

How to create an Expense Report for an Event, with Attendees

This aid will cover how to create an expense report for an event with a group of attendees. Adding a group of attendees to an event's expense report should be limited to certain expense types. For example, a catering expense would involve the group so they would need to be added. An expense for decorations within the same expense report would not need the group of attendees added to it.

This Job Aid assumes you have already submitted a travel request and it was approved.

Screenshots are provided to use as visual guides for certain steps.

After your request is approved...

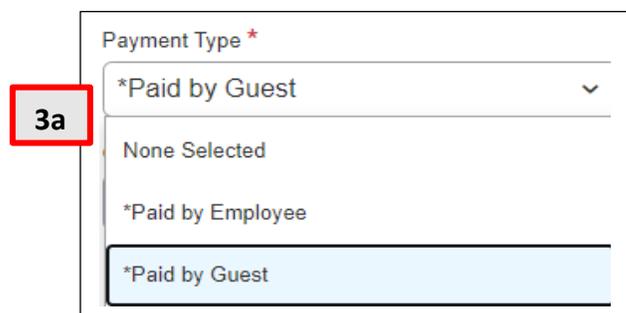
1. Open the approved travel request and click **Create Expense Report** in the upper-right corner.

2. Click **Add Expense**.

- **Available Expenses** – You choose from a list of charges you have paid using the Tcard or created through Concur/Concur Mobile.
- **Create New Expense** – Only for expenses if they were out-of-pocket expenses, NOT done through Concur/Concur Mobile, and NOT paid on the Tcard. Search and select the expense you want to add to the report.

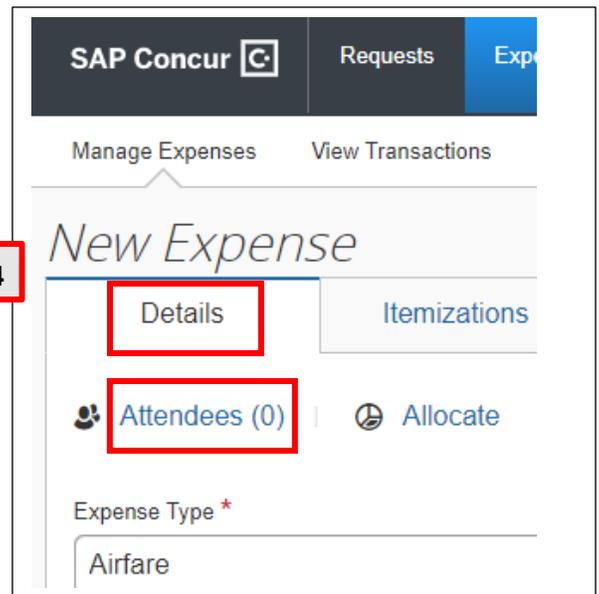
3. When filling in and double checking the required fields for the expenses, please pay close attention to the fields below if they show up as part of an expense.

- a) **Payment Type** drop-down menu:
- (1) If paid by guest, select ***Paid by Guest**
 - (2) If paid by employee, select ***Paid by Employee**
- b) If you see a **Request** drop-down menu, select the estimate from your request.

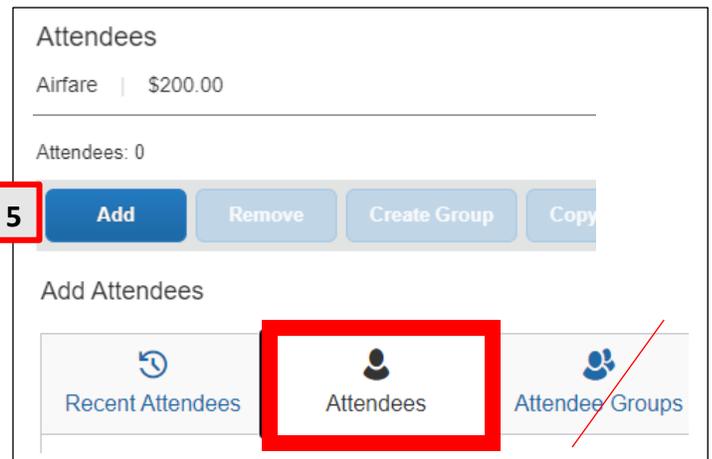


4. The next step: Add the Group to the expense.

Under the **Details** tab, click on the **Attendees** link.



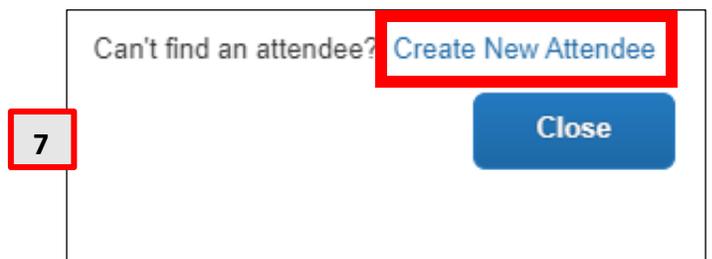
5. Click **Add**, then click the **Attendees** tab. (Do not click “Attendee Groups” as that is a different feature.)



6. In the **Attendee Type** drop-down menu, select **Group of Attendees**.

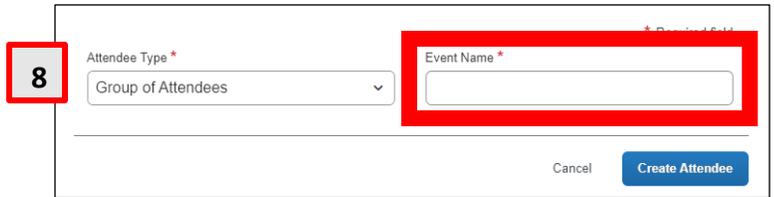


7. Click the **Create New Attendee** link on the right-hand side.

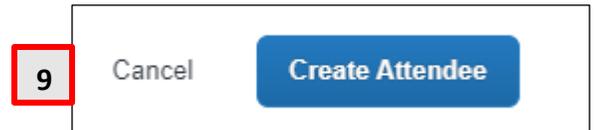


8. Fill in, or check, the required fields listed below:

- **Attendee Type** – Should already be filled with **Group of Attendees**
- **Event Name** – Create a specific name for this Event that will be memorable in the future.

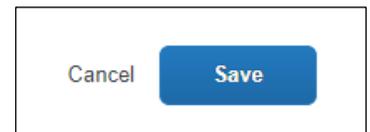


9. Click **Create Attendee** then close out of this pop-up window.



10. Before you save, you will have to fill in the number of people in the Group of Attendees. In the **Attendee Count** column/field, add the number of people in the group **NOT** including yourself.

- In the example shown, the number of people is 59, excluding yourself.
- Click **Save**.



11. You should now see a “(60)” to the right of the **Attendees** link. (Yourself + # of people in Group).

- If the expense is complete, click **Save Expense**.

