

Student reimbursement in Concur



Waipapa
Taumata Rau
**University
of Auckland**

Overview information

Use this guide to create and submit a student reimbursement claim in Concur, including claims charged to a PReSS account.

Before you submit your report, you must make sure you have the following:

- Approval from faculty staff or your supervisor to claim the expense
- Coding information (department code and project ID if required). If you're unsure about the coding information, you can speak with your faculty support staff.
- Copy of your receipt or any other supporting documentation related to the charge

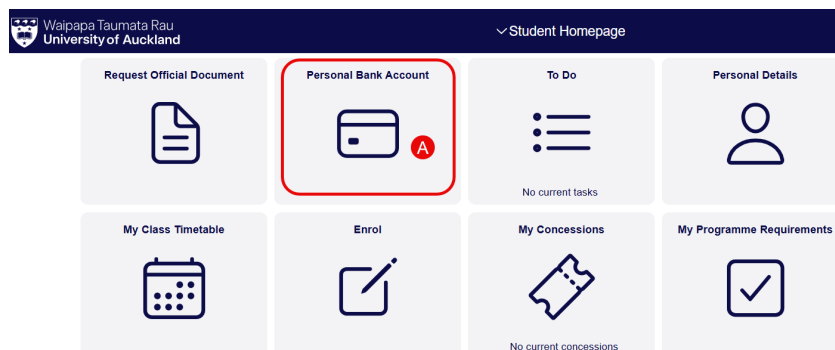
Navigation

University home page > Students > My tools > Concur

<http://www.concursolutions.auckland.ac.nz/>

Step 1 – Set up access

Before submitting your first claim, sign in to Student Services Online (SSO) and add your bank account under **Personal Bank Account (A)**.

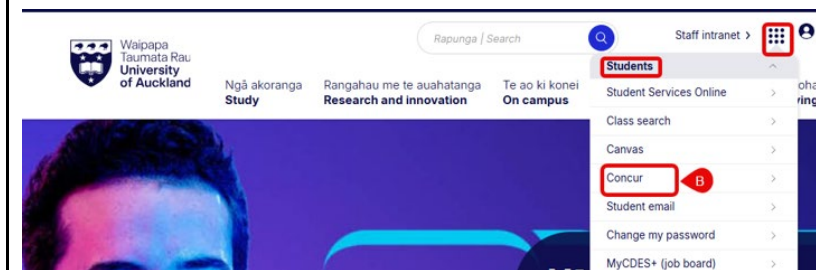


Postgraduate students: If you enter your bank account by 6:00 p.m., allow up to two business days for Concur access to be granted automatically.

Undergraduate students: After adding your bank account in SSO, allow two business days for the details to update, then call the Shared Transaction Centre (STC) on (09) 923 6410 to request Concur access. STC cannot process your access request until your bank account is recorded in SSO.

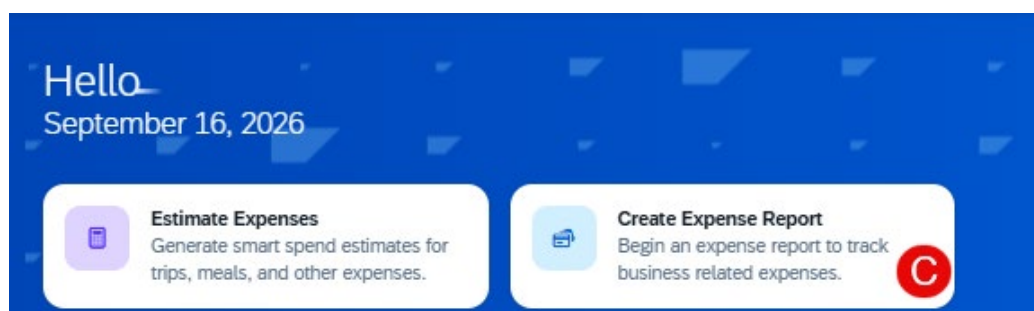
Step 2 – Access Concur

Access Concur from the [University website](http://www.concursolutions.auckland.ac.nz/) by selecting Students > Concur (B), or go directly to <http://www.concursolutions.auckland.ac.nz/>.



Step 3 – Create the report header

From the Concur home page, select Create Expense Report (C) to create the header for your reimbursement claim.



In Create Expense Report, complete the following fields:

- D. Report Type should be "Student Reimbursement"
- E. Give your report a meaningful name
- F. Enter your department code as per the details provided by your faculty
- G. For **Project**, enter your UPI when charging to a PReSS account; otherwise select **No project**.
- H. Select **No project Activity** and **No Source Type** if these options apply to your report.
- I. Add any comments where required
- J. Select **Create Report**.

Create Expense Report

Required field *

Policy *The University of Auckland Expense Poli...	Report Type * Student Reimbursement D X	Report Name * Student Reimbursement 16.09.26 E	Employee ID
Report Date 16/09/2026	Department * F X	Project * * No Project * G X	Project Activity * * No Activity * H X
Source Type * * No Source Type * I X	Product 		
Comment Reimbursement for field trip costs I			35/500

Create Report J

Step 4 – Add expense details and attachments

Once in the report header, select **Manually create expense (K)** to add expenses to your report.



No Expenses

Add expenses to this report to submit for reimbursement.



Upload Receipts
Drag and drop or select from device



Manually Create Expense
Enter expense details



Available Expenses (0)
Select from your list of expenses

- L. Select an expense type from the list of student-related costs. If the reimbursement relates to a PReSS expense, select PReSS Expenses.

^ 09. Student related costs L

- PRESS Expenses
- Student Expenses
- Student Field Trips
- Student stipends

- M. Complete the fields as required. Your department code will be the one provided to you by your faculty support team.

- N. Combine the receipt, supervisor approval, and other supporting documents into one PDF, then attach it to the expense.

Required field *
M

Expense Type *

Student Field Trips

Transaction Date *

16/09/2026

Business Purpose *

Bus Ticket

City of Purchase *

Vendor Name *

Intercity

Report Type

Student Reimbursement

Payment Type *

Cash

Amount *

60.00

Currency *

New Zealand, Dollar (NZD)

Receipt Status *

Receipt / Invoice

GST Applicable

Yes

GST amount in NZD *

Business Unit *

(UOA) University of Auckland

Department *

(5303) Shared Transaction Centre-5303

Project *

* No Project *

Project Activity *

* No Activity *

Source Type *

* No Source Type *

Receipt Hide Receipt Viewer



Upload or drag-and-drop your receipts here.

Upload with Adobe Scan
N

[Upload New Receipt](#)

[Choose From Available Receipts](#)

- O. **PReSS expenses only:** Select your faculty cost centre as the PReSS Department, then select a PReSS GL code from the drop-down list. If you are unsure which codes to use,

contact your faculty support staff.

PRess Department * 1 PRess G/L Code * 2 ?

(9441) Press-CAI-9441 × O

Comment 0/500

P. Select **Save Expense**. Repeat these steps for each additional expense in the report.

[Student Reimbursement 16.09.26](#)

New Expense

P

Save Expense ▼

If information in your report is missing or incorrect, Concur may display a red error alert (Q) or an orange warning alert (R). A red error alert means you cannot submit the report until the issue is fixed. An orange warning alert identifies a possible issue but may still allow you to submit the report. Read each alert and take any required action before submitting.

☐	Alerts ↓↑	Date ↓	Receipt ↓↑
☐	×	05/09/2026	↑

Alerts ×

All × 3 ! 2

Q R

× **Error:** You have not attached a supporting document for this expense item. Please either: 1) Attach a valid taxable supply information document (e.g. Invoice/ Receipt) that includes supplier name, GST number, date, description and amount; or 2) If you do not have a supporting document, provide an explanation in the Comment field and change GST Applicable to 'No'. (GACODE1) [View](#)

Step 5 – Submit the report

When all expense lines are complete, select **Submit Report (S)**. Review the report totals, then select **Submit Report** again. Read the user electronic agreement and select **Accept and Continue**. Your report will then be submitted for approval.

[Expense Reports](#)

Student Reimbursement 16.09.26 NZD 279.75 Not Submitted

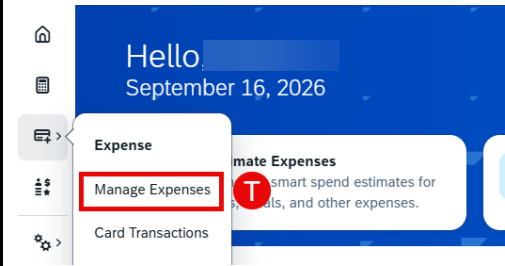
[Report Overview](#)

[Report](#) ▼ [Print/Share](#) ▼ [Manage Receipts](#) ▼

S
Submit Report

Step 6 – Check status and approver

To check your expense report's status and identify its approver, open the Expense tab on the Concur home page and select Manage Expenses (T). After the cost centre approver approves the report, it will be sent for payment to the bank account recorded in SSO.



Troubleshooting

Red alert: You cannot submit the report until the issue is resolved; follow the alert message.

Orange alert: This is a warning; read and understand it before submitting, although submission may still be available.

Access not available: Confirm that your bank account is recorded in Student Services Online and allow two business days for access.

Need help?

For help with a claim, contact your faculty support team. If Concur displays an alert, follow the instructions in the alert message to resolve the issue.

If you have feedback about this document, contact the document owner.

Document information	Document owner: Shared Transaction Centre	Document writer: Selina Phillips	Last updated: 17 September 2026
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