

# CONCUR VIRTUAL CONFERENCE EXPENSE REPORT

SAP Concur 	Requests	Travel	Expense	Approvals
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**CAL POLY**  
Strategic Business Services  
ADMINISTRATION & FINANCE

Virtual Conference Fees can be paid with your Concur Travel Card when paying ONLY for your conference fees. If you are paying for multiple conference fees (paying on behalf of others), use the Cal Poly Procard to pay and submit your receipts with the monthly Procard statement.

If you are paying only for yourself and have a Concur Travel Card, use the Concur card to pay the fees. A travel Request (or 1A) is NOT required as there is no actual travel occurring.

The Concur Travel Card transaction will post to your Concur Expenses page as an Available Expense, usually within 3-7 days. Follow the steps below to assign the credit card transaction to the correct Expense Type and SUBMIT the Expense Report.

1. Use your Concur Travel Card to pay your individual virtual conference fee
2. Credit card transaction will post to your Concur Expense page as “**Available Expense**”
3. Start new Expense Report (Request is not required). Complete all fields and Hit NEXT

A **Warning** will come up when hit Next. Hit Next again and it will go through

**Note:** *Out of State or International Trip Type must have a Concur Request. Use **Trip Type In-State** for all virtual conferences*

### Create a New Expense Report

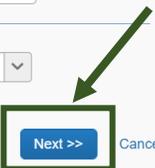
Exceptions

Expense Type	Date	Amount	Exception
N/A			 <b>WARNING:</b> An Approved Request was not linked or completed for this Expense Report. Please link corresponding Request. If a Request was never completed, please delete this Report and initiate a new Request. Upon approval, an Expense Report can then be created.

Report Header

Report Key 24308	Report/Trip Name Virtual Conference TEST	Trip Type 1-In-State	Travel Start Date 09/03/2020	Travel End Date 09/04/2020
Are you travelling to a banned state? No	Traveler Type 2-Staff	Trip Purpose Conference	Personal Dates of Travel-If none enter NA NA	Comments To/From Approvers/Processors
Business Unit (SLCMP) SLCMP - Cal Poly S	Fund (SL001) SL001 - 948-485 CSI	Department (126500) 126500 - SBS-Procl	Program	Class
Project				

**Next >>** Cancel



2. Add new Expense Registration Fees, or add from **Import Expenses** if paid with Concur Travel Card.

The screenshot shows the top navigation bar with a red '+ New Expense' button and a green-bordered 'Import Expenses' button. Below it, the 'Exceptions' section contains a warning: 'WARNING: An Approved Request was not linked or completed for this Expense Report. Please link corresponding R this Report and initiate a new Request. Upon approval, an Expense Report can then be created.'

4. Move to Current Report

The screenshot shows the 'Available Expenses' table with a dropdown menu open for the 'Move' column. The menu options are 'To Current Report' and 'To New Report'. A green arrow points to the 'Move' dropdown, and another green arrow points to the 'To Current Report' option.

5. Expense will be added to report. There may be warnings to add City of Purchase or Expense Type. Update any required fields
- a. Attach receipt for charges over \$40, then Save.

The screenshot shows the 'Expenses' table with one entry: '09/03/2020 Registration/Fees ABC Conference, Sacramento, C' for \$250.00. Below the table, the 'TOTAL AMOUNT' and 'TOTAL REQUESTED' are both \$250.00. To the right, the 'Expense' form is open, showing fields for 'Expense Type' (Registration/Fees), 'Transaction Date' (09/03/2020), 'Vendor Name' (ABC Conference), 'City of Purchase' (Sacramento, California), and 'Payment Type' (Out of Pocket). A green arrow points to the 'Attach Receipt' button at the bottom right of the form.

6. Hit **Submit Report**. The report will be submitted for budget and manager approvals. President approvals not required on Expense Reports or for virtual conferences



Manage Expenses   View Transactions   View Cash Advances   Process Reports

### Virtual Conference TEST

Delete Report   **Submit Report**   Hide Exceptions

[+ New Expense](#)   [Import Expenses](#)   [Details](#)   [Receipts](#)   [Print / Email](#)

Exceptions

Expense Type	Date	Amount	Exception
N/A			<b>⚠ WARNING:</b> An Approved Request was not linked or completed for this Expense Report. Please link corresponding Request. If a Request was never completed, please delete this Report and initiate a new Request. Upon approval, an Expense Report can then be created.

Expenses

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<b>Adding New Expense</b>				
<input type="checkbox"/>	09/03/2020	<b>Registration/Fees</b> ABC Conference, Sacramento, C	\$250.00	\$250.00

TOTAL AMOUNT **\$250.00**      TOTAL REQUESTED **\$250.00**

New Expense

Expense Type

*To create a new expense, click the appropriate expense type below or type the expense type in the field above.  
To edit an existing expense, click the expense on the left side of the page.*

**✓ Recently Used Expense Types**

- Registration/Fees
- Personal Car Mileage