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.
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.
You are now ready to create the report. Click on Start a Report.
You will see a screen that looks like this.
Concur refers to the details on this screen as the report header.
You can always get back to the report header screen to view or edit its details under the Report Details dropdown menu.
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.
For the Report Name field, the name of the report should identify the expenses you are submitting:
for example, March 1-28 Reimbursements
or March 1-28 Purchase Card Expenses.
When all fields are complete, click the Create Report button in the bottom right corner.
You will see a screen that will allow you to manage the report.
and add expenses to the report.