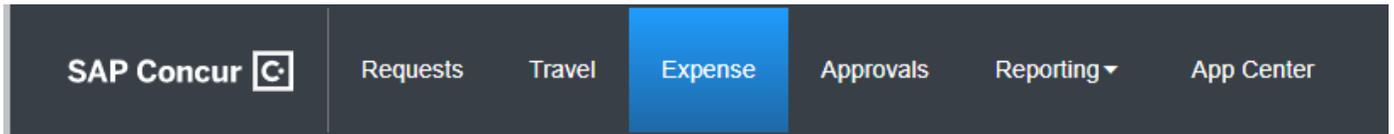


EXPENSE REPORT: GROUP TRAVEL



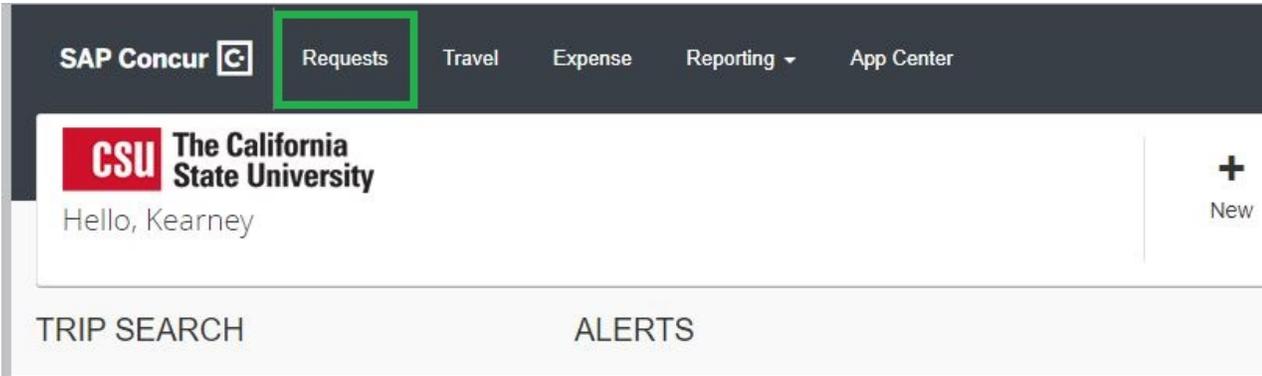
CAL POLY

Strategic Business Services

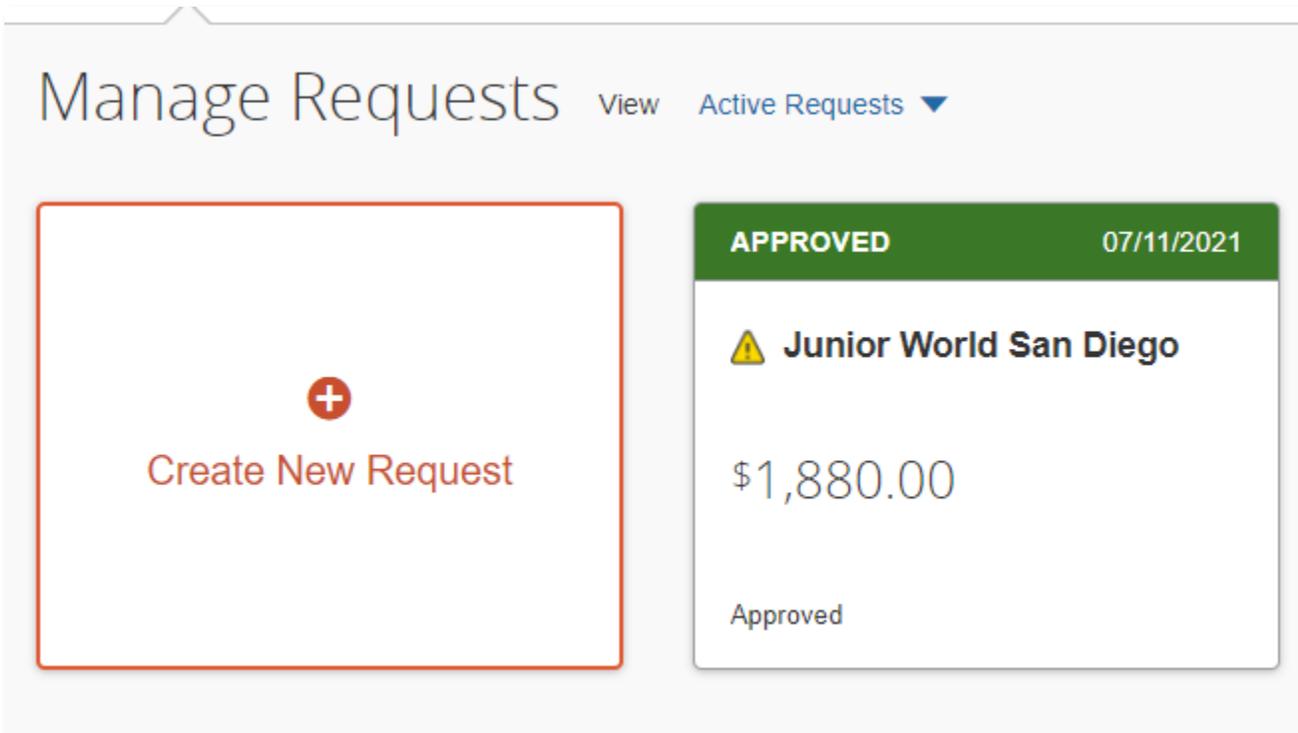
ADMINISTRATION & FINANCE

Group Travel is defined as a Concur user (Cal Poly employee with Concur access) paying on behalf of others (students or non-employees)

1. Log into Concur and click **Request** at the top. It is best to start your Expense Report from your Approved Request.



2. Click anywhere in the Approved Request box to Open the Request



- Click Create Expense Report at top right. Note – if the Request has not been fully approved, this option is not yet available.

Junior World San Diego \$1,880.00
 Approved | Request ID: 4LCJ

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

More Actions | Create Expense Report

- This will start your new Expense Report and open the Expense Report to add expenses

SAP Concur | Requests | Expense

Manage Expenses | View Transactions

Alerts: 2

NCAA Regionals \$1,320.51

Not Submitted

Report Details | Print/Share | Manage Receipts | Travel Allowance

REQUEST
 Approved
 \$5,700.00

Add Expense | Edit | Delete | Copy | Allocate

Move all expenses made with your Concur travel card into your report. These expenses are under AVAILABLE EXPENSES. Click on the box next to all expenses for the expense report that you are creating to **Move to** that report.

****Wait until all of your credit card transactions have posted to your Concur before submitting your Expense Report.**

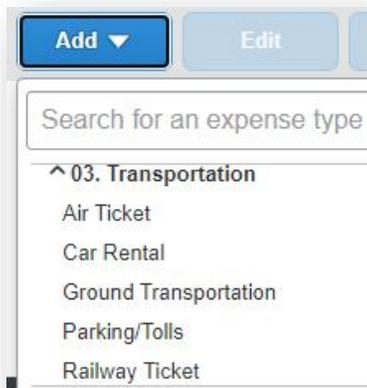
AVAILABLE EXPENSES View: All Expenses

Delete | Combine Expenses | Move to

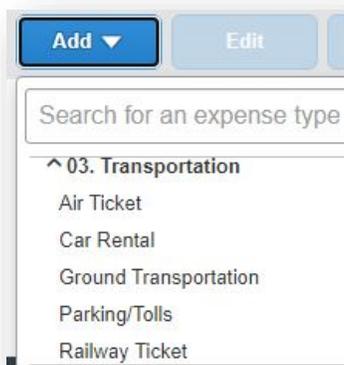
Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>	*Ghost Card-USBank	Airfare	AGENT FEE 8900808969288	04/26/2021	\$5.00
<input checked="" type="checkbox"/>	*Ghost Card-USBank	Airfare	United Santa Barbara	04/26/2021	\$722.40
<input type="checkbox"/>	*CSU-USBank-CBCP	Undefined	AMERICANHORT	04/07/2021	\$35.00

5. Once you have all of your expenses added to your Expense Report, you may need to update the Expense Type for some. Next steps will include some examples of expense types to add for team/group travel.

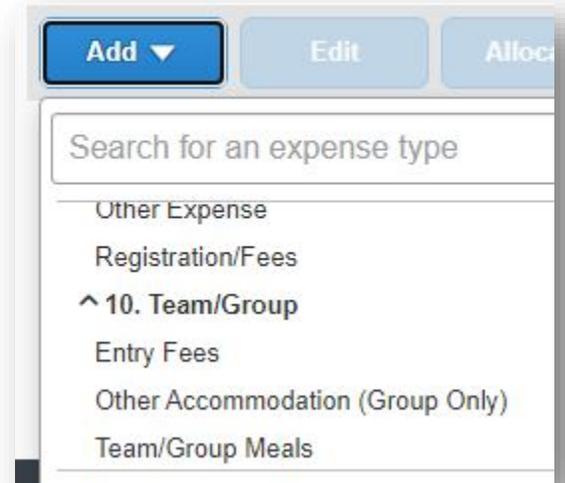
A. AIRFARE: Include the receipt for the total cost of the airfare for all tickets and use the Air Ticket Expense Type



B. Car Rental or Ground Transportation: includes Uber/Lyft or Taxi's.



C. **Accommodations:** To add the cost of multiple hotel rooms or AirBNB/VRBO rentals, scroll to the bottom and select **“Other Accommodation”** expense type. This will allow you to enter in the total for all rooms. Under **COMMENTS**, add the cost per person per night (must be under \$275 per person before taxes), click **SAVE**



D. **Meals:** To add the cost of meals for the group, select **Team/Group Meals**.



- A.** Under **COMMENTS**, provide information regarding the cost per person per day. For meals over \$40 an itemized receipt must be included. Click **SAVE EXPENSE**

Team/Group Meals \$98.74 Cancel **Save Expense**

05/08/2021 | SQ *ZADNA BOWL | Corporate Card Hide Receipt

Details | Itemizations

Allocate * Required field

Expense Type *
Team/Group Meals

Transaction Date *
05/08/2021

City of Purchase
Palo Alto, California

Payment Type
*CSU-USBank-CBCP

Enter Vendor Name
SQ *ZADNA BOWL

Amount
98.74

Currency
US, Dollar

Request *
05/08/2021, \$1,500.00 - NCAA R...

Comments To/From Approvers/Processors
meal for 7 - \$14 per person with tax and tip

Zadna Bowl

461 Emerson St May 8, 2021
Palo Alto, CA 94301-1605 5:50 PM
(650) 384-6111 Faiez

PURCHASE

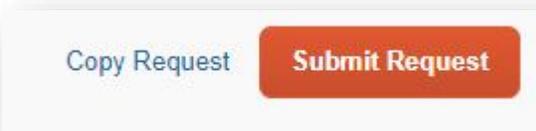
Receipt: dKSO
Ticket: Sofie Aagaard
Authorization: 095375

VISA CREDIT
AID A0 00 00 00 03 10 10
ATC: 0013
PSN: 01

FOR HERE

Beef Shawarma x 3	\$42.00
Saffron Basmati Rice	
Chicken Shawarma x 2	\$28.00
Saffron Basmati Rice	
Mix Plate (Choose Two)	\$16.00
<hr/>	
Subtotal	\$86.00
Sales Tax	\$7.74
Tip	\$5.00
<hr/>	
Total	\$98.74
Visa 9298 (Chip)	\$98.74
Sofie Aagaard	

- B.** Once you have added all expenses for your trip, click **SUBMIT REPORT**. Your Expense Report will be routed to the Budget Analyst for your department for approval, and then to your Manager for approval and finally to the Processor in Payment Services to complete your Report.



- C.** If any money is owed to the traveler or owed back to the University, wait to hear from your payment tech on the steps to take to pay back the University, or to receive your payment.