



DATE OF LAST UPDATE

07/19/2023

LAST UPDATED BY

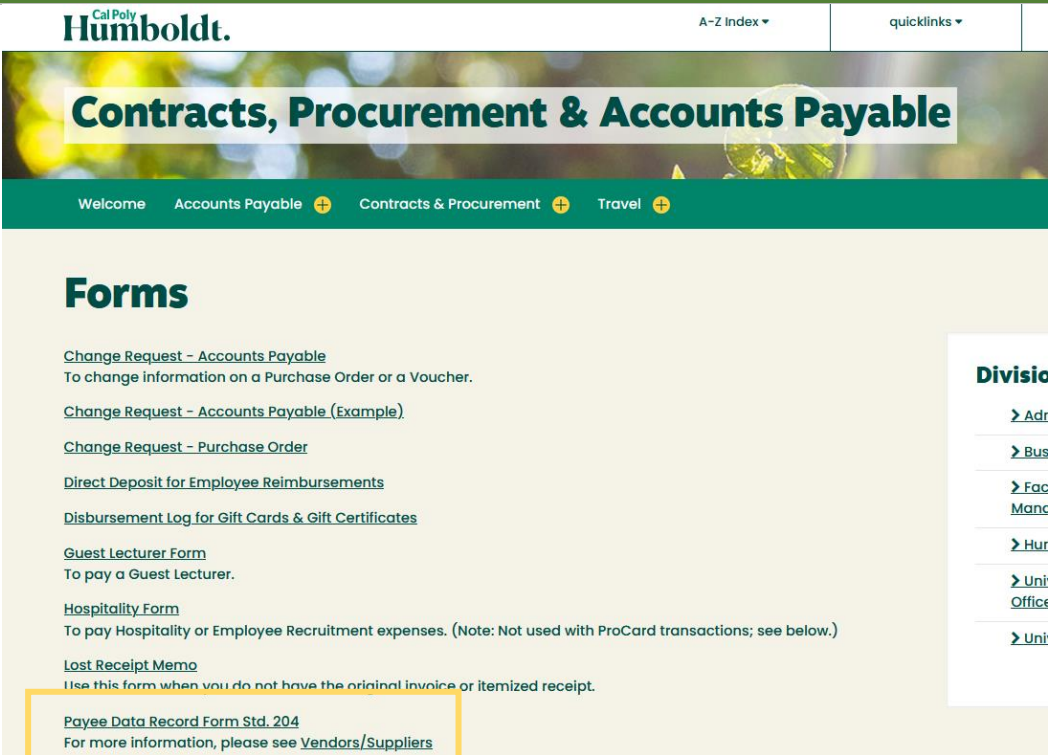
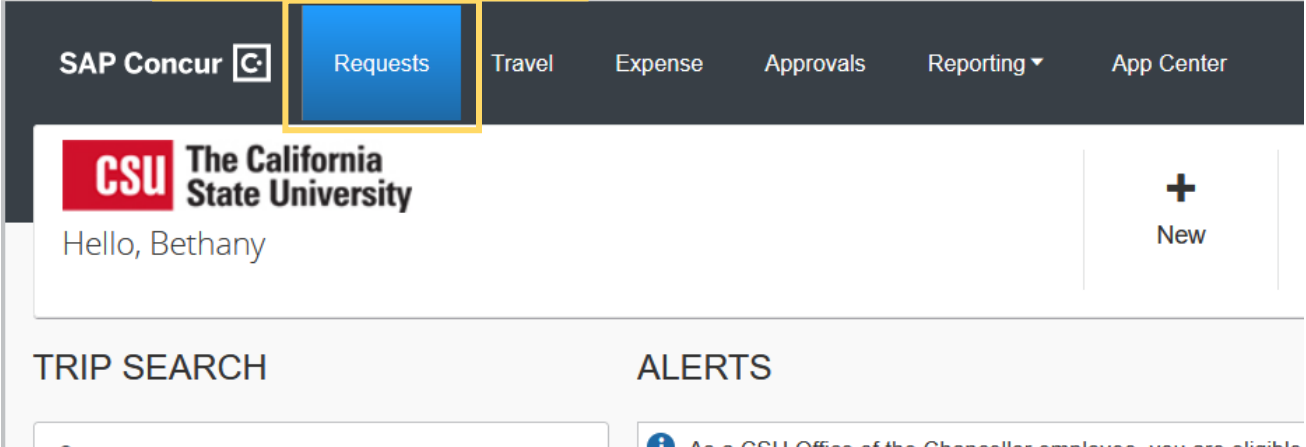
Bethany Rapp

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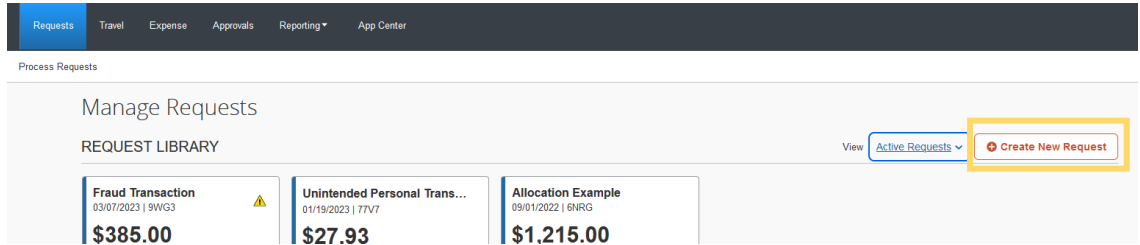
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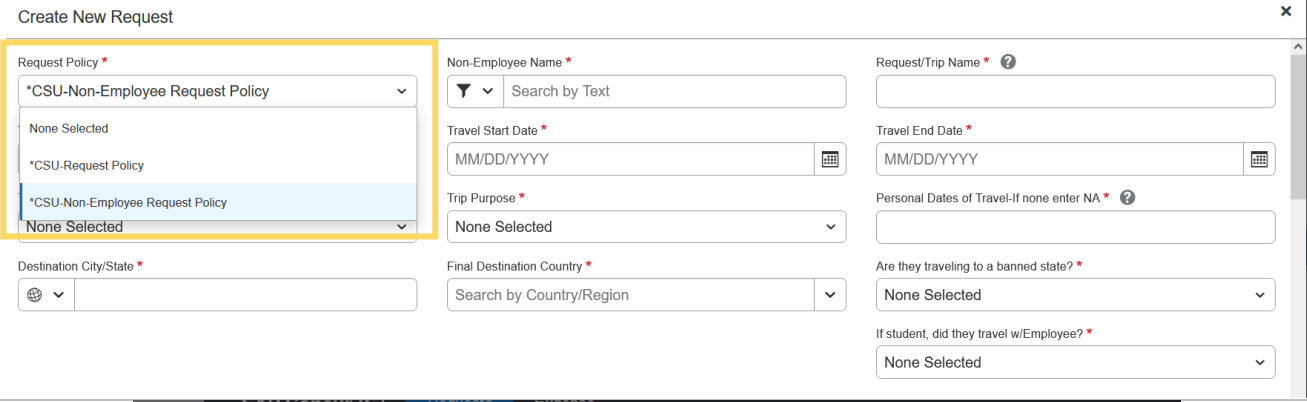
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STEP	ACTIVITY
<p>Have the student traveler fill out a 204 Payee Data Record Form, then email travel@humboldt.edu to request the traveler be added to Concur once you receive confirmation the 204 was submitted.</p>	 <p>The screenshot shows the Cal Poly Humboldt Concur portal. The main heading is "Contracts, Procurement & Accounts Payable". Under the "Forms" section, the "Payee Data Record Form Std. 204" is highlighted with a yellow box. The description for this form is: "For more information, please see Vendors/Suppliers".</p>
<p>Once you receive an email confirming the student was added, log into SAP Concur and click on the Requests tab.</p>	 <p>The screenshot shows the SAP Concur navigation bar. The "Requests" tab is highlighted with a yellow box. Below the navigation bar, the user is logged in as "Bethany" and the "TRIP SEARCH" and "ALERTS" sections are visible.</p>

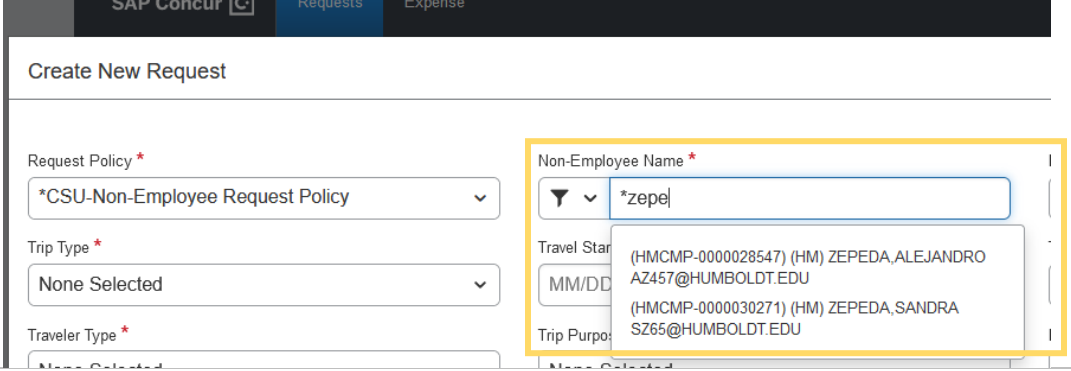
Create New Request



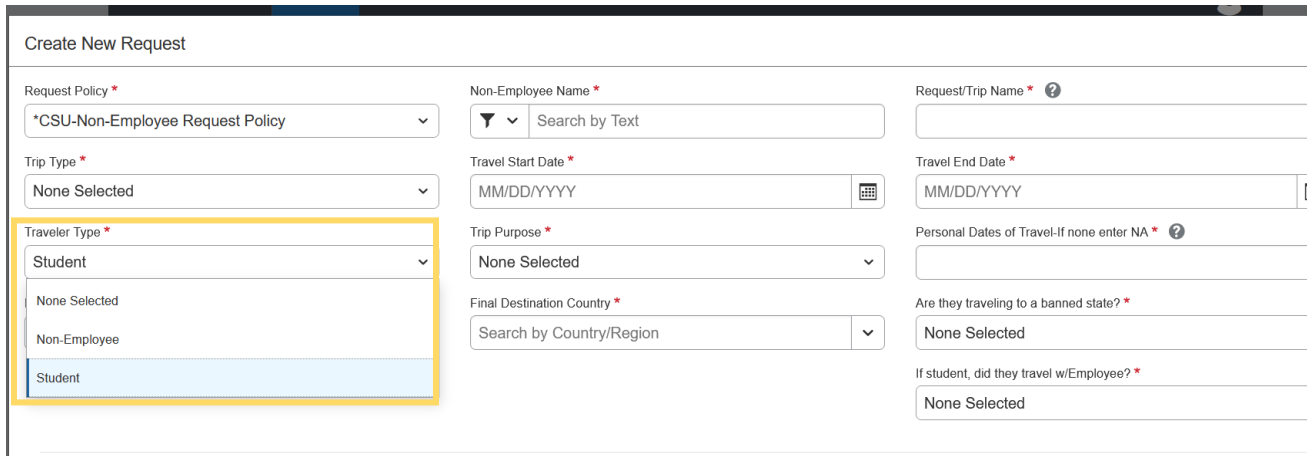
Click the dropdown for Request Policy and Select CSU-Non-Employee Request Policy



Enter an asterisk and the student's name into the "Non-Employee Name" section and select from the dropdown.

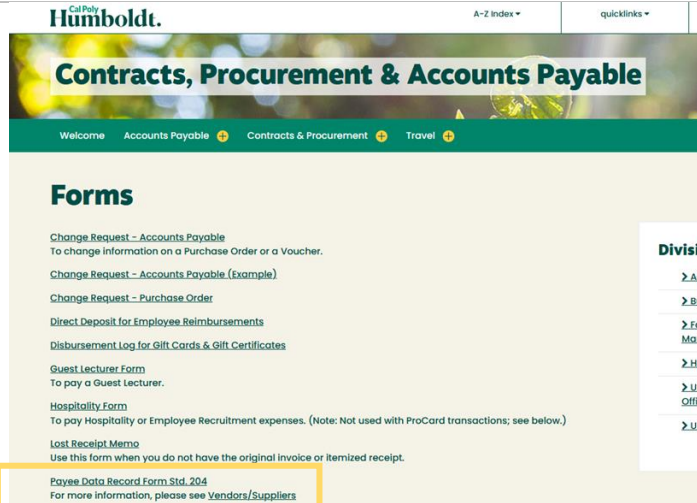


Choose "Student" as the Traveler Type from the drop down selection. Continue to fill out request information as you would for a standard request. After the request is submitted, approved, and the travel has occurred, create an expense report from the request and process as normal.

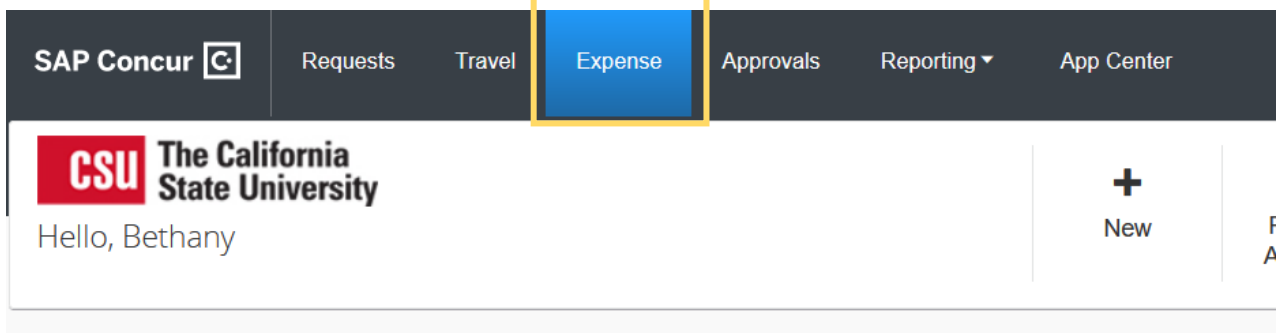


Non-Employee Guest Travel

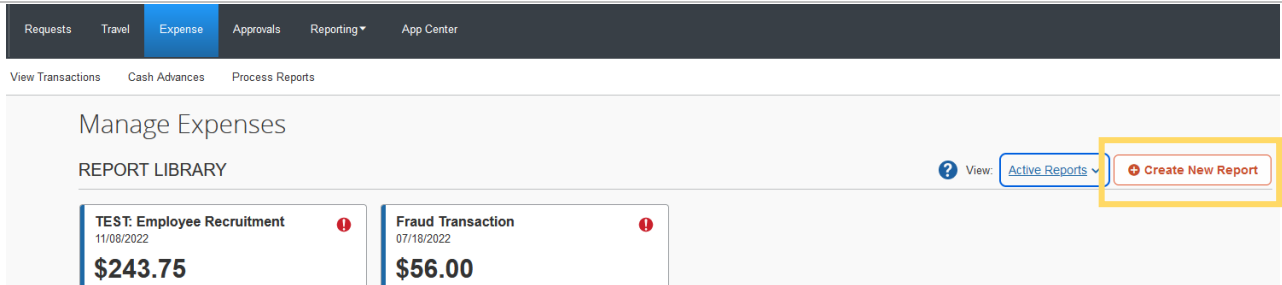
Have the guest traveler fill out a [204 Payee Data Record Form](#), then email travel@humboldt.edu to request the traveler be added to Concur once you receive confirmation the 204 was submitted.



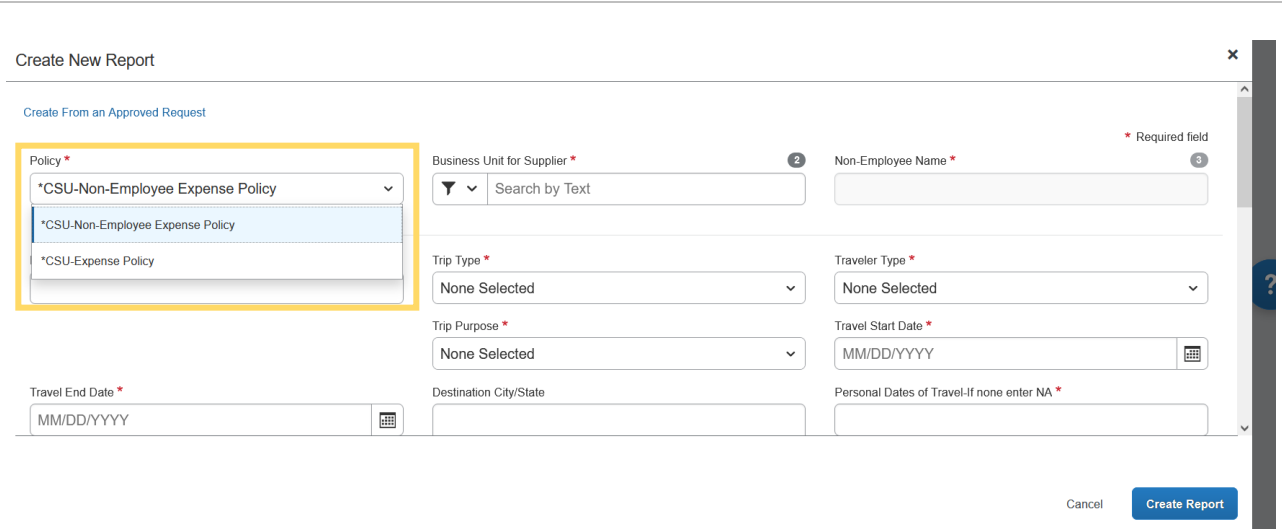
Once the guest has been added as a supplier, log into SAP Concur to begin an Expense Report. NO REQUEST IS NEEDED FOR GUEST TRAVELERS.



Create New Report



From the Policy drop down, select "CSU-Non-Employee Expense Policy"



Select the business unit as HMCMP, then you can select the guest from the Non-Employee Name drop down.

The screenshot shows a form with the following fields:

- Policy: *CSU-Non-Employee Expense Policy
- Business Unit for Supplier: (HMCMP) HMCMP - Humboldt State University
- Report/Trip Name: (empty)
- Trip Type: None Selected
- Trip Purpose: None Selected
- Travel End Date: MM/DD/YYYY
- Destination City/State: (empty)
- Non-Employee Name: Search by Text dropdown menu is open, showing a list of names including APARICIO, JOSAFATH N, ARNOLD, CAMERON, BARRY, JACOB M, BELL, BENTON T, and BETTENHAUSEN, MELANIE.

Choose "Non-Employee" from the Traveler Type drop down menu. Continue to fill in pertinent expense report information as applies to the trip.

The screenshot shows the same form as above, but with the following changes:

- Report/Trip Name: (empty, highlighted with a red border)
- Traveler Type: Non-Employee (selected)
- Travel Start Date: MM/DD/YYYY
- Personal Dates of Travel-If none enter NA: (empty)
- Did they travel to a banned state?: None Selected

Once all the information is filled out, click "Create Report"

The screenshot shows the form with the 'Create Report' button highlighted in a yellow box. The 'Report/Trip Name' field is still empty.

When the Expense Report is created, you can go in and add/itemize expenses as you would for a standard expense report.

The screenshot shows an 'Add Expense' dialog box overlaid on an expense report. The report shows 'Example \$0.00' and 'Not Submitted'. The dialog box contains:

- A counter showing '0 Available Expenses'.
- A '+ Create New Expense' button.
- Text: 'No Expenses. Adjust your View options to see more expenses.'
- 'Close' and 'Add To Report' buttons.