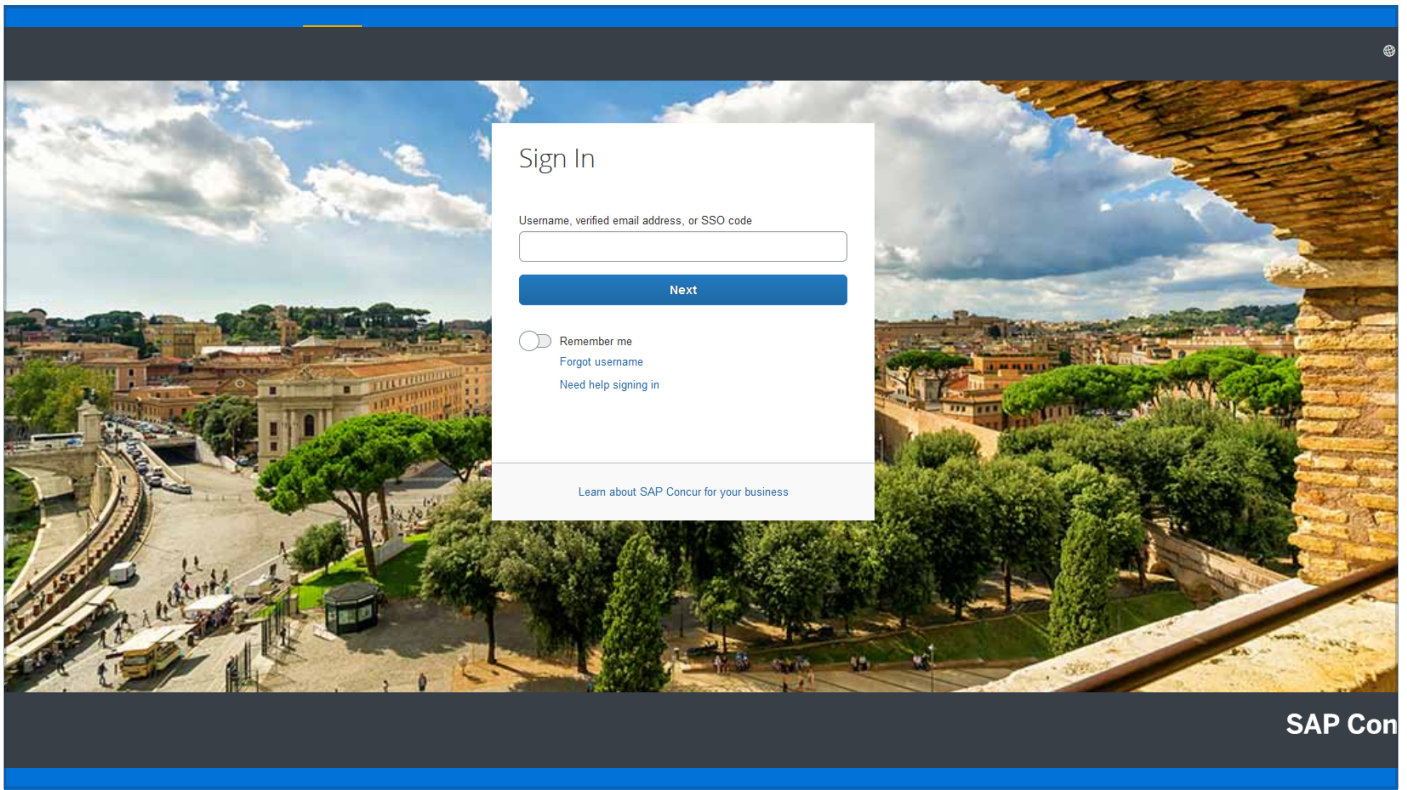
Welcome to our training on creating non-travel expense reports in Concur.



Expense reports are required for all university purchases. Non-travel expenses—all expenses that are not travel related—include expenses paid either out-of-pocket or by university credit card.



Non-travel expense reports should be submitted within 30 days of the date of purchase.



To begin the process of creating the expense report, log in to Concur.



+
Start a
Request

+
Start a
Report

02
Required
Approvals

00
Authorization
Requests

00
Available
Expenses

00
Open
Reports

Company Notes

[Deployment Toolkit](#)

You can access the deployment toolkit using this link .

[Concur Training Toolkit](#)

This link will provide information to utilize the Concur Expense System.

My Tasks

02 Required Approvals →

Nick T. | Europe Travel Request
\$3,000.00 — Travel

Stacy T. | Red Stapler
\$15.00 — Expense



00 Available Expenses →

You currently have no available expenses.

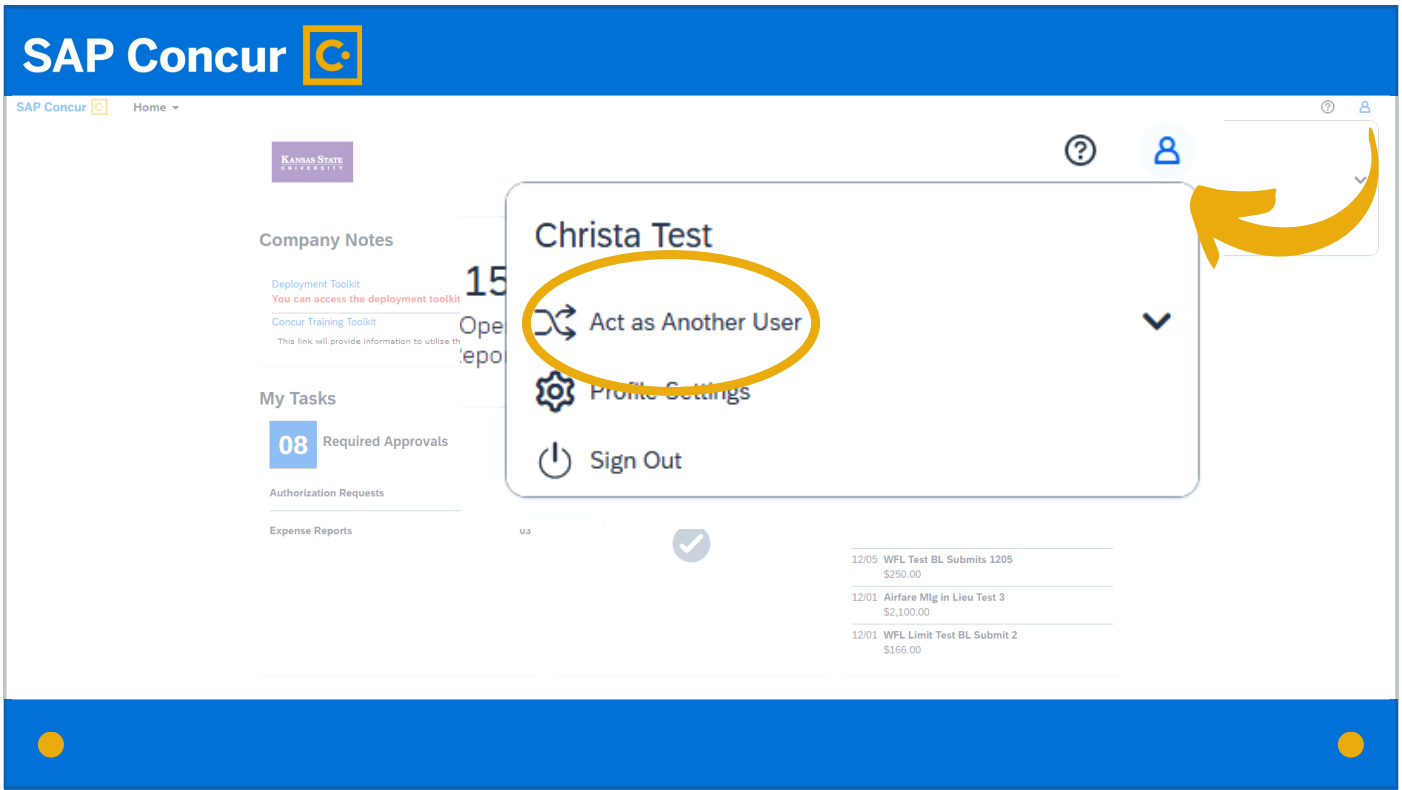


00 Open Reports →


You currently have no open reports.



The log-in process takes you to your personal profile. If you are the employee, this is the profile you want to use.



If you are a delegate acting on behalf of an employee, you want to switch to that employee's profile. Instructions on how to do this are provided in our Delegates training video.





+ Start a Request	+ Start a Report	02 Required Approvals	00 Authorization Requests	00 Available Expenses	00 Open Reports
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Company Notes

[Deployment Toolkit](#)
You can access the deployment toolkit using this link .

[Concur Training Toolkit](#)
This link will provide information to utilize the Concur Expense System.

My Tasks

02 Required Approvals → Nick T. Europe Travel Request \$3,000.00 — Travel Stacy T. Red Stapler \$15.00 — Expense	00 Available Expenses → You currently have no available expenses. 	00 Open Reports → You currently have no open reports. 
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You are now ready to create the report. Click on Start a Report.

SAP Concur Expense

Create New Report

Create From an Approved Request

* Required field

Policy *
*Travel

Report/Trip Name * Report/Trip Start Date * Report/Trip End Date *
MM/DD/YYYY MM/DD/YYYY

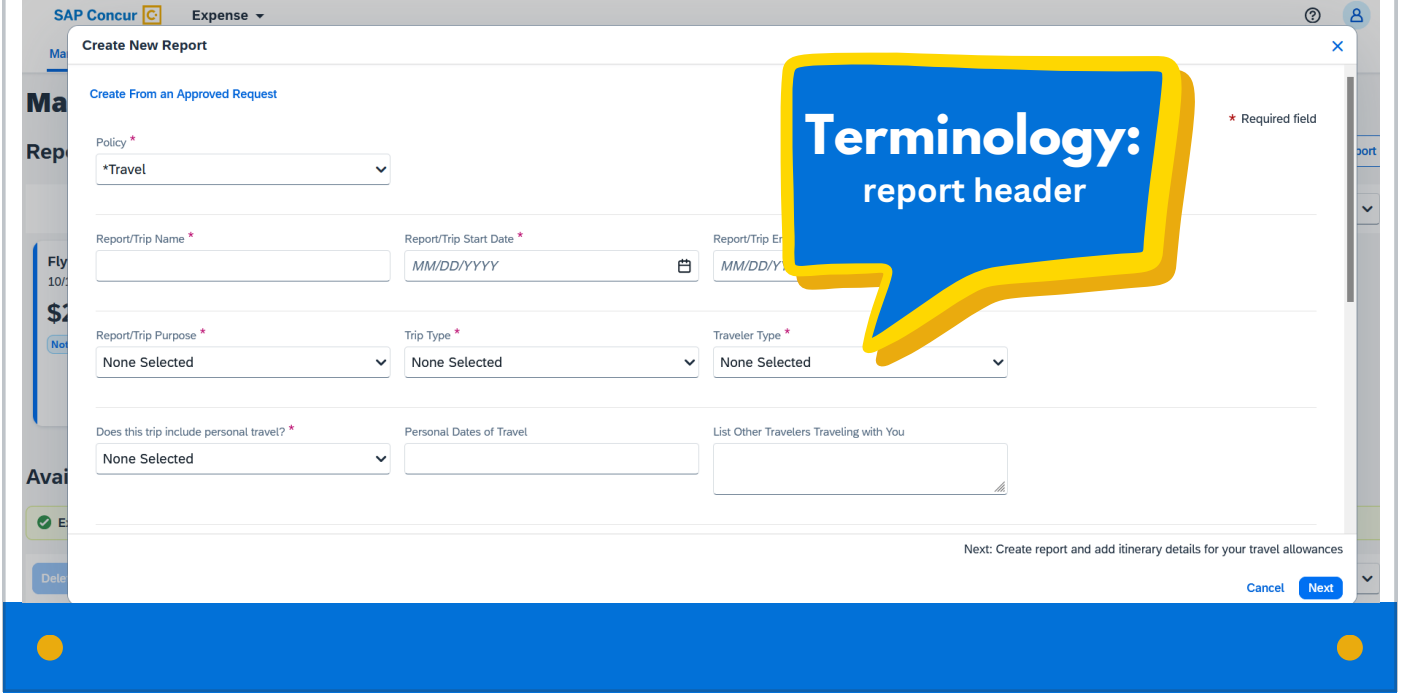
Report/Trip Purpose * Trip Type * Traveler Type *
None Selected None Selected None Selected

Does this trip include personal travel? * Personal Dates of Travel List Other Travelers Traveling with You
None Selected

Next: Create report and add itinerary details for your travel allowances

Cancel Next

You will see a screen that looks like this.



The screenshot shows the 'Create New Report' form in SAP Concur. A yellow callout box with a blue background and white text points to the form fields, stating 'Terminology: report header'. The form includes the following fields:

- Policy * (Dropdown menu with 'Travel' selected)
- Report/Trip Name * (Text input field)
- Report/Trip Start Date * (Date input field with MM/DD/YYYY format)
- Report/Trip End Date * (Date input field with MM/DD/YYYY format)
- Report/Trip Purpose * (Dropdown menu with 'None Selected' selected)
- Trip Type * (Dropdown menu with 'None Selected' selected)
- Traveler Type * (Dropdown menu with 'None Selected' selected)
- Does this trip include personal travel? * (Dropdown menu with 'None Selected' selected)
- Personal Dates of Travel (Text input field)
- List Other Travelers Traveling with You (Text input field)

At the bottom right of the form, there is a 'Next' button and a 'Cancel' button. A note below the form reads: 'Next: Create report and add itinerary details for your travel allowances'.

Concur refers to the details on this screen as the report header.

SAP Concur Expense

Manage Expenses | Card Transactions | Cash Advances

September 2023 Mileage \$237.49 Copy Report Recall Report

Pending Accounts Payable | Manager Approval | Report Number: O6VDQS

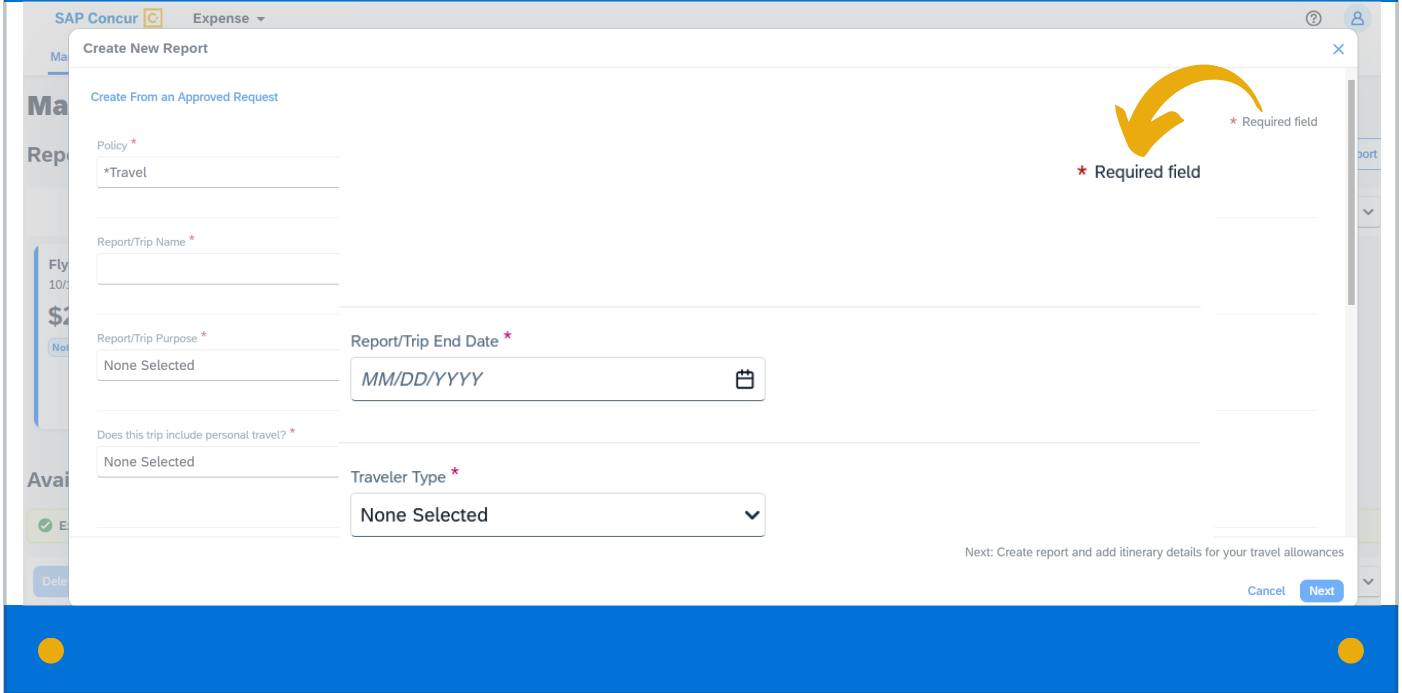
Report Details | Print/Share | Manage Receipts

Report

- Report Header
- Report Totals
- Report Timeline
- Audit Trail
- Allocation Summary
- Linked Add-ons
- Manage Requests
- Manage Cash Advances

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
	Out of Pocket	Personal Car Mileage		09/04/2023	\$43.23	\$43.23
	Out of Pocket	Hotel	Holiday Inn Hays, Kansas	09/02/2023	\$115.00	\$115.00 Itemized
	Out of Pocket	Personal Car Mileage		09/01/2023	\$79.26	\$79.26
					\$237.49	\$237.49

You can always get back to the report header screen to view or edit its details under the Report Details dropdown menu.



SAP Concur Expense

Create New Report

Create From an Approved Request

Policy *
*Travel

Report/Trip Name *

Report/Trip Purpose *
None Selected

Report/Trip End Date *
MM/DD/YYYY

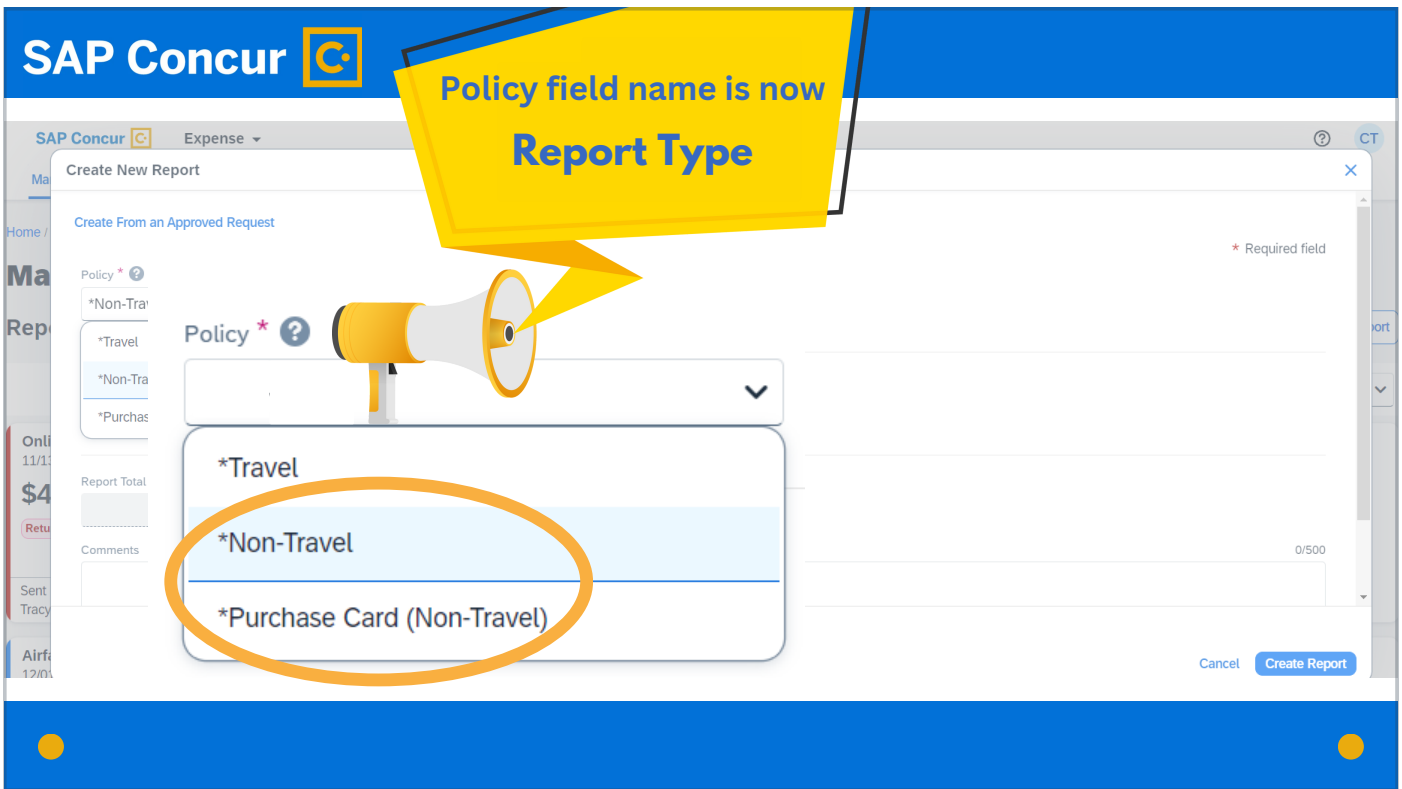
Does this trip include personal travel? *
None Selected

Traveler Type *
None Selected

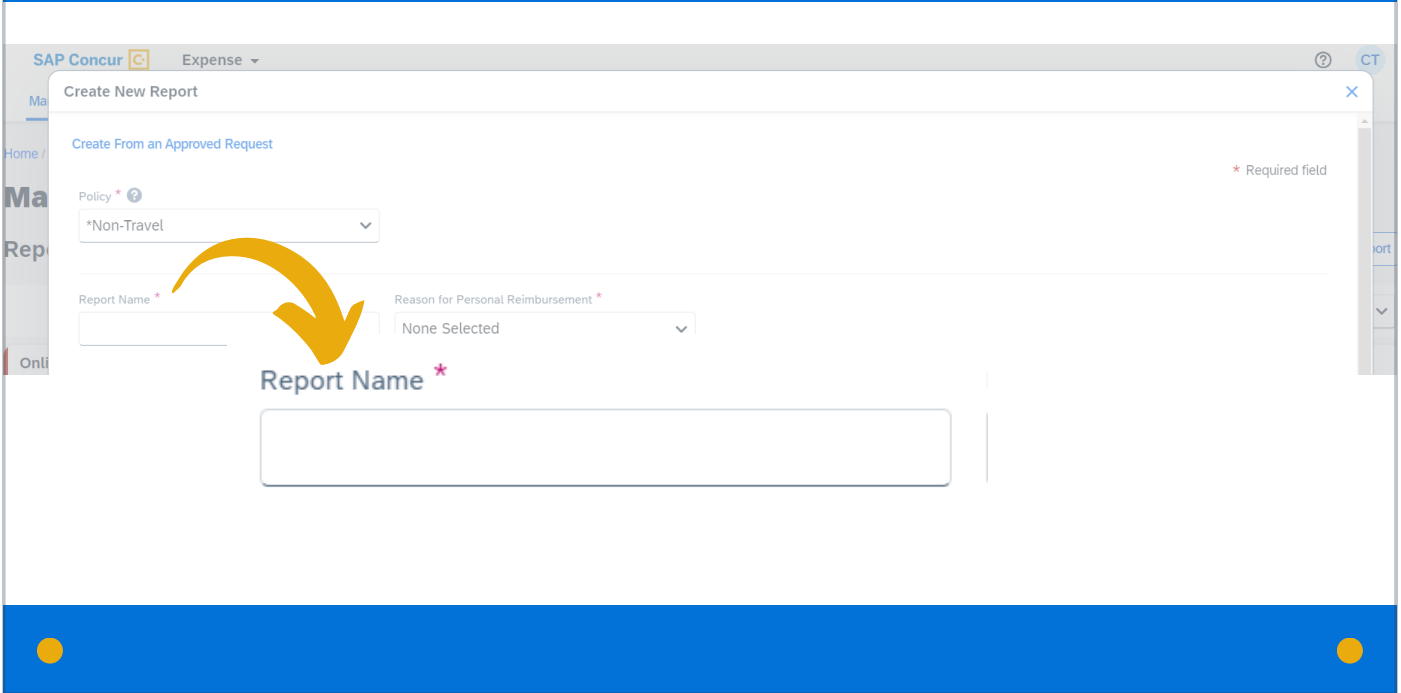
Next: Create report and add itinerary details for your travel allowances

Cancel Next

All the fields on the report header marked with a red asterisk are required fields and need to be filled out with the details applicable to the expense or expenses you are submitting.




The first field is the policy field. Concur uses the term policy to refer to the category of expenses—in this case, either non-travel expenses (those paid out of pocket) or purchase card non-travel expenses.




SAP Concur Expense

Create New Report

Create From an Approved Request

Policy *  *Required field

*Non-Travel

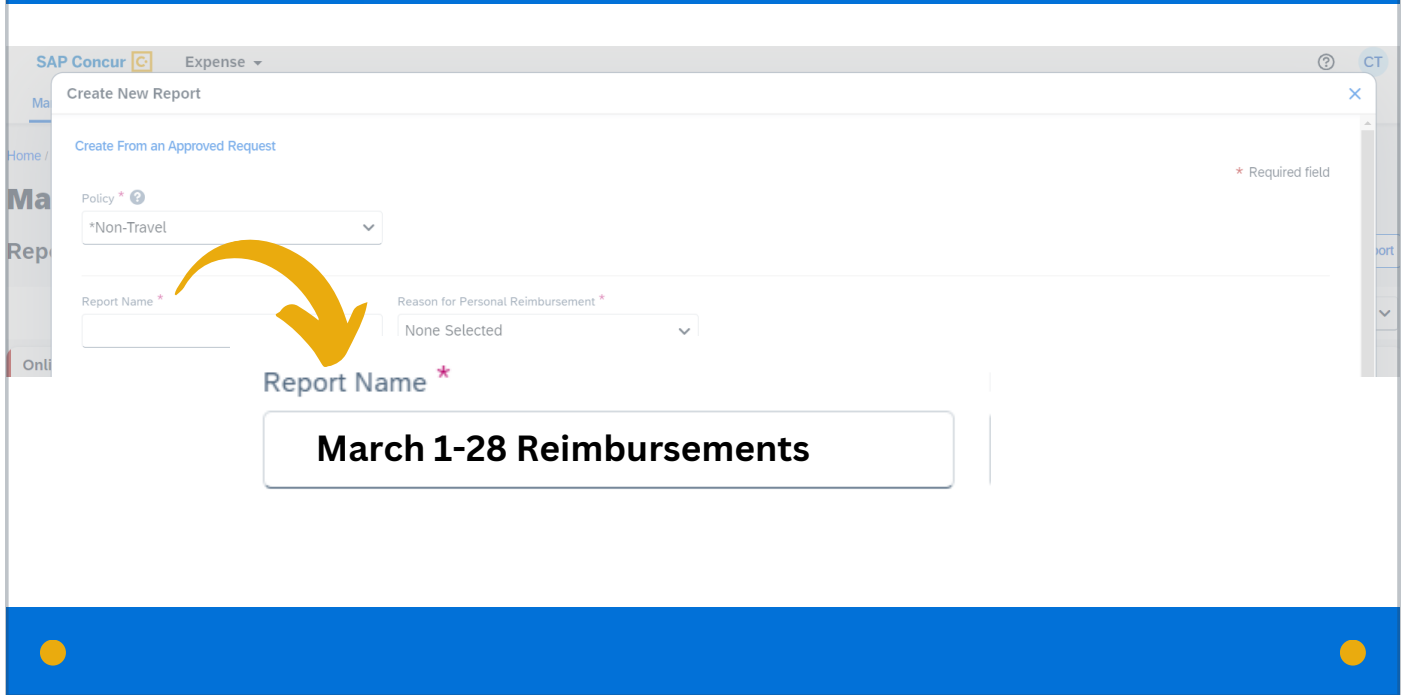
Report Name * 

Reason for Personal Reimbursement *

None Selected

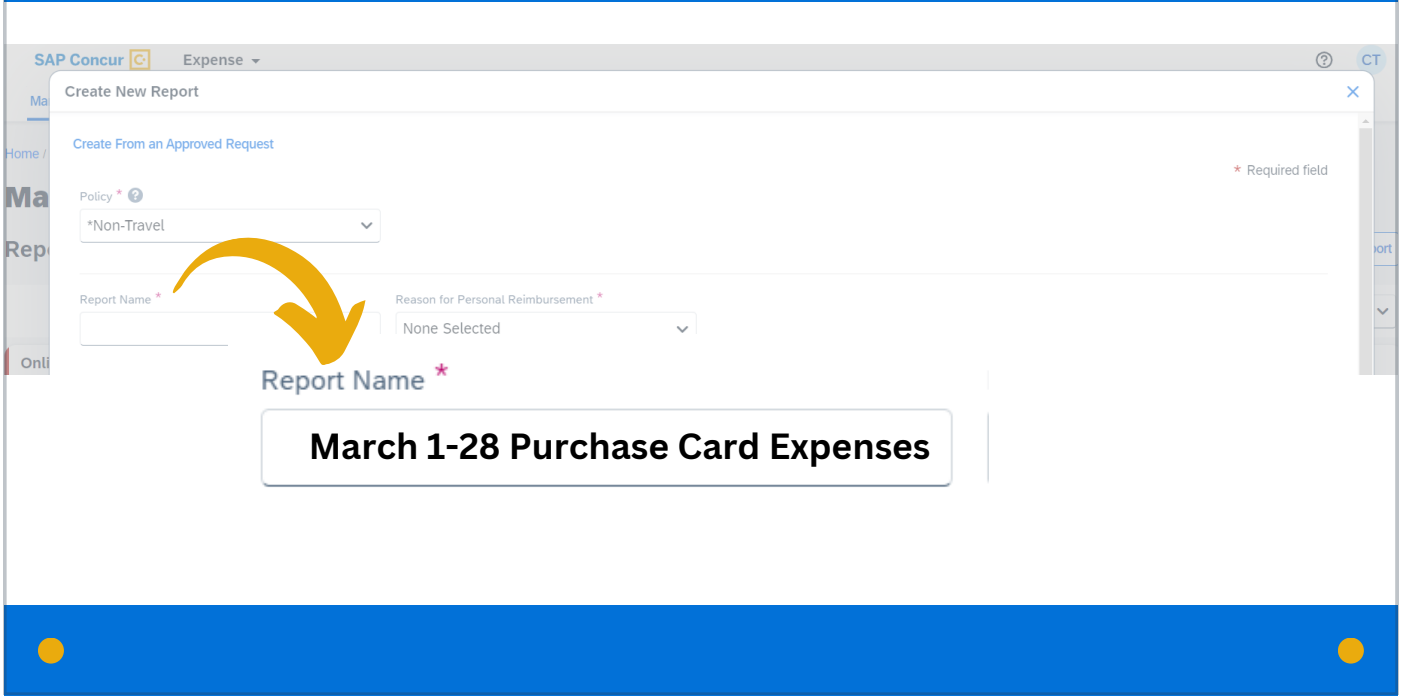
Report Name *

For the Report Name field, the name of the report should identify the expenses you are submitting:



The screenshot shows the 'Create New Report' form in SAP Concur. The form includes a 'Policy' dropdown menu set to '*Non-Travel' and a 'Reason for Personal Reimbursement' dropdown menu set to 'None Selected'. A yellow arrow points from the 'Report Name' field to a callout box containing the text 'March 1-28 Reimbursements'. The 'Report Name' field is marked as a required field with an asterisk.

for example, March 1-28 Reimbursements




SAP Concur Expense

Create New Report

Create From an Approved Request

* Required field

Policy * 

*Non-Travel

Report Name *

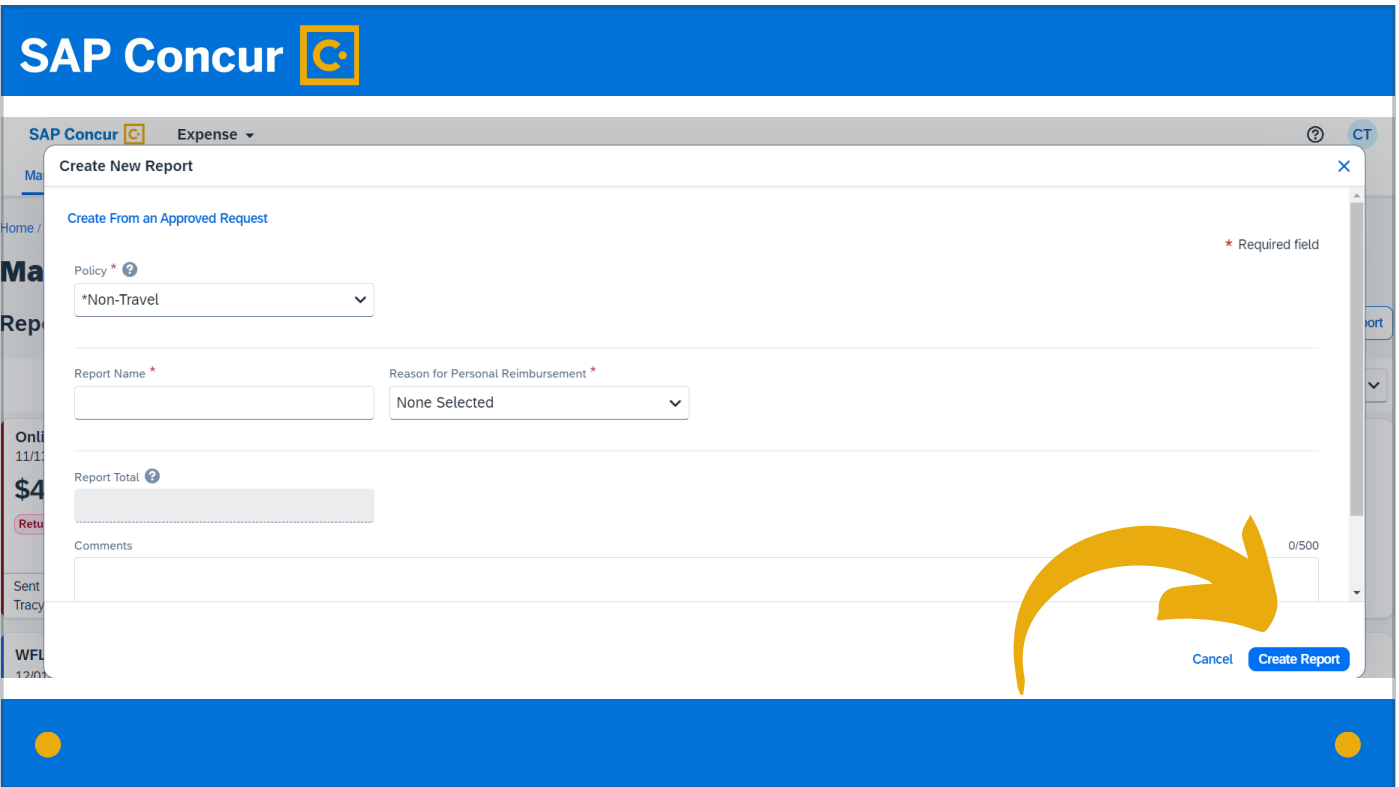
Reason for Personal Reimbursement *

None Selected

Report Name *

March 1-28 Purchase Card Expenses

or March 1-28 Purchase Card Expenses.




When all fields are complete, click the Create Report button in the bottom right corner.

Non-travel Expense Report 0108 \$0.00

[Delete Report](#) [Submit Report](#)

Not Submitted | [Report Number: OGN90Y](#)

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾

[View Available Receipts](#) 

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#) ▾

View: ▾



No Expenses

Add expenses to this report to submit for reimbursement.


You will see a screen that will allow you to manage the report.

Non-travel Expense Report 0108 \$0.00

[Delete Report](#) [Submit Report](#)

Not Submitted | [Report Number: OGN90Y](#)

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾

[View Available Receipts](#) 

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#) ▾

View: ▾



No Expenses
Add expenses to this report to submit for reimbursement.

and add expenses to the report.