

Concur Systemwide Instance User Guide

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HOSPITALITY JUSTIFICATION FORM REQUEST

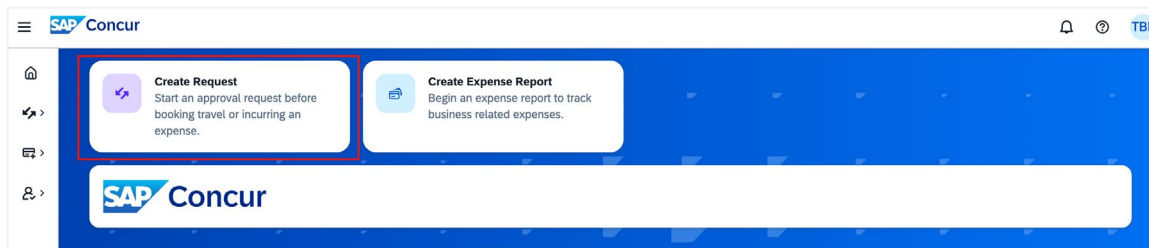
Creating a Hospitality Justification Form Request

Before completing a hospitality justification form, review and ensure you understand the [CSU Hospitality Policy](#). If your hospitality expense(s) will be paid via a university credit card or out-of-pocket and submitted for reconciliation or reimbursement in Concur, then the hospitality justification form should be completed in Concur. If your hospitality expense(s) will be paid through CSU Buy via purchase order, then the hospitality justification form should be completed in CSU Buy. For questions or additional guidance, reach out to your university Finance or Procurement team.

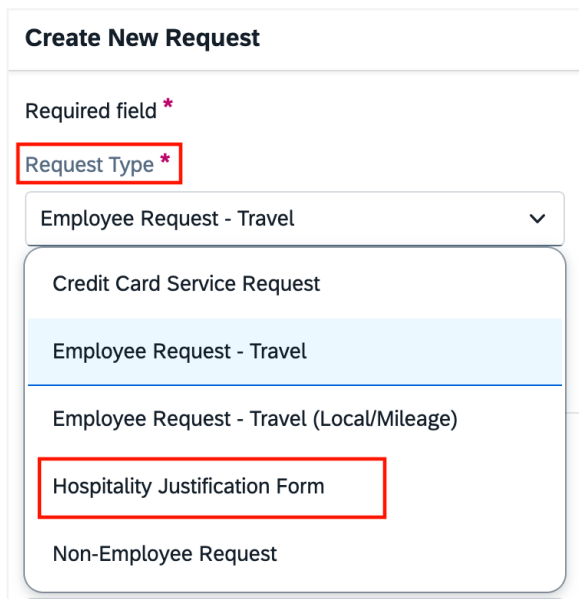
Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur.

Request Header

1. From the **Home** page, click **Create Request**.



2. In the **Create New Request** window, the **Request Header** defaults the **Request Type** to Employee Request – Travel. Click the drop-down in the **Request Type** field and select **Hospitality Justification Form**.



3. The **Request Header** fields for the Hospitality Justification Form display. Complete the Request Header details. All fields identified with an asterisk (*) are required.

4. After completing the fields, click **Create Request**.

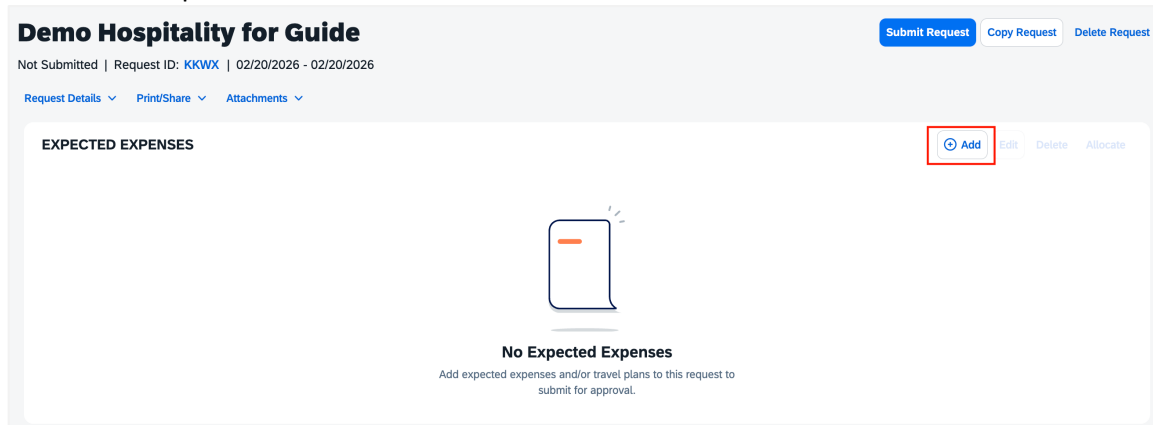
5. To edit the Request Header, select the **Request ID** link or go to **Request Details** → **Edit Request Header**.

Request Header for Hospitality Justification Form: For detailed information on each of the fields, see the field descriptions in the table below.

Field Name	Description
Event Name	Enter the title of the event or program. Your department may implement a standard naming protocol.
Event Start Date	Date event start.
Event End Date	Date event end.
Event Location	City and State where the event will take place.
Event Type	Select the event type that best describes your event.
Chartfield	Chartfield String will pre-populate based on your home department. Business Unit, Fund and Department are required. Project, Program and Class are optional. Update as needed.
Description of Event	Enter a detailed description of the event or program.

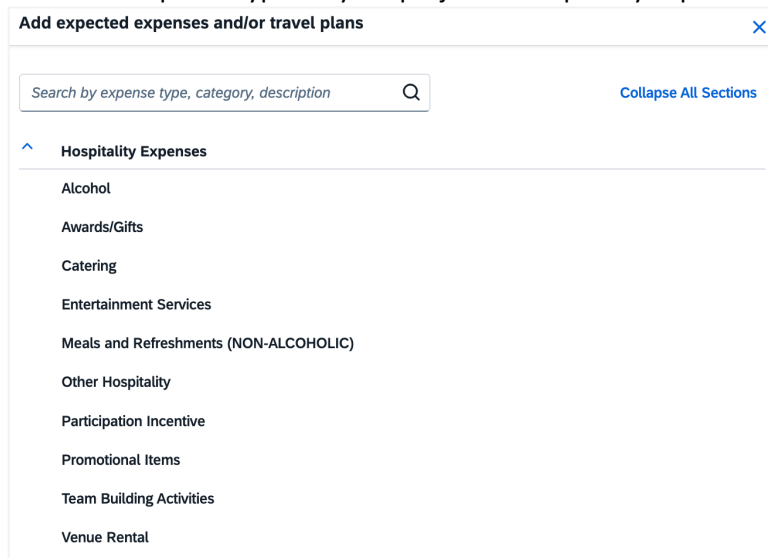
Adding Projected Expenses to Hospitality Justification Form

1. The Expected Expenses screen displays. Click **+Add**. At least one projected expense must be added to submit the Request.



The screenshot shows a web interface for a 'Demo Hospitality for Guide'. At the top right, there are buttons for 'Submit Request', 'Copy Request', and 'Delete Request'. Below the header, there is a status bar indicating 'Not Submitted | Request ID: KKWX | 02/20/2026 - 02/20/2026'. Underneath, there are links for 'Request Details', 'Print/Share', and 'Attachments'. The main content area is titled 'EXPECTED EXPENSES' and contains a large empty box with a central icon of a smartphone with a red bar at the top. Below the icon, the text reads 'No Expected Expenses' and 'Add expected expenses and/or travel plans to this request to submit for approval.' In the top right corner of this section, there are three buttons: 'Add' (highlighted with a red box), 'Edit', and 'Allocate'.

2. Select the expense type for your projected hospitality expense.



The screenshot shows a dialog box titled 'Add expected expenses and/or travel plans'. It features a search bar with the placeholder text 'Search by expense type, category, description' and a magnifying glass icon. To the right of the search bar is a 'Collapse All Sections' link. Below the search bar, the 'Hospitality Expenses' section is expanded, showing a list of expense types: Alcohol, Awards/Gifts, Catering, Entertainment Services, Meals and Refreshments (NON-ALCOHOLIC), Other Hospitality, Participation Incentive, Promotional Items, Team Building Activities, and Venue Rental.

3. The expense form for the selected expense type displays (e.g., Awards/Gifts).

Note: The expense form fields may differ based on the expense type selected.

New Expense: Awards/Gifts

Attendees (0) Allocate

Required field *

Transaction Date *
02/20/2026

Event Type *
Award or Service Recognition

Reason for Gift *
[Empty]

Gift Type *
[Empty]

Vendor Name *
[Empty]

Estimated Amount *
[Empty]

Currency *
US, Dollar (USD)

Comments 0/2000

4. Review and complete all required fields and any optional fields, as desired.

Note: Some expense types will require Attendees be included. See the [Adding Attendees](#) section below for instructions on how to add Attendees.

5. Click **Save**. The **Expected Expenses** screen displays.

Note: Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.

6. Continue to **+Add** expenses until the Request reflects all anticipated hospitality expenses for this event. When all expected expenses have been added, click **Submit Request**.

Demo Hospitality for Guide \$50.00

Not Submitted | Request ID: KKWX | 02/20/2026 - 02/20/2026

Request Details | Print/Share | Attachments

Submit Request Copy Request Delete Request

EXPECTED EXPENSES						
Comment	Expense type	Details	Date	Amount	Requested	
<input type="checkbox"/>	Awards/Gifts Attendees (1)		02/20/2026	\$50.00	\$50.00	
					\$50.00	

7. In the Hospitality Justification Form User Agreement window, review the details and click **Accept & Continue**.

Hospitality Justification Form User Agreement

By clicking 'Accept & Continue', I certify that:

The expense estimate(s) provided is(are) accurate, pertains to official CSU business, and complies with all applicable CSU and University policies and procedures.

CSU Hospitality Policy: [Add Link]

Cancel Accept & Continue

8. The Request is displayed in the Request library.



9. If your university requires approval of Hospitality Justification Form, this Request will route for approval. To review the approval flow, see the [Request Timeline](#) section below for instructions.

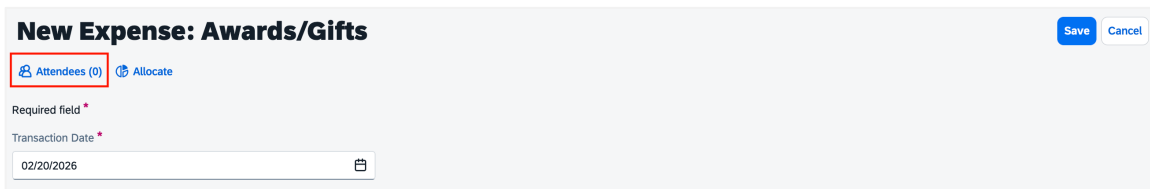
If your university does not require approval of Hospitality Justification Form, this Request will auto approve after submission.

Note: Per policy, Requests that include Promotional Items will route to the University’s Marketing Department for review and approval of the Hospitality Justification Form.

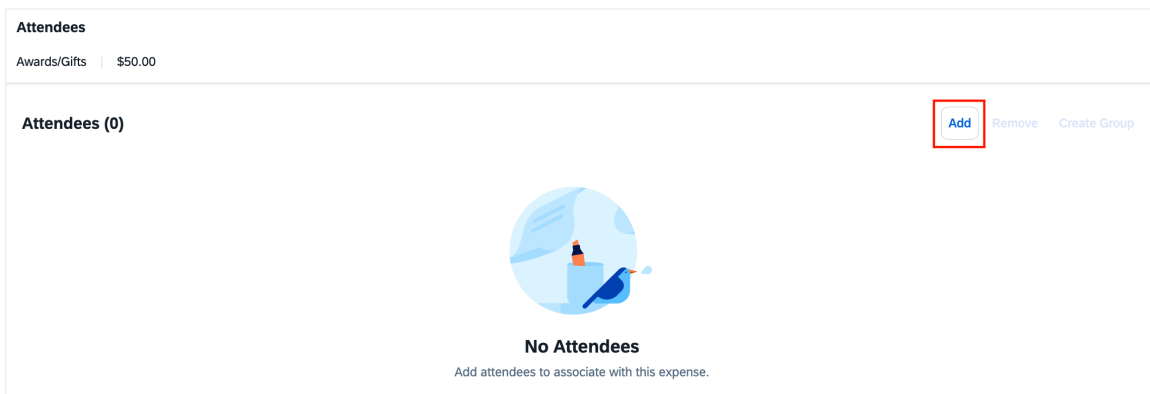
Adding Attendees

Certain expense types (e.g., awards/gifts, catering, meals/refreshments, team building activities) require Attendees be included.

1. After the required fields in the expense form have been completed, select **Attendees**.



2. In the Attendees window, click **Add**.



3. In the **Add Attendees** window, there are multiple options (tabs across the top) to search and/or create new attendees.
 - a. **Attendees** – search for attendees including Faculty/Staff that are part of the Concur solution or previously used attendees
 - b. **Recent Attendees** – up to five of your most recently used attendees
 - c. **Attendee Groups** – your saved Favorites or attendee groups that have been used

d. **Import Attendees** – import up to 500 attendees using the Concur provide import template

4. For this example, select the **Attendee Type = School Guest** from the drop-down menu and click **Create New Attendee**.

Add Attendees

[Attendees](#) [Recent Attendees](#) [Attendee Groups](#) [Import Attendees](#)

Search Criteria

Attendee Type *
School Guest

Last Name

First Name

Affiliation

Reset Search

Create New Attendee

Attendees

Added attendees will be listed here

5. In the **Create New Attendee** window, enter the attendee details in the required fields.

Create New Attendee

Attendee Type *
School Guest

Last Name *

First Name *

Affiliation *

Create Attendee Cancel

6. Click **Create Attendee**.

7. A green banner will indicate that the attendee was created and added to this expense. If additional attendees need to be created, complete the details for the next attendee. Else, if no additional attendees need to be created, click **Cancel**.

Create New Attendee

Attendee added: Joe Smith

Attendee Type *
School Guest

Last Name *

First Name *

Affiliation *

Create Attendee **Cancel**

8. The new attendee displays in the **Attendees** window. Click **Save** to return to the expense form.

Attendees
Awards/Gifts | \$50.00

Attendees (1) Add Remove Create Group

<input type="checkbox"/>	Attendee Type↓↑	Attendee Name↑≡	Last Name↓↑	First Name↓↑	Company↓↑	Amount↓↑	
<input type="checkbox"/>	School Guest	Joe Smith	Smith	Joe		\$50.00	...

Save Cancel

9. The attendee is added to the expense form. Click **Save** to return to the Expected Expenses page.

Awards/Gifts \$50.00 Save Delete Cancel

02/20/2026

Attendees (1) Allocate

Required field *

Transaction Date *

02/20/2026

Allocating Expenses

The **Allocate** feature can be used to designate different chart fields for expenses if there is a need to split the funding of a transaction or charge it to a chart field other than the one at the Header level.

1. After the required fields in the expense form have been completed, select **Allocate**.

Promotional Items \$1,000.00 Save Delete Cancel

02/20/2026

Allocate

Required field *

Transaction Date *

02/20/2026

2. In the **Allocate** window, click **+Add**.

Allocate
Expenses: 1 | \$1,000.00

Percent Amount

Amount: \$1,000.00 | Allocated \$1,000.00 (100%) | Remaining \$0.00 (0%)

Default Allocation

Code: **COC SU-48501-1005** | Percent %: **100**

Allocations (0) Add Edit Remove Save as Favorite

3. In the **Add Allocation** window, select the desired chart field string in the order the segments are presented. The valid values of a segment are dependent on the value of the prior segment and thus must be selected in order. Only chart fields with an asterisk (*) are required.

- Select the **Business Unit (BU)**. If your university has interunit functionality enabled for expense and there are auxiliary BUs supported in Concur, those BUs will be available in this segment.
- Select **Fund**.
- Select **Department**.
- Select **Program, Project, Class**, if needed.

Add Allocation

[+ New Allocation](#) [★ Favorite Allocations](#)

Required field *

Business Unit * 2

(COCSU) CSU Office of the Chancellor

Fund * 3

(485SW) Systemwide Fund

Department * 4

(1010) CO Support Services

Project 5

Save Cancel

- Click **Save** to add the allocation.
- From the **Allocate** window, add additional allocations as desired. The distribution defaults to **Percent %**, but can be distributed by amount by selecting **Amount** in the upper left. If a percentage or amount of the distribution needs to include the original **Default Allocation**, adjust the **Percent %** or **Amount** of each added allocation to desired value.

Allocate

Expenses: 1 | \$1,000.00

Percent **Amount**

Amount: \$1,000.00 Allocated \$1,000.00 (100%) Remaining \$0.00 (0%)

Default Allocation

Code: **COCSU-48501-1005** Percent %: 0

Allocations (2) [Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

<input type="checkbox"/>	Business Unit	Fund	Department	Project	Program	Class	Code	Percent %
<input type="checkbox"/>	CSU Office of the Chancellor	Systemwide Fund	CO Support Services				COCSU-485SW-1010	50
<input type="checkbox"/>	CSU Foundation	Academic & Student Affairs	Professional and Continuing Ed				COFDN-95Q09-1049	50

Save Cancel

- When the split of the allocation is complete, click **Save**.

Allocate

Expenses: 1 | \$1,000.00

Amount: \$1,000.00 | Allocated \$1,000.00 (100%) | Remaining \$0.00 (0%)

34

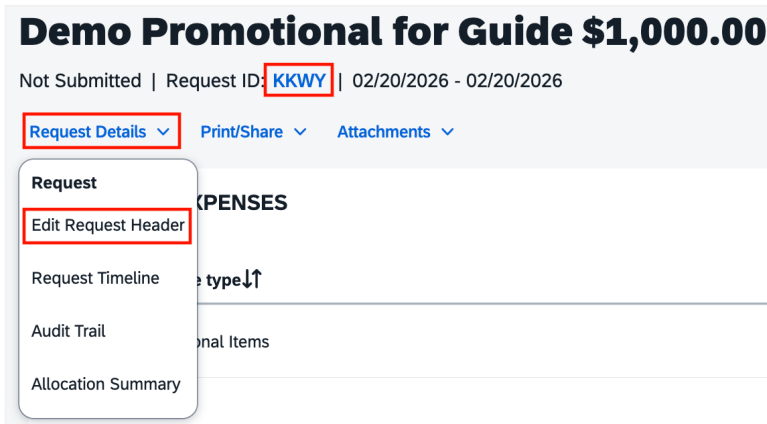
Code: **COCSU-48501-1005**

Allocations (2)

<input type="checkbox"/>	Business Unit↓↑	Fund↓↑	Department↓↑	Project↓↑	Program↓↑	Class↓↑	Code↑≡	<input type="text" value="Percent %"/>	<input type="text" value="..."/>
<input type="checkbox"/>	CSU Office of the Chancellor	Systemwide Fund	CO Support Services				COCSU-485SW-1010	<input type="text" value="33"/>	<input type="text" value="..."/>
<input type="checkbox"/>	CSU Foundation	Academic & Student Affairs	Professional and Continuing Ed				COFDN-95Q09-1049	<input type="text" value="33"/>	<input type="text" value="..."/>

Edit Request Header

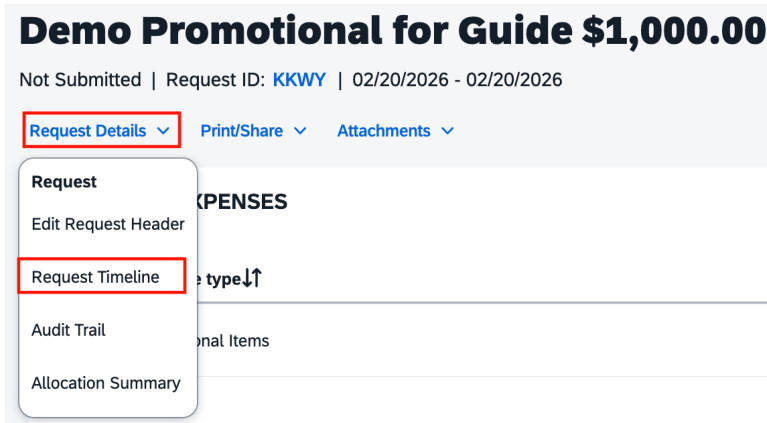
- 1. Select **Request Details** → **Edit Request Header** or select the Request ID.



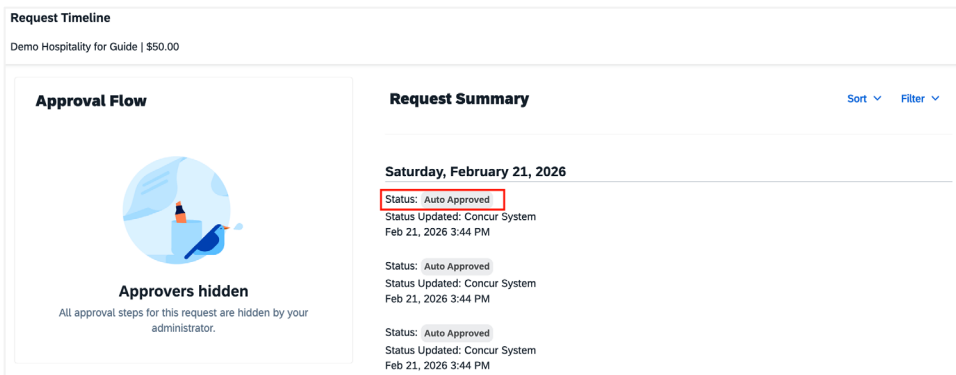
View Request Timeline

The timeline displays the approval workflow and identifies the steps which have been completed or are outstanding.

- 1. Select **Request Details** → **Request Timeline**.



- a. In the example below, the university does not require approval of Hospitality Justification Forms so the Request was auto approved.



- b. In the example below, a promotional item was added to the Hospitality Justification Form and thus requires Marketing Approval.

Request Timeline

Demo Promotional for Guide | \$1,000.00

Approval Flow [Edit](#)

Marketing Approval

Marketing Approver

Audit Trail

The audit trail will display the timestamp of certain actions taken on the request.

1. Select **Request Details** → **Audit Trail**.
2. The date/time of the approvals and the approver names will display.

Request Level			
Date/Time↓↑	Updated By↓↑	Action↓↑	Description↓↑
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending Request Processor Review to Auto Approved Comment: Skips the step if BU does not require approvals for Hospitality Justification Form Step Name: Request Processor Review
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending COFDN Approval to Auto Approved Comment: Skipping as not allocated to COFDN Step Name: COFDN Approver
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending Marketing Approval to Auto Approved Comment: Skipping as No Promotional Items Step Name: Marketing Approval
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending Direct Supervisor Approval to Auto Approved Comment: Skip step if BU does not require Hospitality Justification Form approval or if they do they require Financial/FOA approval after Direct Supervisor. Step Name: Direct Supervisor 2
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending Cost Object Approval to Auto Approved Comment: Skip Step if pre-approval is not required by University/BU Step Name: Financial/DOA Approval
02/21/2026 1:44 PM	Concur System	Approval Status Change	Status changed from Pending Direct Supervisor Approval to Auto Approved Comment: Skip step if BU does not require Hospitality Justification Form approval or if they do they require Financial/FOA approval first in approval workflow. Step Name: Direct Supervisor 1
02/21/2026 1:44 PM	Test Beth Forster	Approval Status Change	Status changed from Submitted to Pending Direct Supervisor Approval Comment: Step Name:

[Close](#)

Allocation Summary

If a line has an allocation, the **Allocation Summary** displays a summary of any chart field splits that might have been added to the request expenses.

1. Select **Request Details** → **Allocation Summary**

Allocation Summary	
Demo Promotional for Guide	\$1,000.00
The sum of allocation amounts may not exactly match the expense amount due to rounding.	
Code↓↑	Amount↓≡
COCSU-48501-1005	\$340.00
CSU Office of the Chancellor - CSU OPERATING-GENERAL SUPPORT - CO Accounts Payable	
COFDN-95Q09-1049	\$330.00
CSU Foundation - Academic & Student Affairs - Professional and Continuing Ed	
COCSU-485SW-1010	\$330.00
CSU Office of the Chancellor - Systemwide Fund - CO Support Services	
Close	

Print/Share

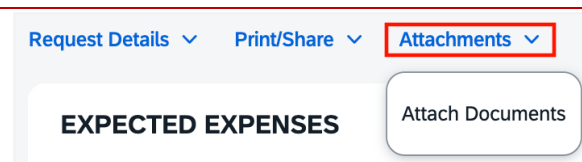
From the **Print/Share** menu, select the ***CSU-Hospitality Request Printed Report** option to save the hospitality justification form as a PDF.

Note: This will be a required step if the hospitality expense is paid via ProCard. The PDF of the hospitality justification form must be added to the ProCard transaction where this expense is paid.

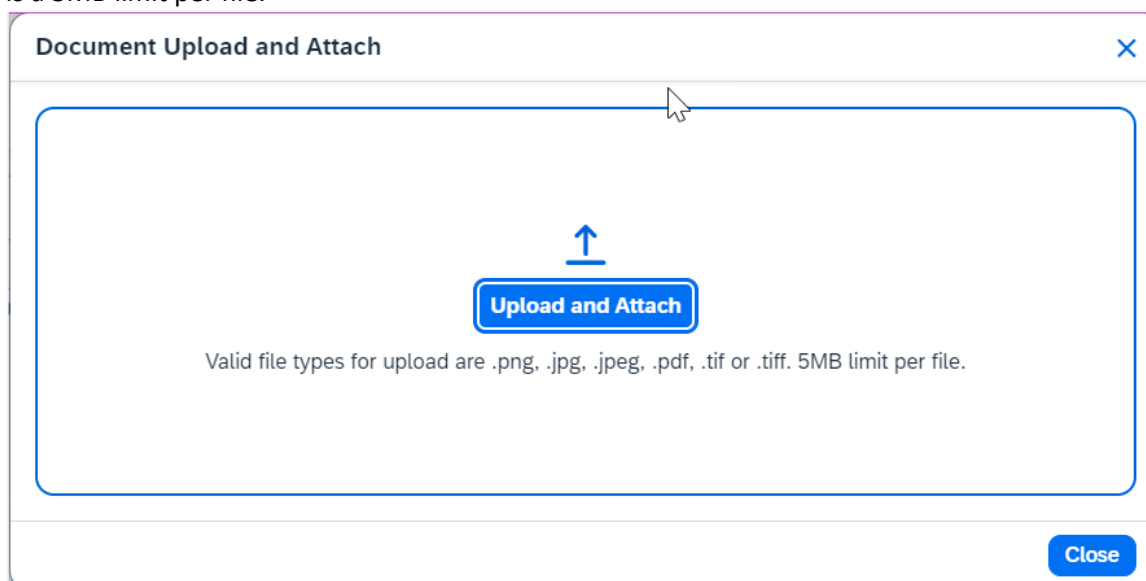


Attachments

The **Attachments → Attach Documents** menu option launches the **Document Upload and Attach** window to browse then **Upload and Attach** files that support the request



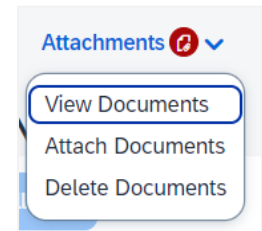
1. Valid file types are specified in the window and are pdfs or image files (.png, .jpg or .jpeg, .tif, etc). There is a 5MB limit per file.



2. Click **Close** once files have been uploaded.

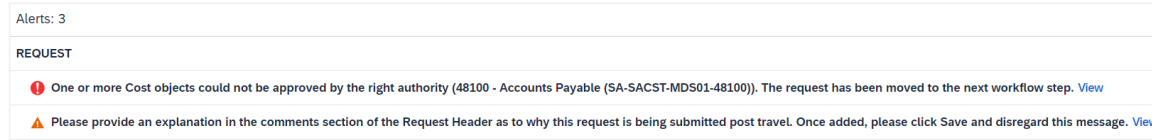
- Once documents have been uploaded, the Attachments menu displays a small red image to identify that the Request has document attachments. The menu changes to have three options – View Documents, Attach Documents and Delete Documents which can be used to update or remove previously uploaded attachments.

Note: Documents cannot be removed once the Request is submitted or Approved, however, documents can be added at any time.



Alert Types

Alerts are messages triggered by certain criteria in your Request. There are different types of alerts.



- ERROR:** If an alert displays in **red**, it is displaying an error. This means an action must be taken before the Request can be submitted.
- WARNING:** An orange alert displays communication related to your Request components advising you to read and take action.

Note: Most orange warnings will not clear, however, they will not prevent the user from submitting the Request.

EXPENSE REPORTS

Creating an Expense Report from an Approved Request

All CSU expense reports with hospitality expense types require an approved Concur hospitality justification form. For the travel and non-travel expense reports, the approved hospitality justification form created under Request must be directly linked/associated with the corresponding Expense Report.

For ProCard statement reports with hospitality expense types, the PDF of the approved Concur hospitality justification form created under Request must be attached. See the [Print/Share](#) section above on how to print the request to PDF. Then, view the [Add Hospitality Justification Form to a ProCard Statement Report](#) details below for instructions.

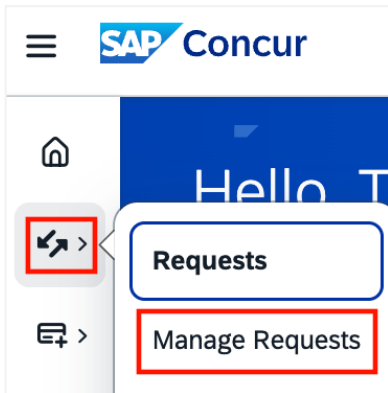
There are three ways to link/associate an approved request to a Travel or Non-Travel expense report:

- [Opening an approved Request and Creating an Expense Report](#)
- [Creating an Expense Report from an approved Request](#)
- [Creating an Expense Report and using Manage Request to link the approved Request](#)

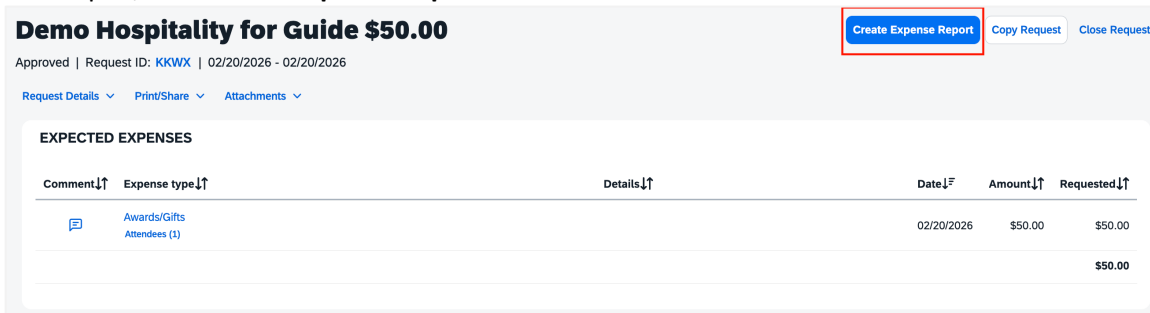
Open an Approved Hospitality Justification Form and Create Expense Report

In this example, open an approved Request and create the Expense Report.

1. From the Home page, select **Requests** → **Manage Requests**



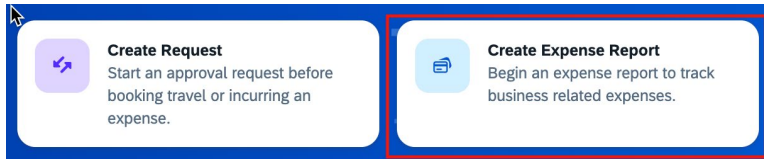
2. Select the approved tile for the Request to be linked/associated to the expense report.
3. Once open, click **Create Expense Report**.



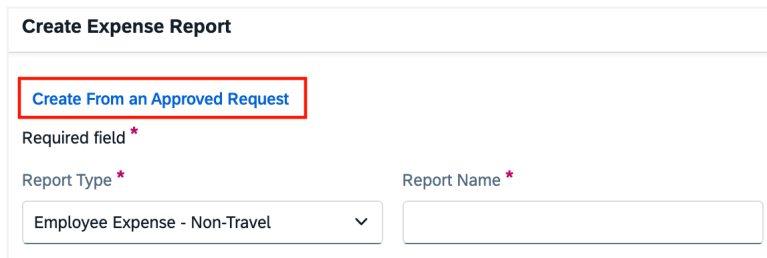
In this next example, create the Expense Report from an approved Request.

Create an Expense Report from an Approved Hospitality Justification Form

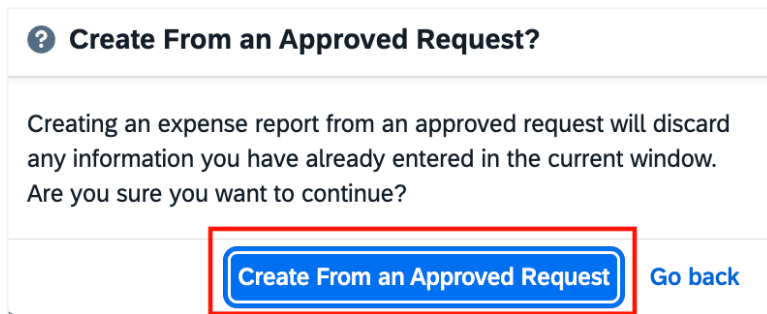
1. From the Home menu, click **Create Expense Report**.



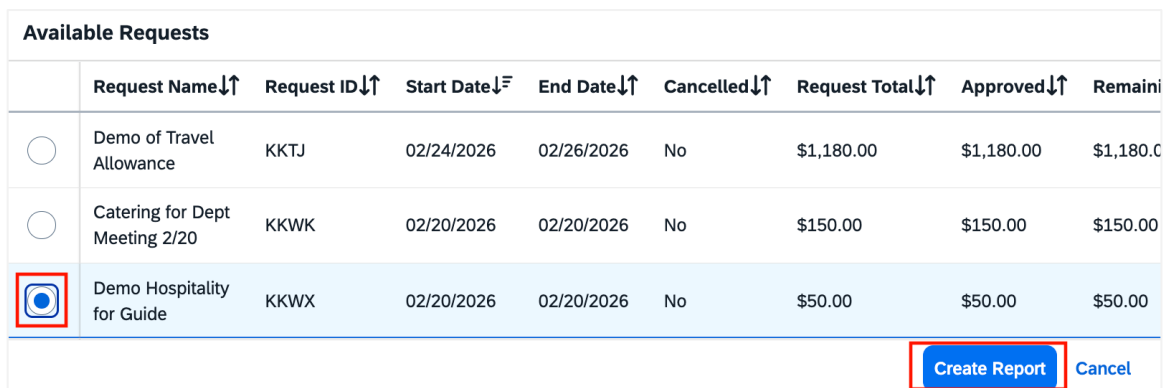
2. Select **Create From an Approved Request**.

A screenshot of a form titled 'Create Expense Report'. At the top, there is a button labeled 'Create From an Approved Request' which is highlighted with a red rectangular box. Below this, there is a 'Required field *' label. Underneath, there are two input fields: 'Report Type *' with a dropdown menu currently showing 'Employee Expense - Non-Travel', and 'Report Name *' with an empty text box.

3. In the pop-up window, confirm **Create From an Approved Request**.

A screenshot of a confirmation dialog box titled 'Create From an Approved Request?'. The text inside reads: 'Creating an expense report from an approved request will discard any information you have already entered in the current window. Are you sure you want to continue?'. At the bottom of the dialog, there are two buttons: 'Create From an Approved Request' (highlighted with a red rectangular box) and 'Go back'.

4. In the **Available Requests** window, select the desired request and click **Create Report**.

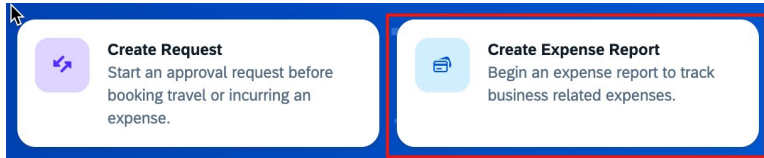


Available Requests								
	Request Name↓↑	Request ID↓↑	Start Date↓↑	End Date↓↑	Cancelled↓↑	Request Total↓↑	Approved↓↑	Remaini
<input type="radio"/>	Demo of Travel Allowance	KKTJ	02/24/2026	02/26/2026	No	\$1,180.00	\$1,180.00	\$1,180.00
<input type="radio"/>	Catering for Dept Meeting 2/20	KKWK	02/20/2026	02/20/2026	No	\$150.00	\$150.00	\$150.00
<input checked="" type="radio"/>	Demo Hospitality for Guide	KKWX	02/20/2026	02/20/2026	No	\$50.00	\$50.00	\$50.00

In this next example, create the Expense Report and then link the approved Request.

Create an Expense Report and Link an Approved Hospitality Justification Form

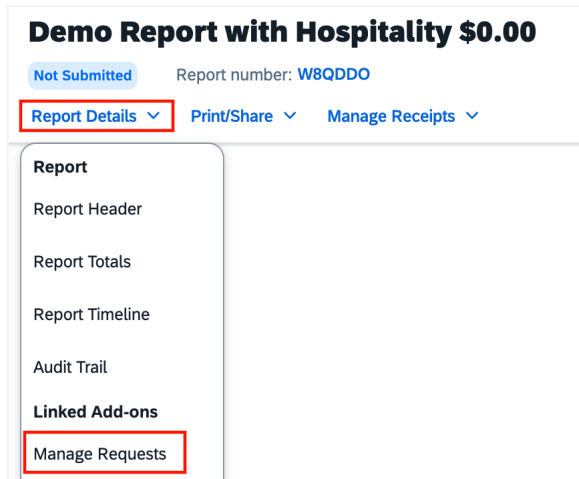
1. From the Home menu, click **Create Expense Report**.



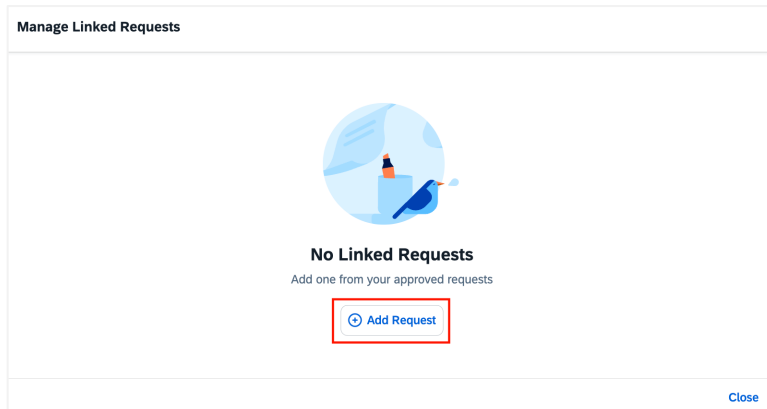
2. In the **Create Expense Report** window, select the **Report Type** (e.g., Employee Expense - Non-Travel for a hospitality expense), complete the required fields in the Report Header and click **Create Report**.

Note: At any point before or after adding expenses to this expense report, the approved request can be added (e.g., for hospitality expenses, an approved hospitality justification form must be linked).

3. Select **Report Details** → **Manage Requests**.



4. In the **Manage Linked Requests** window, click **+Add Request**.



5. In the **Add Request** window, select the desired request and click **Add to Report**.

[Add Request](#)

Available Requests (11)

<input type="checkbox"/>	Request Name↓↑	Request ID↓↑	Start Date↓↑	End Date↓↑	Cancelled↓↑	Request Total↓↑	Approved↓↑	Rer
<input type="checkbox"/>	Catering for Dept Meeting 2/20	KKWK	02/20/2026	02/20/2026	No	\$150.00	\$150.00	\$15
<input checked="" type="checkbox"/>	Demo Hospitality for Guide	KKWX	02/20/2026	02/20/2026	No	\$50.00	\$50.00	\$50
<input type="checkbox"/>	Award Lunch for Sarah Smith	KKTT	02/19/2026	02/19/2026	No	\$250.00	\$250.00	\$25
<input type="checkbox"/>	Catering for Award Meeting	KKTK	02/18/2026	02/18/2026	No	\$250.00	\$250.00	\$25
<input type="checkbox"/>	BF Hospitality Form	KKN9	02/09/2026	02/09/2026	No	\$400.00	\$400.00	\$40

[Add To Report](#)

6. Determine whether to **Update Other Items** on this expense report using the details from the request. Click **Update** or **Do Not Update** as desired.

If there are many other transactions already in the report that are not associated with the Request, consider selecting **Do Not Update**. If all of the transactions are related to the Request, consider selecting **Update**.

Update Other Items?

Linking a request will modify the following fields:

- Request/Trip Name
- Travel Start Date
- Travel End Date
- *Business Unit
- *Fund
- *Department
- *Project
- *Program
- *Class

Do you want to also update your expenses, itemizations, and allocations in this report with the same changes?

[Update](#) [Do Not Update](#)

7. Once the Request is linked, click **Close** to return to the report.

Manage Linked Requests

Linked Requests (1) [+ Add Request](#)

Request Name↓↑	Request ID↓↑	Cancelled↓↑	Request Total↓↑	Approved↓↑	Remaining↓↑	
Demo Hospitality for Guide	KKWX	No	\$50.00	\$50.00	\$50.00	Remove

[Close](#)

8. The Request is linked.

The screenshot shows the header of a ProCard Statement Report. At the top, it says "Demo Report with Hospitality \$0.00". Below this, there is a status "Not Submitted" and "Report number: W8QDDO". To the right, there is a "Requests: 1" icon with a checkmark and "\$50.00 Approved" below it. At the bottom, there are three menu items: "Report Details", "Print/Share", and "Manage Receipts".

In this next example, create add a Hospitality Justification Form to a ProCard Statement Report.

Add Hospitality Justification Form to a ProCard Statement Report

The way hospitality justification forms are linked / associated with a ProCard Statement Report is different than the Travel and Non-Travel Expense Report.

1. From the approved Hospitality Justification Form, select [Print/Share](#) to save the request as a PDF.
2. In the ProCard Statement Report, when a hospitality expense is reconciled, attach the PDF copy of the related hospitality justification form. See the [Attachment](#) section above for details.

Report Header

All the header details from the Request are brought to the expense report header. If you need to edit the details, including the **Report Name**, select the link for the **Report Number** or go to **Report Details** → **Report Header**.

The screenshot shows the header of a ProCard Statement Report. At the top, it says "Demo Hospitality for Guide \$50.00". Below this, there is a status "Not Submitted" and "Report number: TLSO9B". To the right, there is a "Requests: 1" icon with a checkmark and "\$50.00 Approved" below it. At the bottom, there are three menu items: "Report Details", "Print/Share", and "Manage Receipts". A sidebar menu is open on the left, showing "Report", "Report Header", "Report Totals", and "Report Timeline". The "Report Header" item is highlighted with a red box. The main content area shows a dropdown menu set to "Standard", a "Date" field with a downward arrow, and a "Comment" field.