Quick Guide – Creating a New Expense Report

finance.vanderbilt.edu/disbursements/employee-reimbursement.php

For more detailed instructions, the online module “Creating and Submitting a Non-Travel Expense Report” is available in The Learning Exchange.

Step A: Create a New Report

1. Click Start a Report on the Concur Home page to create a new expense report.

2. Alternatively, click the Expense tab. Then, under Active Reports, click Create New Report to start a new report.

Note that the Expense tab (2) provides access to both new and existing expense reports, as well as saved receipts and expenses.

Step B: Complete the Report Header

1. Fill out all required fields (marked with a red bar 1). Report Name and Business Purpose Description are free text fields used to describe the expenses and purpose of the report. Expense Category and Business Purpose Category must be selected from a drop-down menu. Cost Center displays the default cost center in your profile, and may be updated if necessary. The optional Comment field can be used for additional description.

2. Click the Next button once all required fields have been completed.

Step C: Add expenses and submit for approval

1. Click the New Expense button to open the New Expense tab (2) on the right.

2. Click the appropriate Expense Type from the categorized list provided on the New Expense tab.

3. Based on Expense Type (2), fill out all required fields, allocate and itemize if necessary, attach receipts, and Save.

4. Once a New Expense is saved, it will be listed in the Expenses window with icons representing information saved in the report (See Icon Definitions at right).

5. Total Amount displays a total of all expenses in the report, including items marked as “Personal – Do Not Reimburse.” Total Requested will display the amount to be reimbursed via direct deposit and/or was paid via a Vanderbilt T&E Card.

6. When all expenses have been saved, click Submit Report to forward the report to your Expense Report Approver.
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Using Quick Expenses to Expedite Expense Reporting

The **Quick Expenses** feature within an expense report allows you to create multiple expenses in an expense report at one time. Click + Quick Expenses beneath the report name to use this feature.

**Step A: Use the Quick Expenses feature to create the expenses in your report**

1. Within the **Quick Expenses** window, select the **Quick Expenses** tab for non-mileage expenses.
2. Enter the **Date**, **Expense Type**, **City**, and **Amount** for each expense you wish to create. Note that the **Business Purpose** field in this window is not being used at Vanderbilt.
3. To duplicate an expense, click the + icon, then update the information as needed (e.g., date, amount). Click the - icon to delete an expense.
4. Select the **Mileage Expenses** tab for Personal Car Mileage expenses.
5. Click the **Vehicle ID** drop-down menu to select the appropriate mileage rate.
6. To create **Mileage Expenses**, click the **Map icon** (📍) to open the **Mileage Calculator**.
7. Enter your waypoints, and then click **Add Mileage to Expense**. Enter the **Transaction Date** and update the **Expense Category** and/or **Business Purpose Category** in the expense (6) (as needed). Click the 🔧 icon to delete or duplicate a trip.
8. Click **Save** when finished to create the expenses.

**Step B: Complete the expense details**

1. In the **Expenses** window, click the check box to select an expense, enter expense details and/or attach receipts. The exception icons (☐ and ☐) indicate items with missing required fields (☐) and/or receipts. Be sure all exceptions are resolved prior to submission.

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