

BU Procure to Pay

## HOW TO CREATE A NON-TRAVEL EXPENSE REPORT IN CONCUR

This guide demonstrates how to create and submit a Non-Travel Expense Report in Concur for yourself or on behalf of someone else as an expense delegate.

An Expense Report does not have to be submitted the same day it is created; you can work on the Expense Report over time and submit once all expenses for the reporting period have been added.

## CREATING EXPENSE REPORT

Note: To prepare a report on behalf of someone else, complete following steps to assign yourself as an Expense Delegate.

- Click the profile icon in the top right corner of the Concur home page and select "Act As Another User"
- Select "A Delegate for another user who has granted you this • permission," enter the individual's name, and click "Switch."
- Once you assign yourself as an Expense Delegate, continue to step 1 • below and complete the process as you would to create a report for yourself.



- 1. Click the **Home** drop-down and select **Expense**.
- 2. Click + Create New Report

SAP Concur 🖸	Expense 🗸		(?) CM
Manage Expenses	Home		
lome / Expense / Manage Ex		Company Company Admin	
wanage Ex	Travel	Tools	2
Report Library	Expense Approvals	Web Services	(⊕ Create New Report
	Reporting	Authentication Admin	? View: Active Reports ✓
	Intelligence	Travel Admin	
	Intelligence - BI Manager		
	App Center		

## BU Procure to Pay

- 3. Complete all required fields in the report header (indicated with a red asterisk).
  - Report Type: Employee Non-Travel
  - Report Name: Be as detailed as possible to make reports easily identifiable. Do not title your reports with your name or broad terms such as "Conference."
  - Start and End Dates: Per University policy, the Expense Report <u>must be submitted within 30 days</u> <u>of the trip end date.</u>
  - Cost Object: Can be edited as needed. Any restricted account starting with a 9 should be preceded with two leading zeros (e.g., 009123456789).

• [NEW] Cost Object Approver: Select the most appropriate financial approver from the drop-down (populated based on the account selected in the Cost Object field.)

4. Click on "Create Report" after filling out the report header to create the Expense Report.

SAP Concu	Create New Report				0
Manage Expens	Create From an Approved Request				Î
lome / Expense	Report Number			* Required field	
Manag					
Report	Report Type *				lew Report
	*Employee Non-Travel 🗸				
	Report Name *	Report Start Date * 🕜	Report End Date * 💡		
		MM/DD/YYYY 💾	MM/DD/YYYY		
	Cost Object * 1	Cost Object Approver * 🚱 🛛 2	0		
	(1 rocure t × •	Code V Search by Code Q			
	Comment			0/500	
		(US1043638) KANDALL WOOKE			•
				Create Report Cancel	

5. If you need to re-access the report header after creating your report, click the "**Report Details**" button and select "**Report Header**" from the drop-down menu.

SAP Concur 💽 E	Expense 🔻 rd Transactions Process Reports		0	СМ
Home / Expense / Manage Expe	nses / How to Start an Expense Report			
How to Start	an Expense Report \$0.00	Delete Report	Submit	t Report
Report Details V Print/Shar	re 🗸 Manage Receipts 🗸 Travel Allowance 🗸	View Av	vailable Red	ceipts 🗎
Report Report Header	lete Copy Allocate Combine Expenses Move to V			
Report Timeline Audit Trail				
	You have completed the process to create a Non-Travel Expense Report			
5/27/2025	2/2 © E	Boston Uni	versit	У

