



Paying Guests in Concur

Purpose: This document describes the steps needed to complete a travel request and expense report on behalf of a traveler who is not an FSU employee.

Before entering guest travel, the user should be familiar with navigating Concur, entering travel requests and entering expense reports.

Expenses can be entered in Concur for individuals who are not University employees. The following are examples of Non-Employee payments:

- A student who will be reimbursed for out-of-pocket expenses while attending a conference
- A job candidate who will be reimbursed for expenses incurred while traveling to the University for interviews

In these examples, since the payees are not University employees. You must complete a Guest ID Form and have a Guest ID number issued.

Important to note: Travel reps do not act as a delegate to enter guest travel. Guest travel is entered under the travel rep’s own profile.

Enter a Travel Request for a Guest Traveler:

1. On the Concur home page in your own profile, on the Quick Task Bar, place your mouse pointer over New, and then click **Start a Request**.
2. In the request header, the Traveler Type must be **Guest**, and you must fill in the **Guest ID** and **Guest Address** fields. Use the Guest Address field to confirm the check will go to the right address and that you have the correct guest traveler.

3. Complete the header with required information pertaining to the guest’s travel.
4. Pay particular attention to funding information (department, fund, PCBU, etc.), as it is pre-populated with the **Travel Rep’s** accounting defaults.
5. Complete segments and expenses screen in order to encumber funds for the guest’s travel.
6. Submit guest travel request for approval.



Enter an Expense Report for a Guest Traveler

1. Create an expense report from the approved travel request.

Create a New Expense Report

Report Header

Policy: FSU-GENERAL-Expense Policy

Report/Trip Name: Guest Travel | Report Date: 12/08/2017 | Trip Type: In State | Travel Start Date: 12/10/2017 | Travel End Date: 12/12/2017 | Report Key:

Traveler Type: Guest | Report/Trip Purpose: Conference/Convention | Benefit to University: Enhance recognition of Unive | Does this trip contain personal travel?: No | Dates of Personal Travel: | Additional Information:

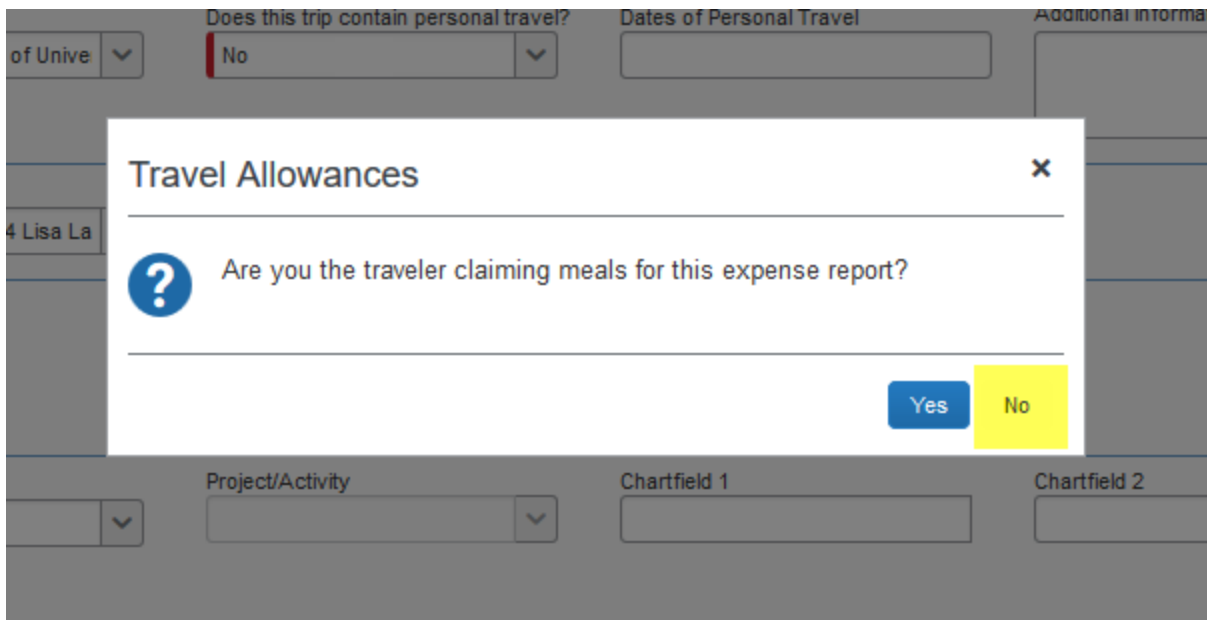
Guest Expense Reimbursement | Guest ID: (00000003) Guest Test | Guest Address: (Tallahassee FL) 1234 Lisa La

Comment: | Will be the last report for this request?:

Department: (029002) Disbursement Serv | Fund: (110) E&G General Revenue | PCBU: | Project/Activity: | Chartfield 1: | Chartfield 2: | Chartfield 3:

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
Guest Travel	34KD	No	\$501.00	\$501.00	\$501.00

2. Click the box labeled **Guest Expense Reimbursement** (an audit rule will be triggered if this box is not checked). The combination of Traveler Type (Guest), Guest ID and Guest Address fields, and the Guest Expense Reimbursement check box is what ensures payment goes to the guest traveler identified on the expense report.
3. As with all expense reports, select yes or no for **“Will be the last report for this request?”** field.
4. Click **Next**.
5. Even if you are planning to pay the guest traveler’s meal allowance, select No.



6. Concur will advance to the Expense Types.
7. Type Guest into the Expense Type search box. The expense type **“Guest Daily Meal Allowance”** will appear as an option. Select this expense type.



Expense Type

To create a new expense, click the appropriate expense.

✓ Recently Used Expense Types

- Boat Air
- Conference & Seminar Registration Fees

All Expense Types

04. Travel Meals

- Guest Daily Meal Allowance

Expense Type <input type="text" value="Guest Daily Meal Allowance"/>	Start Date <input type="text" value="12/10/2017"/>	End Date <input type="text" value="12/10/2017"/>	Trip Type <input type="text" value="In State"/>	Report/Trip Purpose <input type="text" value="Conference/Convention"/>
Additional Information <input type="text"/>	Payment Type <input type="text" value="Out of Pocket"/>	Amount <input type="text" value="36.00"/> <input type="text" value="USD"/>	Comment <input type="text"/>	

- 8. Complete one Guest Daily Meal Allowance expense line for each day's meals.
- 9. Add additional expense lines for all out of pocket reimbursements the guest traveler is entitled to.



Entering Travel Card Charges made on behalf of a Guest Traveler

Travel Reps frequently book travel with their t-card on behalf of guests. In order to associate these charges with the guest’s trip, the travel rep must list the guest traveler as an attendee for any expense line created on behalf of the guest. **You may include these charges on the guest traveler’s expense report.**

1. From the Manage Expenses screen, click **Import Expenses**.

2. Select the expenses associated with the guest’s trip and click **Move** to add them to the expense report.
3. Select the travel card expense and click on **Advanced Search**.



4. Choose Attendee Type "Guest".

Search Attendees

Choose an Attendee Type

Faculty/Staff

Faculty/Staff

Group Event 5+ Attendees

Guest

Last Name

Search Results

Attendee Name

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- 5. Search for your guest by last name and first name. If the guest’s name does not appear, click **New Attendee**.

- 6. Select the attendee type “**Guest**” and enter your traveler’s last name and first name. Click **Save**.



7. The guest traveler’s name will be associated with that expense line, however, the line is paying the travel card.

8. Click **Save** to complete the expense line.

Obtaining Guest Signature/Review

1. Once all expense lines are entered, Click on **Print/Email** and select **“*FSU-Guest Detailed Report with Audit & App flow”**

2. Print or email the report to the guest traveler for their signature. Docusign or other secure e-signature is acceptable.



- When you've received the signed expense report, attach it in Concur by opening the expense report, clicking **Receipts** and selecting **Attach Receipt Images**.

The screenshot shows the Concur 'Guest Travel' interface. At the top, there are navigation tabs for 'CONCUR', 'Requests', 'Expense', and 'Approval'. Below these are links for 'Manage Expenses', 'View Transactions', and 'View Cash A'. The main heading is 'Guest Travel'. There are buttons for '+ New Expense', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. A table of expenses is displayed with columns for 'Date' and 'Expense Type'. The 'Receipts' dropdown menu is open, showing options: 'Receipts Required', 'Check Receipts', 'Attach Receipt Images' (highlighted in yellow), 'View Available Receipts', and 'Missing Receipt Affidavit'. A sidebar on the right shows 'New Expense' and 'Expense Ty'.

<input type="checkbox"/>	Date ▼	Expense Type		
<input type="checkbox"/>		<i>Adding New Expense</i>		
<input type="checkbox"/>	12/12/2017	Travel Per Diem (Max \$80)		
<input type="checkbox"/>	12/11/2017	Mileage (Personal Vehicle Only)	\$5.34	\$5.34
<input type="checkbox"/>	12/10/2017	Guest Daily Meal Allowance	\$36.00	\$36.00
<input type="checkbox"/>	12/10/2017	Parking	\$20.00	\$20.00

- Once the signed expense report is attached and all audit rules are cleared, you may submit the expense report for approval.

The screenshot shows the top navigation bar with 'Administration' and 'Help' dropdowns, and a 'Profile' dropdown with a user icon. Below, there are buttons for 'Delete Report' and 'Submit Report' (highlighted in yellow). At the bottom, there is a link for 'Available Receipts'.