CONCUR | NON-TRAVEL EXPENSE REPORT

OVERVIEW

If you have an out-of-pocket expense such as business meals or other permitted non-travel expenses that need to be reimbursed, you will need to create an expense report in Concur. This document provides an overview of the process of creating the Non-travel expense report.

LOGGING IN

1. Navigate to any web browser.
2. Access Concur by clicking on the following: Concur SSO, or navigate directly to the UConn Travel homepage and click on the Concur Link.

CREATING A NON-TRAVEL EXPENSE REPORT

2. Click the drop-down list under Policy and select *UConn Non-Travel Expense.
3. Enter the name of the report in the Report Name/Purpose field.
4. Fill in the User Type field with the appropriate select based on the type of traveler you are.
5. Fill in the Account Number (and Account Organization related fields). This field should pre-populate based on profile settings.

If account information does not auto-populate:

a. Type your KFS number in the Account Number field. Then select a valid option from the menu options that display.

NOTE: Recently used accounts display at the top of the menu. When selecting a recently used account, all account related fields populate.

a. Click the Account Organization 1 dropdown; select the associated org number at the bottom of the list.
b. Select the associated org number for the remaining Account Organization fields.

TIP: If a traveler uses the same Account Number (KFS Number) for most business travel charges, it is best practice to update your profile with account number (and respective account org fields).

6. Click Next.
7. Click No when the travel allowance pop up box asks, Will you be claiming meal per diem and/or lodging expenses on this report.
8. Click **New Expense** to the right of the page.

9. Select the expense that you are adding to the expense report. For e.g. **Business Meals/Hospitality <10**.

10. The display will change to show the information required that is associated with that **expense**.

11. Enter the **Transaction date**, **Vendor Name**, **City of Purchase**, **Payment Type**, **Amount** and add a **Comment**.

12. Scroll to the bottom of the page and click **on Advance Search** to start adding your attendees.

13. A pop-up box will appear with the title **Search Attendees**.

14. You can search using any of the tabs at the top of the screen.

   a. **Search Attendees** – Allows you to search by name
   
   b. **Favorites** – Shows a list of attendees previously added to your **favorite attendees list** in your profile
   
   c. **Recently Used** – Shows a list of attendees that you recently added to previous expense reports.
   
   d. **Attendee Groups** – shows any groups that you have previously created from a previous attendee list.
   
   e. **My Team** – Shows a list of your Peers and Direct reports in Core-CT.

15. Click **Search Attendees**

16. From the drop-down list **Choose an Attendee Type** select the option that best describes the type of attendee that you will be adding.

17. If you select **Faculty/Staff** you can enter the **last and first name**, then click **search**, click the **check box** associated with the individuals name then click **Add to Expense**.

18. If you select any other option from the **Choose an Attendee Type** drop-down list you will click the **New Attendee** button to the bottom right of the pop-up box and this will give you the option to add the **Last Name**, **First Name** and **Affiliation**.

19. If you have multiple attendees of this type to add you would click **Save & Add Another** and keep repeating until you have added all the names. Then click **Save**. **After you have added all the attendees you can now attach your receipt**.

20. To add your receipt to the report, click **Attach Receipt** at the bottom right of the page.

21. Click **Browse** to upload your receipt.
22. Select the receipt that is associated with your expense then click **Attach**.

23. There will now be a new tab showing the **Receipt Image**.

24. Click **Save**. The expense has now been added to your report.

**NOTE:** Repeat the above steps for every non-travel expense type you need to add to your report.

25. Once you have added all your expenses, click the **Submit Report** button to send your expense report to the approver.

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**ADDITIONAL SUPPORT**

For help with Concur, contact travel@uconn.edu. For additional reference material, refer to [https://travel.uconn.edu/](https://travel.uconn.edu/).