

## Concur Non-Employee Travel Guide

## DATE OF LAST UPDATE

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## Bethany Rapp

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| STEP   | ACTIVITY  |   |  |  |  |
|--|---|---|--|--|--|
| Have the<br>student<br>traveler fill<br>out a <u>204</u><br><u>Payee Data</u><br><u>Record</u><br>Form, then<br>email<br>travel@hum                    | Humboldt.       A-Z Index •       quicklind         Contracts, Procurement & Accounts Payable       •       •         Welcome       Accounts Payable       •       •         Tavel       •       •       •         Forms       •       •       •  |   |  |  |  |
| travel@hum<br>boldt.edu to<br>request the<br>traveler be<br>added to<br>Concur<br>once you<br>receive<br>confirmatio<br>n the 204<br>was<br>submitted. | Change Request - Accounts Payable         To change Information on a Purchase Order or a Voucher.         Change Request - Accounts Payable (Example).         Change Request - Purchase Order         Direct Deposit for Employee Reimbursements         Disbursement Log for Gift Cards & Gift Certificates         Guest Lecturer Form         To pay a Guest Lecturer.         Hospitality Form         To pay Hospitality or Employee Recruitment expenses. (Note: Not used with ProCard transactions; see below.)         Lost Receipt Memo         Use this form when you do not have the original invoice or itemized receipt.         Payee Data Record Form Std. 204         For more information, please see Vendors/Suppliers | Divisio<br>> Adr<br>> Bus<br>> Fac<br>Manc<br>> Hur<br>> Unit<br>Office<br>> Unit |  |  |  |
| Once you<br>receive an<br>email<br>confirming<br>the student<br>was added,<br>log into SAP<br>Concur and<br>click on the<br>Requests<br>tab.           | SAP Concur C       Requests       Travel       Expense       Approvals       Reporting •         CSU State University       The California<br>State University         Hello, Bethany   | App Center  |  |  |  |
|  | TRIP SEARCH     ALERTS  | plovoo_vou aro oligiblo   |  |  |  |

|   | Requests Travel Expense Approvals Reporting*   | App Center   |  |  |  |
|---|--|--|--|--|--|
| Create New<br>Request   | Process Requests<br>Manage Requests<br>REQUEST LIBRARY   |  |  | View Active Requests ~   |  |
|   | Fraud Transaction         Unintenc           03/07/2023   9WG3         ▲           \$385.00         \$27.5 | Allocation           177V7         93                    | Example<br>INRG<br>5.00  |  |  |
| Click the   | Create New Request Request Policy *  | Non-Employee Name *                                      |  | Request/Trip Name *  |  |
| dropdown<br>for Request<br>Policy and<br>Select CSU-<br>Non-<br>Employee<br>Request<br>Policy             | *CSU-Non-Employee Request Policy   None Selected  *CSU-Request Policy                                      | Travel Start Date *                                      |  | Travel End Date * MM/DD/YYYY   |  |
|   | *CSU-Non-Employee Request Policy     None Selected     v  Destination City/State *                         | Trip Purpose * None Selected Final Destination Country * | · ·  | Personal Dates of Travel-If none enter NA *  |  |
|   |  | Search by Country/Region                                 | <b>▼</b> ]   | None Selected   If student, did they travel w/Employee? *  None Selected                 |  |
| Enter an<br>asterisk and<br>the<br>student's  | Create New Request   | tequests Expense   |  |  |  |
| student's<br>name into<br>the "Non-<br>Employee<br>Name"<br>section and<br>select from<br>the<br>drondown | Request Policy * *CSU-Non-Employee Request F   | Policy   Non-Employee Name *  Y   *zepe                  |  |  |  |
|   | Trip Type * None Selected Traveler Type *  | ~  | Travel Star<br>MM/DD<br>Trip Purpo: (HMCMP-0000<br>AZ457@HUMB0<br>SZ65@HUMB0 | 028547) (HM) ZEPEDA,ALEJANDRO<br>30LDT.EDU<br>030271) (HM) ZEPEDA,SANDRA<br>DLDT.EDU     |  |
| Choose<br>"Student" as<br>the Traveler<br>Type from<br>the drop<br>down<br>selection                      | Non Orleand  |  | New Colored  |  |  |
| Continue to fill out  | Create New Request   |  |  |  |  |
| request<br>information  | *CSU-Non-Employee Request Policy ~   | Search by Text   |  |  |  |
| would for a   | Trip Type * None Selected  | Travel Start Date * MM/DD/YYYY                           |  | Travel End Date *     Image: MM/DD/YYYY  |  |
| standard<br>request.<br>After the   | Traveler Type * Student Vone Selected  | Trip Purpose * None Selected Final Destination Country * |  | Personal Dates of Travel-If none enter NA *      Are they traveling to a banned state? * |  |
| submitted,<br>approved,<br>and the  | Non-Employee<br>Student  | Search by Country/Region                                 | 1  | None Selected  If student, did they travel w/Employee?*  None Selected                   |  |
| travel has<br>occurred,<br>create an<br>expense<br>report from<br>the request                             |  |  |  |  |  |
| and process<br>as normal.   |  |  |  |  |  |

| Non-Employee  | Guest Travel  |  |  |             |  |                        |
|---|---|--|--|-------------|--|------------------------|
|   |   |  |  |             |  |                        |
| Have the guest<br>traveler fill out<br>a <u>204 Payee</u><br><u>Data Record</u><br><u>Form</u> , then<br>email<br><u>travel@humbol</u><br><u>dt.edu</u> to<br>request the<br>traveler be<br>added to<br>Concur once<br>you receive<br>confirmation<br>the 204 was<br>submitted. |   | Humbold<br>Contract<br>Welcom Act<br>Change Request<br>To change Request<br>Change Request<br>Change Request<br>Direct Deposit for E<br>Disbursement Log<br>Guest Lecture For<br>To pay Hospitality.<br>Lost Receipt Memory<br>Lost Receipt Memory | Cit.  Accounts Payable  Accounts Accoun | A-2 Index-  | quektinks -<br>Payable<br>Divisio<br>2 Adr<br>2 Bus<br>2 Fac<br>Mans<br>2 Har<br>2 Har<br>2 Minis<br>collise |                        |
| Once the<br>guest has been<br>added as a<br>supplier, log<br>into SAP<br>Concur to<br>begin an<br>Expense<br>Report. NO<br>REQUEST IS<br>NEEDED FOR<br>GUEST<br>TRAVELERS.  | SAP Concur C<br>CSU The Calif<br>State Un<br>Hello, Bethany   | Requests<br>fornia<br>iversity   | Travel Expens  | e Approvals | Reporting ▼  | App Center             |
| Create New<br>Report  | Requests         Travel         Expense         Approval           View Transactions         Cash Advances         Process           Manage         Expenses         REPORT LIBRARY           TEST: Employee Recruitment           1/08/2022         \$243.75 | s Reporting App<br>Reports<br>S<br>1t ()<br>55   | Center<br>ud Transaction<br>V2022<br>6.00  |             | ? View. A  | tive Reports v         |
|   |   |  |  | 1           |  |                        |
| From the Policy<br>drop down,   | Create New Report Create From an Approved Request Policy * *CSU-Non-Employee Expense Policy *CSU-Inon-Employee Expense Policy *CSU-Expense Policy *CSU-Expense Policy   | ~ ~  | Business Unit for Supplier *          Y       Search by Text         Trip Type *       None Selected         Trip Purpose *       None Selected  | •           | Non-Employee Name * Traveler Type * None Selected Travel Start Date * MM//DD/YYYY                            | * Required field       |
| select "CSU-<br>Non-Employee<br>Expense<br>Policy"  | Travel End Date *   |  | Destination City/State   |             | Personal Dates of Travel-If none en  | v Cancel Create Report |

| Select the<br>business unit as<br>HMCMP, then<br>you can select<br>the guest from<br>the Non- | Policy *                           | Business Unit for Supplier *                   | Non-Employee Name *   |  |  |  |  |
|---|------------------------------------|--|---|--|--|--|--|
|   | *CSU-Non-Employee Expense Policy ~ | T - (HMCMP) HMCMP - Humboldt State Univ        | versity 🛛 💙 🗸 Search by Text  |  |  |  |  |
|   | Report/Trip Name *                 | Trip Type * None Selected                      | (HMCMP-0000029377) APARICIO, JOSAFATH N<br>JNA38@HUMBOLDT EDU<br>Traveler Ti<br>(HMCMP-0000025528) ARNOLD, CAMERON<br>CKA123@HUMBOLDT EDU |  |  |  |  |
|   |                                    | Trin Purpose *                                 | (HMCMP-0000029420) BARRY, JACOB M<br>Travel Star, JMB347@HUMBOLDT, EDU  |  |  |  |  |
| Employee  |                                    | None Selected                                  | ✓ MM/DD (HMCMP-0000025956) BELL,BENTON T  |  |  |  |  |
| Name drop<br>down.  | Travel End Data *                  | Destination Citu/Otate                         | BTB162@HUMBOLD1.EDU<br>(HMCMP-0000028602) BETTENHAUSEN,MELANIE  |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   |                                    |  | * Required field  |  |  |  |  |
| Choose "Non-  | Policy *                           | Business Unit for Supplier *                   | Non-Employee Name *     3   |  |  |  |  |
| from the  | *CSU-Non-Employee Expense Policy ~ | Y V (HMCMP) HMCMP - Humboldt State Univer      | rsity Search by Text  |  |  |  |  |
| Iraveler Type   | Panort/Trin Name *                 | Trin Tyne *                                    | Fravalar Tvna *   |  |  |  |  |
| arop aown   |                                    | None Selected                                  | Non-Employee  |  |  |  |  |
| Continue to fill  |                                    |  |   |  |  |  |  |
| in pertinent  |                                    | Trip Purpose *                                 | Non-Employee  |  |  |  |  |
| expense report  |                                    | None Selected                                  | Student   |  |  |  |  |
| information as  | Travel End Date *                  | Destination City/State                         |   |  |  |  |  |
| applies to the  |                                    |  | v   |  |  |  |  |
| trip.   |                                    |  |   |  |  |  |  |
|   |                                    | Dusiness Unicion Supplier                      |   |  |  |  |  |
|   | *CSU-Non-Employee Expense Policy ~ | T 🗸 (HMCMP) HMCMP - Humboldt State Universit   | ty 🔽 🖌 Search by Text   |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   | Report/Trip Name *                 | Trip Type *                                    | Traveler Type *   |  |  |  |  |
|   |                                    | 1-In-State                                     | ✓ Non-Employee ✓  |  |  |  |  |
| Once all the  |                                    | Trip Purpose *                                 | Travel Start Date *   |  |  |  |  |
| information is  |                                    | None Selected                                  | - MM/DD/YYYY 🗐 👩  |  |  |  |  |
| filled out, click   | Travel End Date *                  | Destination City/State                         | Personal Dates of Travel-If none enter NA *   |  |  |  |  |
| "Create   | MM/DD/YYYY                         |  |   |  |  |  |  |
| Report"   |                                    |  | Did they travel to a banned state? *  |  |  |  |  |
|   |                                    |  | None Selected ~   |  |  |  |  |
|   |                                    |  | v   |  |  |  |  |
|   |                                    |  | Cancel Create Report  |  |  |  |  |
|   | SAP Concur C Reques Add Expense    | Se   | ×   |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   | Manage Expenses Process R 0        | +  |   |  |  |  |  |
| When the  | Available E                        | xpenses Create New Expense                     |   |  |  |  |  |
| Expense Report  | Alerts: 2                          |  |   |  |  |  |  |
| is created, you   |                                    |  |   |  |  |  |  |
| can go in and   | No Expenses                        |  |   |  |  |  |  |
| add/itemize   | Example \$0.00                     | Adjust your View options to see more expenses. |   |  |  |  |  |
| expenses as   | Not Submitted                      |  |   |  |  |  |  |
| you would for   | Report Dotaile St. Drint/Ohne      |  |   |  |  |  |  |
| a standard  | Report Details V Print/Share V     |  | Close Add To Report   |  |  |  |  |
| expense   | Add Expense Edit                   |  |   |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   |                                    | No Expenses                                    | 3   |  |  |  |  |
|   |                                    | Add expenses to this report to submit          | t for reimbursement.  |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   |                                    |  |   |  |  |  |  |
|   |                                    |  |   |  |  |  |  |