



# Concur Travel and Expense Management: **Overview**

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Welcome to our training on Concur Travel and Expense Management.

## Project Steering Committee

- **Ethan Erickson**, Vice President for Administration and Finance
- **Fran Willbrant**, Associate Vice President, Financial Services
- **Chad Currier**, Interim Chief Technology Officer
- **Joe Mocnick**, Dean, Hale Library
- **Grant Chapman**, Associate Provost, International Programs
- **Geneva Jahnke**, Budget/Fiscal Officer, College of Ag/K-State Research & Extension
- **Michael James**, Executive Director, Admin & Finance Salina
- **Christopher Jones**, Interim Department Head, Civil Engineering
- **Michael Raine**, Information Technology Manager, College of Business

## Project Implementation Team

- **Memory Buffington**, Assistant Vice President, University & Shared Services Accounting
- **Britt McLaughlin**, Director of Financial Operations
- **Christa Beemer**, Training Coordinator and Functional Systems Manager
- **Aaron Stroot**, Director of Systems & Fund Balancing
- **Ed Puckett**, Enterprise Senior IT Project Manager
- **Stacy Divine**, IT Business Analyst
- **Paulette Arnold**, IT Administrator
- **Matt Fuller**, Assistant Director of ERP Systems
- **Nick Zimmermann**, Business Analyst II
- **Keoni Messer**, Functional Systems Analyst

I'd like to start by acknowledging the Project Steering Committee and Implementation Team...



## Today's Session:

- Announcements
- Concur Overview
- Supervisor/Department Head Responsibilities
- Business Liaison Responsibilities

Today's session is divided into four main segments: a few announcements, an overview of Concur information that is relevant to everyone, a look at the responsibilities of the supervisor and department head in the Concur approval process, and a summary of the business liaison's responsibilities in the review process. At the end of the session that applies to you, feel free to leave or stay at your convenience.



At various points, we will provide a dedicated time for questions and answers. Please hold your questions until we come to these breaks. To make sure we are respectful of your time and complete the training on time for you, we are limiting the time of these QA sessions. If you have questions that don't get answered today, we have a survey link available on our [concur.k-state](https://concur.k-state.edu) website where you can submit questions. The QR code for that link is posted around the room and on the screen. You can point your phone camera at the code to gain access to the link as well.



# Announcements

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Starting with our announcements,

- **US Bank cards**
  - pick-up
  - UMB transition
  
- **Travel**
  - Concur
  - Anthony Travel

we wanted to remind everyone that new US Bank credit cards are being distributed. We have them available here today for you. You can also pick up your card at 105 Anderson Hall, Monday through Thursday from 8 a.m. to 4 p.m. from February 27-March 31. You'll need to have your photo ID with you to claim your new card. Existing UMB cards will be deactivated upon activation of the new card. And all UMB cards will be deactivated by March 31. All UMB transactions will continue to be expensed and submitted through a BPC voucher in eForms. All transactions for the new U.S. Bank cards will be expensed through Concur. Our second announcement involves travel. Concur is available for booking travel. Anthony Travel, our new travel management company, will provide training on the travel booking process in late March. We will also have a full-time Anthony Travel agent on-site in the Student Union who is available to help book travel. Concur is the only current option to expense and submit travel expenses in our current state. eForms for travel vouchers is not being restored. For those employees who have unreimbursed travel expenses from prior trips, those expenses need to be reported through Concur.

## Key Business Process Changes:

- Business travel booked on a card in traveler's name
- Concur central card available for booking airfare
- Travel requests required for all travel except in-state mileage
- Expenses submitted by category
  - Travel Expense Reports
  - Purchase Card (Non-travel) Expense Reports
  - Non-travel (Out-of-pocket) Expense Reports

A few key business process changes to be aware of:

- a. Employee business travel expenses (except business travel meals) paid by card must be placed on either a university card issued in the traveler's name or the traveler's personal card.
- b. The Concur booking tool includes a central card that may be used to book airfare. Charges placed on this central card are allocated through the traveler's expense report.
- c. All travel except in-state mileage requires a pre-approved travel request, submitted through the Concur travel request process.
- d. Expense reports are submitted in Concur according to the category of expense. For any expenses you incur, you are responsible for submitting the applicable type of report. If you have both travel and non-travel expenditures in a month, you would need to submit expense reports for both types of expenses. The three types of expense reports include
  - i. travel expense reports, containing all expenses associated with a travel event, including both those paid by university credit card and paid out-of-pocket. Travel expense reports replace the eForms travel voucher.
  - ii. purchase card non-travel expense reports. Purchase card (non-travel) expense reports replace the eForms BPC voucher.
  - iii. and non-travel expense reports. These expense reports allow for the reimbursement of funds paid out-of-pocket by the employee. All employee reimbursements are required to be paid through the Concur expense report process.

- **concur.k-state.edu**

- Training
  - videos
  - printable pdfs
- FAQs
- Survey link



- **Concur Collaboration Zoom sessions:**

- February 27-March 31: 8am-noon; 1-5pm (hours may be reduced based on need)
- <https://ksu.zoom.us/j/94653408664> Meeting ID: 946 5340 8664

- **Anthony Travel**

- Training March 26-28
- On-site agent April 1

I'd like to point you to a variety of resources available to you. We have a strong library of support resources for you, including the K-State Concur website with its training videos and printable pdf instruction guides, extensive FAQs, a survey link that allows you to send in Concur questions to our support team—QR code available for quick access to that link—an open Concur Collaboration Zoom session—and for travel booking, the upcoming Anthony Travel trainings and on-site agent. Please reference these resources and reach out with questions.





# Concur Approval Flow

Let's look, then, at Concur itself to understand the practical application of these processes. It's helpful first of all to understand the general way Concur works. Items in Concur flow through an approval process—also called the approval flow or workflow. This workflow varies among different types of requests and reports.

## Travel Requests



For travel requests, the traveler submits the request; it goes to the traveler’s supervisor, then to the business liaison, then to the department head, and finally—if applicable—to a special approver (such as the international approver for international travel or the cash advance administrator for cash advance requests).

## Card Requests

**New Cards/Permanent  
Limit Changes**



**Card Cancellations**



**All Others**

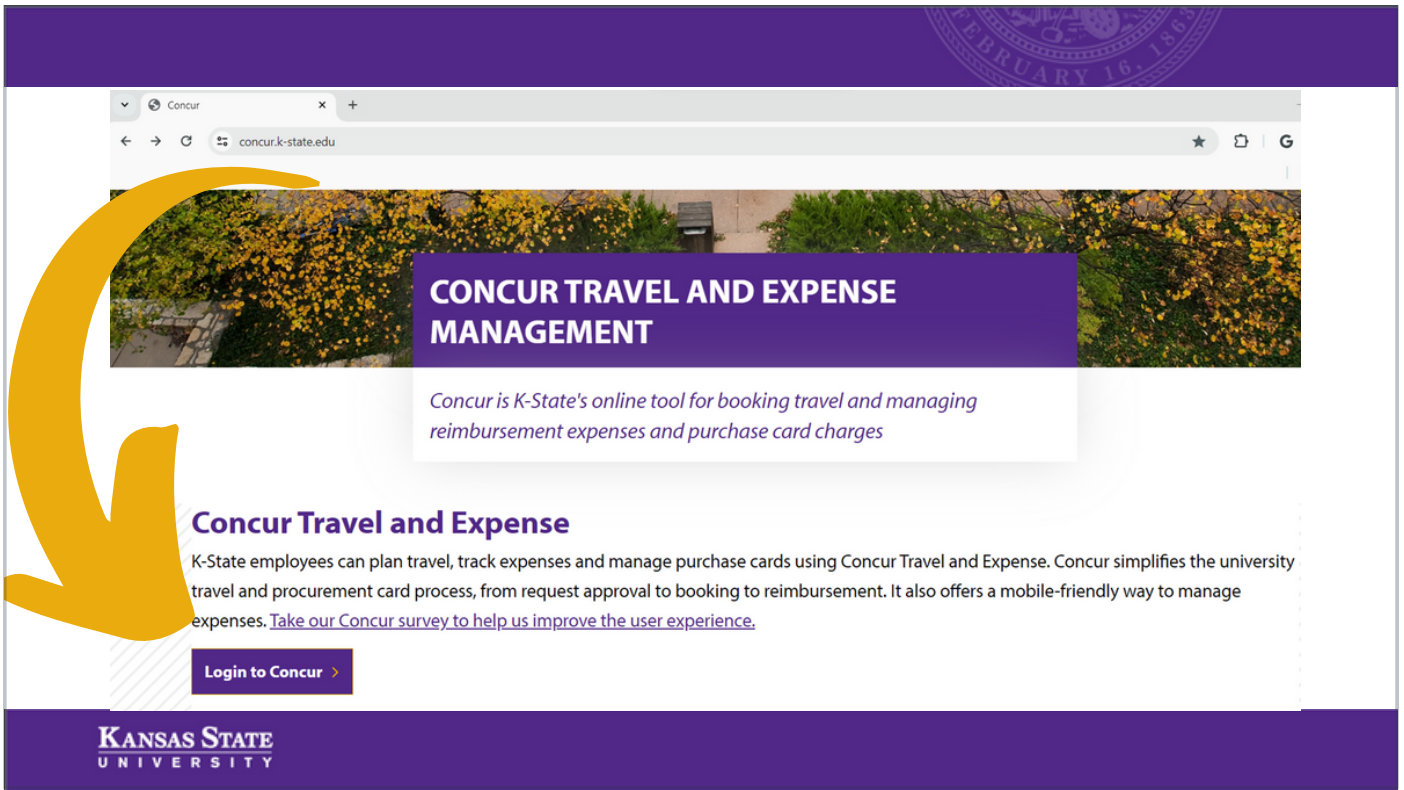


For card requests, for new cards or permanent limit changes, the employee submits the request; it goes to the business liaison, then to the department head, and finally to the card administrator. Card cancellations move from the employee to the business liaison to the card administrator. And all other card requests go from the employee directly to the card administrator.

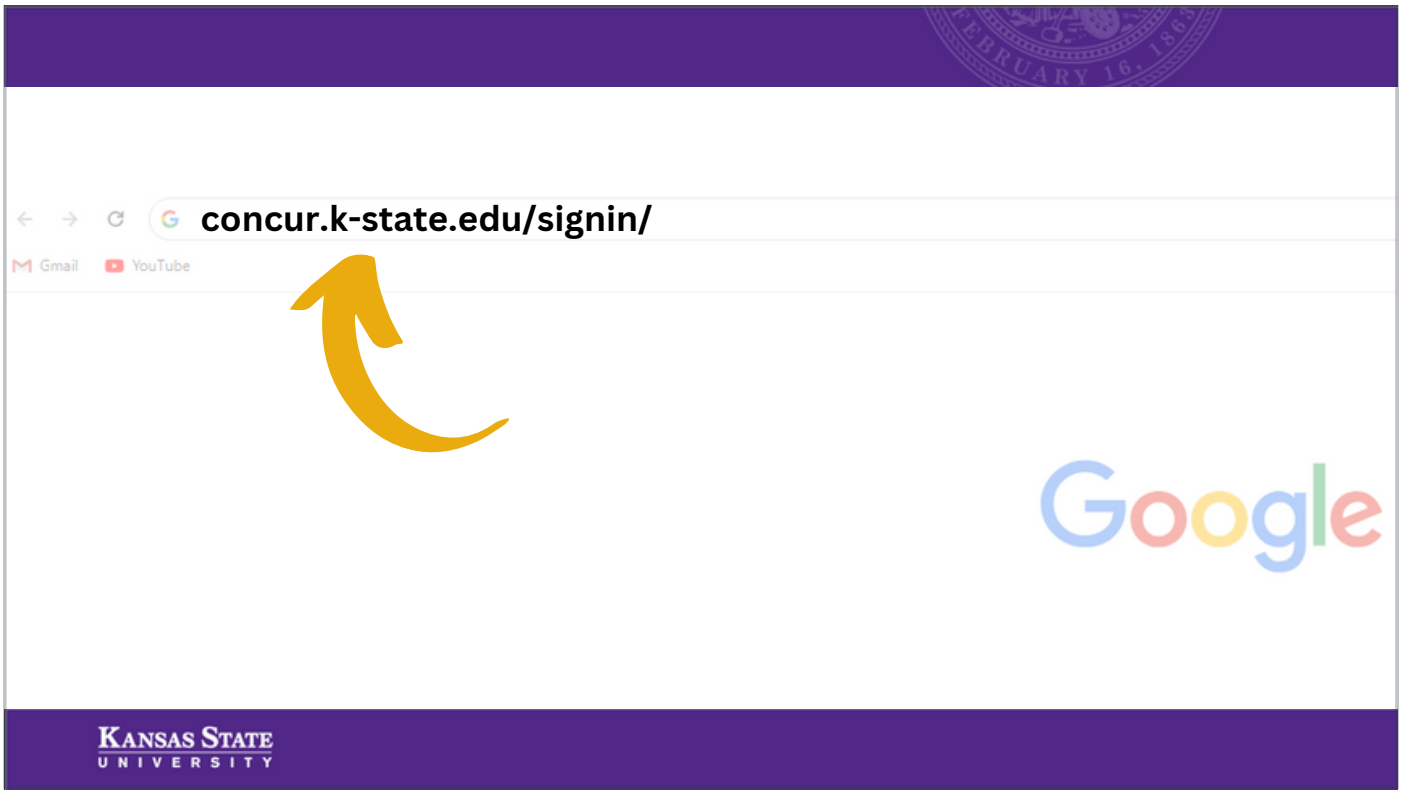
## Expense Reports



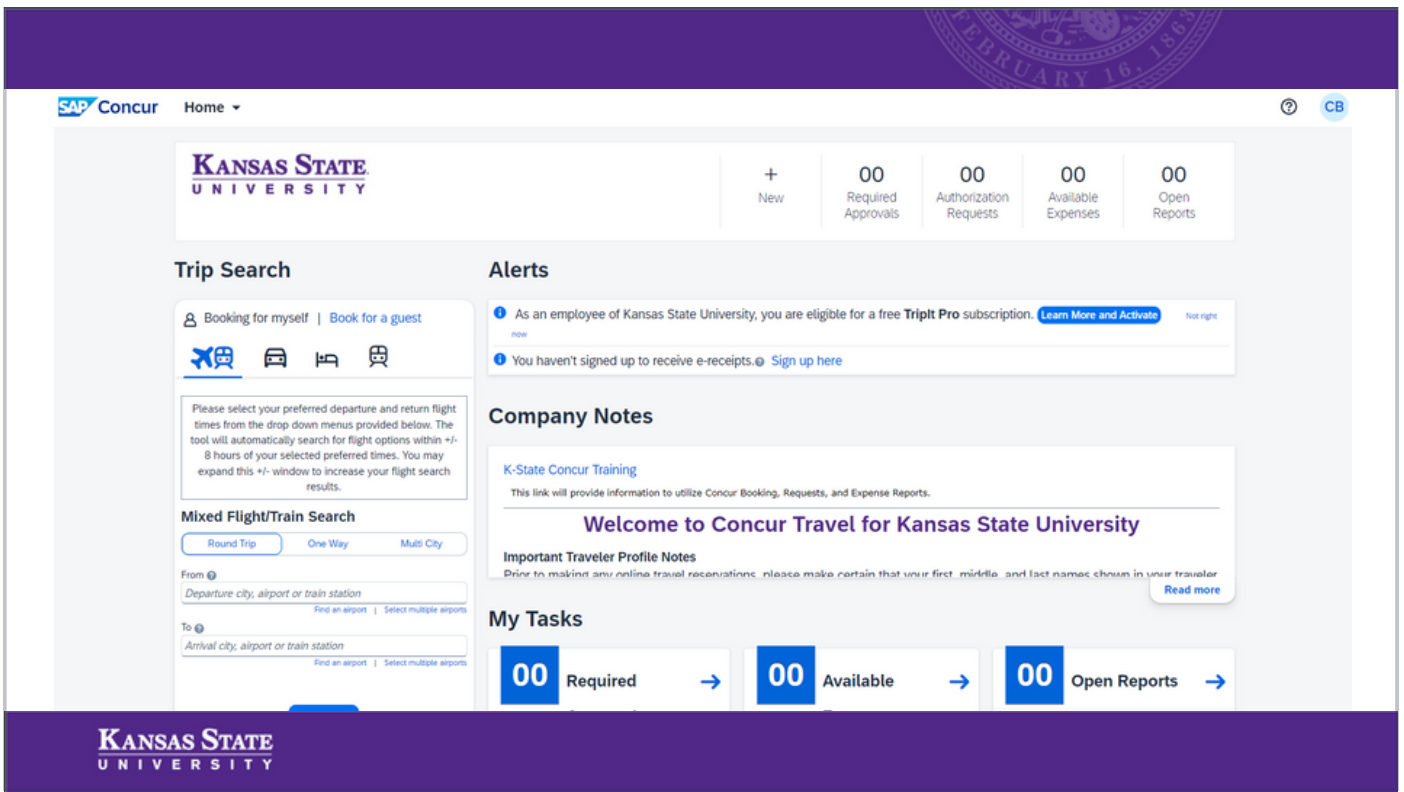
For expense reports—of all types— the employee submits the report; it goes to the business liaison, then to the department head, and finally, if applicable, to the special funding approver for expense reports involving AES or SPA funding.



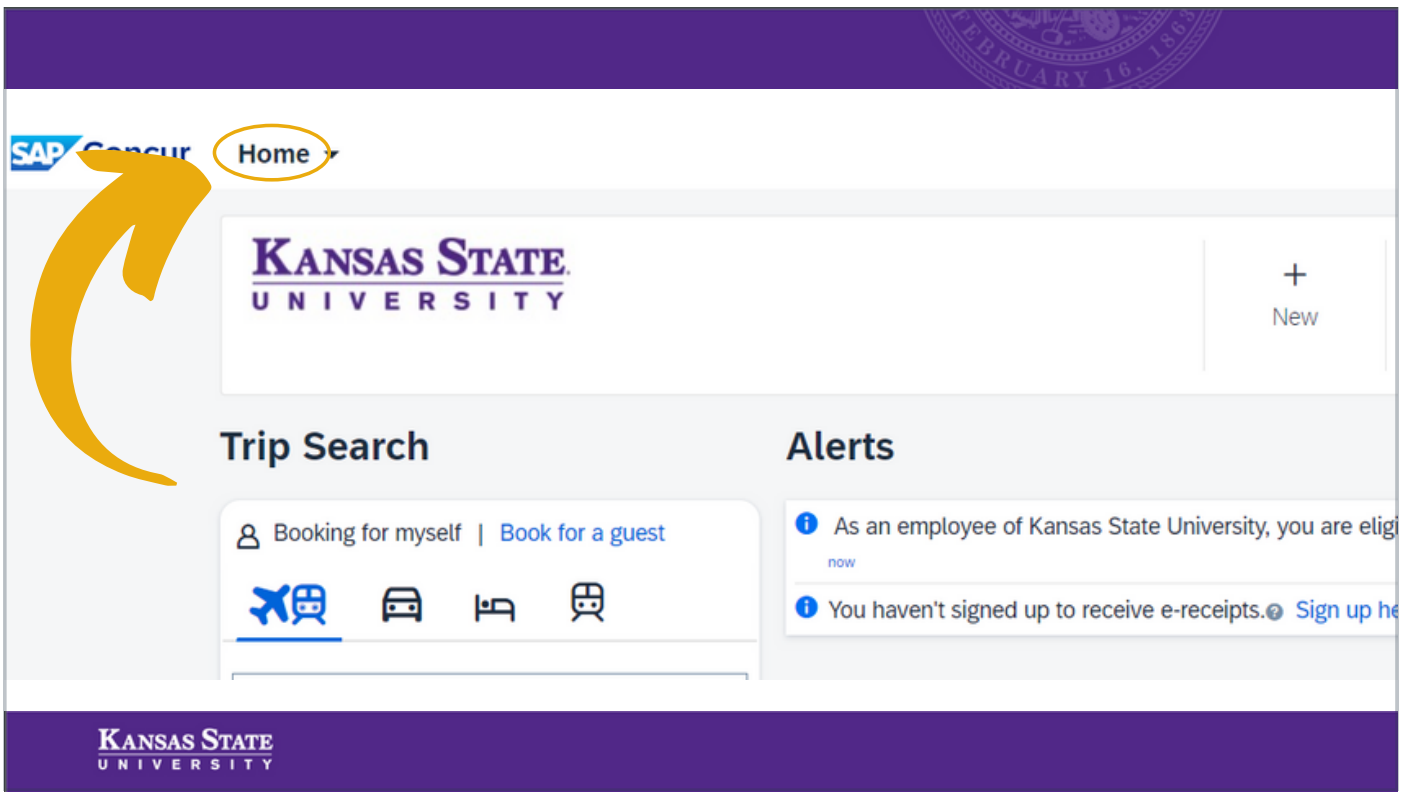
The first step in working in Concur is to log in. There are links to log in via the K-State Concur page,



Or you can enter the sign-in address directly into your web browser. That address is [concur.k-state.edu/signin/](https://concur.k-state.edu/signin/)

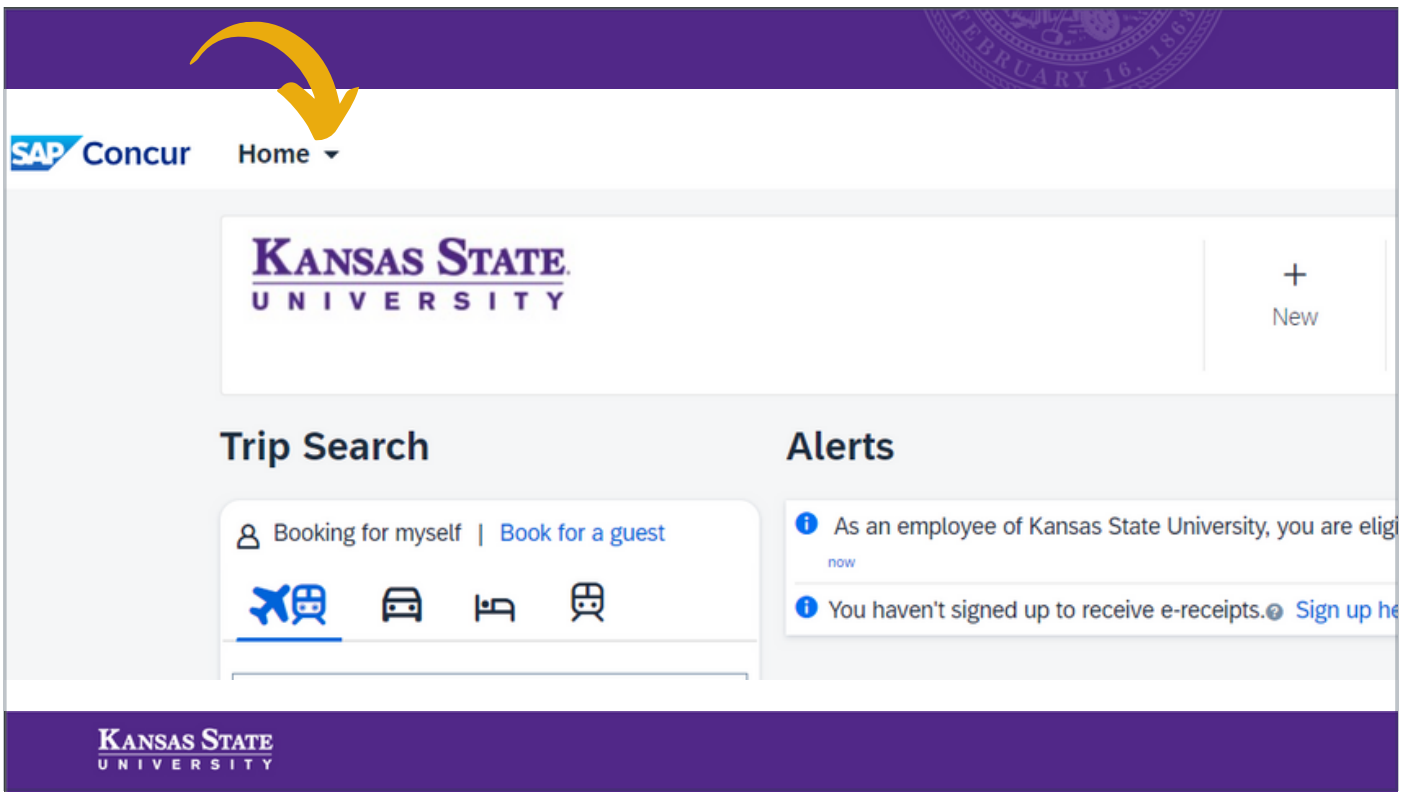


When you log in, you'll first see this screen. This is the Concur dashboard,

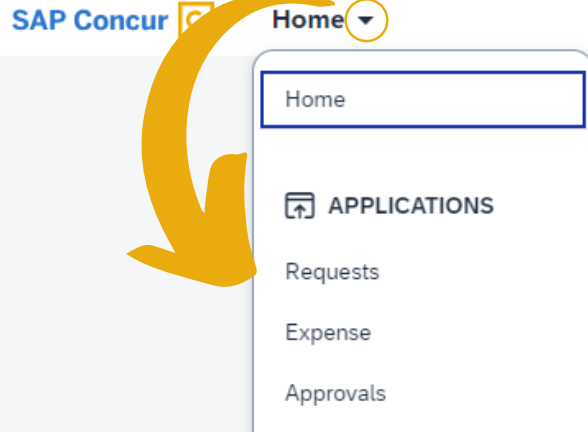


also called the Home page.

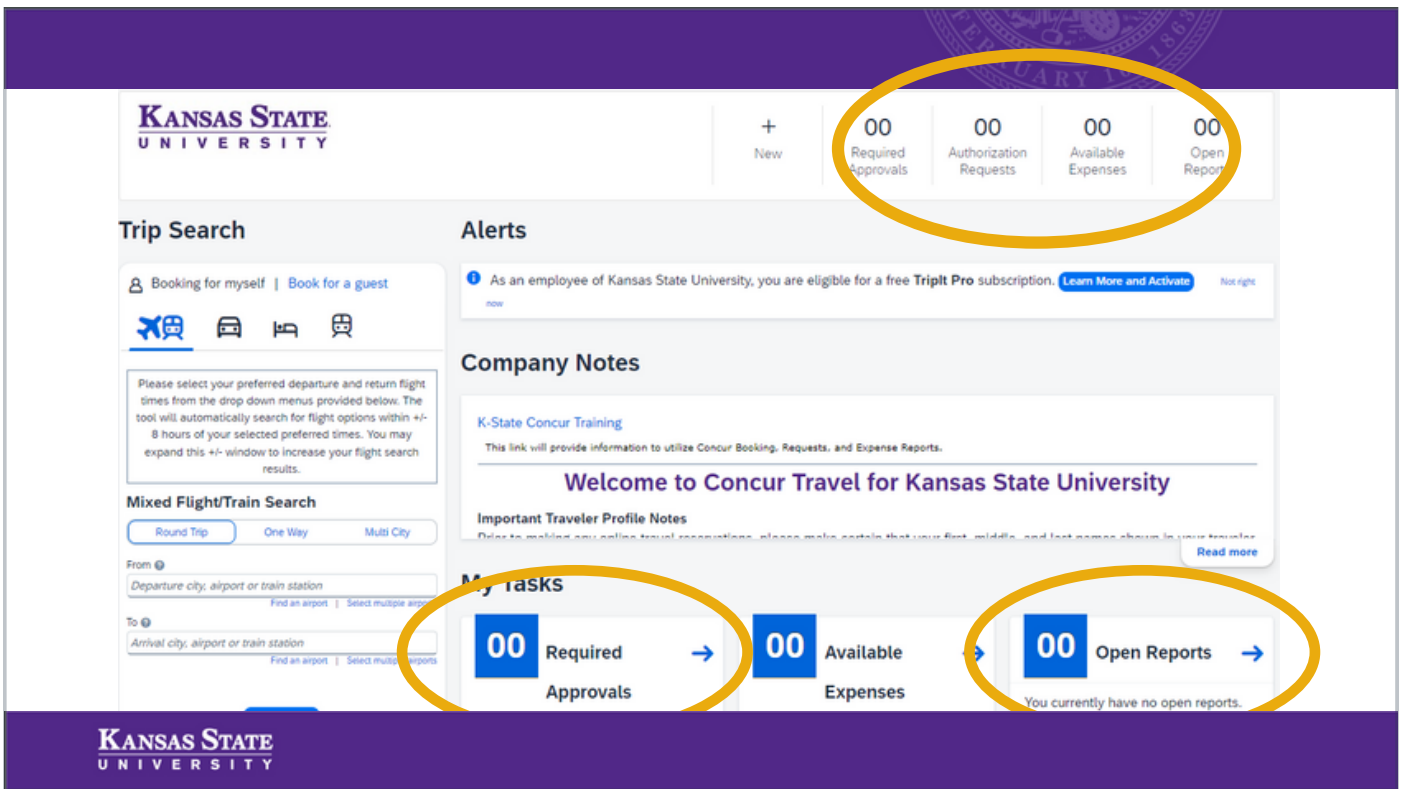




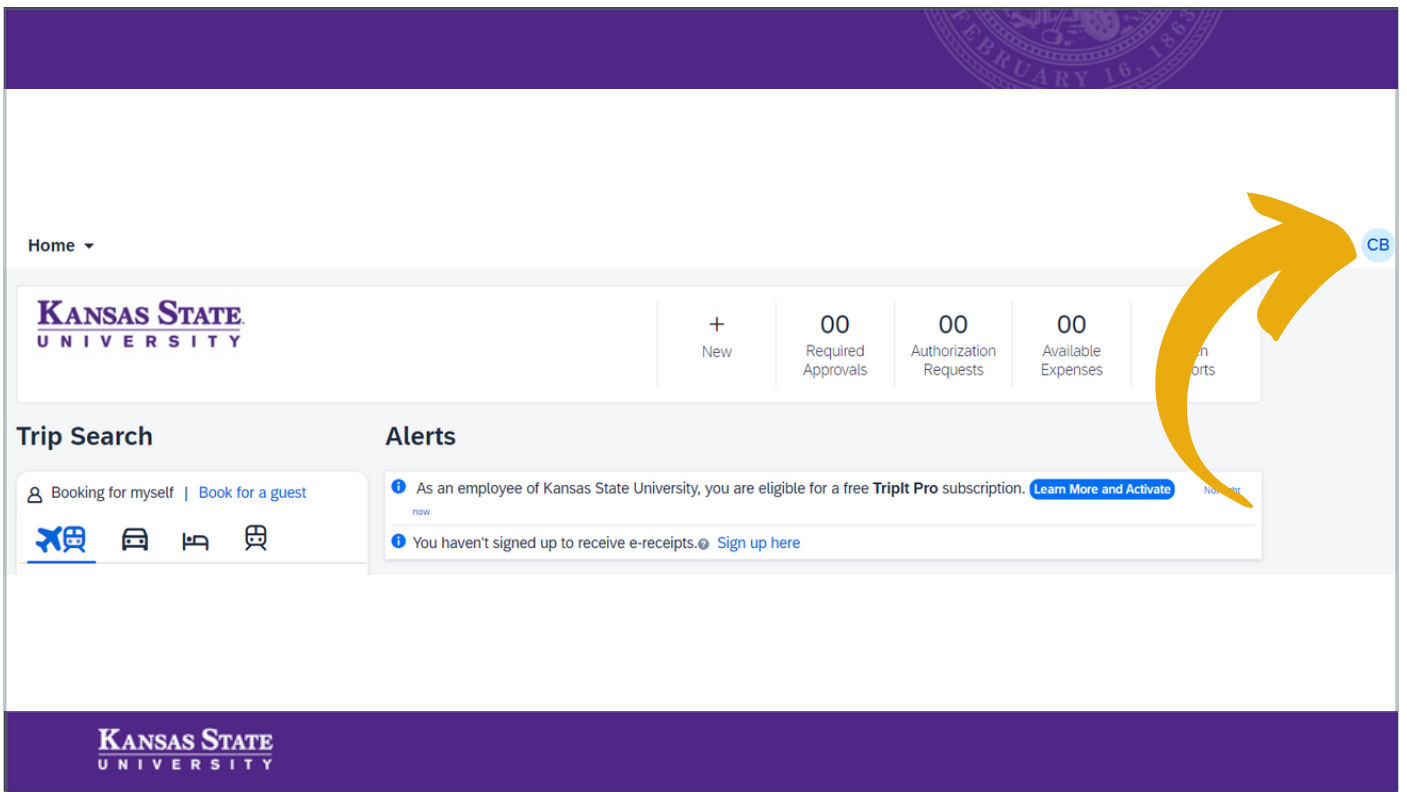
You'll notice that, next to the word Home, there's a triangle dropdown menu. You can click here



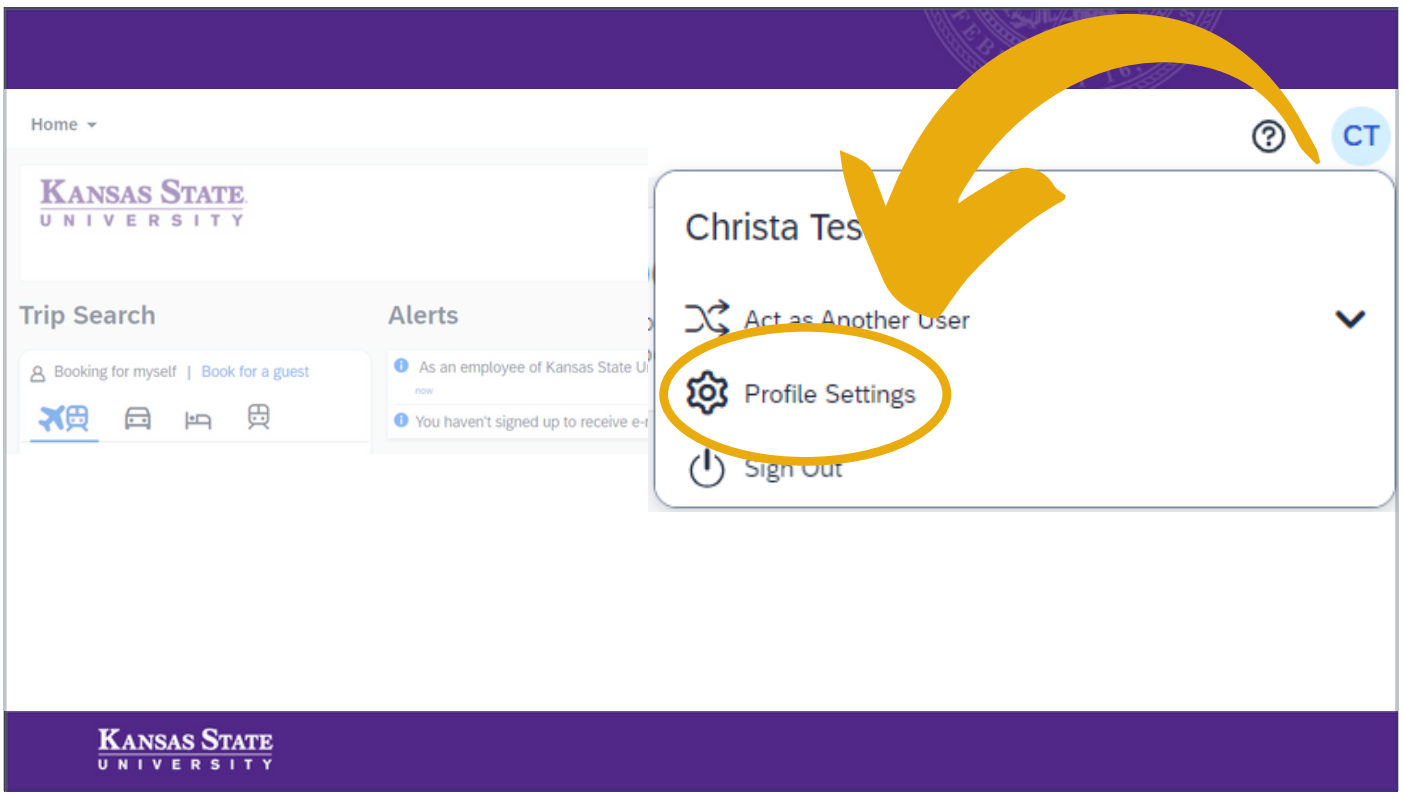
to open the dropdown menu of pages available to you in Concur. These include the Requests page, where you will access and work with requests; the Expense page, where you will access and work with expense reports; and, if you are an approver within your department, the Approvals page, where you will access and work with all items requiring your approval.



You can also access these items from the top menu bar or center section of the dashboard or in the center My Tasks section. You'll notice that a consistent element of Concur is that it provides numerous options for navigation. You can use the one that works best for you.



Also on the dashboard, in the top right corner, you'll see the round profile icon.



You can click here to access your profile settings. One of the first things you will want to do to get started in Concur is to work through these profile settings to get Concur set up for yourself.



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Vehicle Configuration

Vehicle Configuration

Concur Mobile Registration

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

Change your password.

Clicking on the profile settings link takes you to the Profile Options page.

The screenshot shows the SAP Concur Profile page. At the top, there is a navigation bar with the following links: Profile, Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. A yellow arrow points to the 'Profile' link. Below the navigation bar, the page is divided into several sections:

- Information**: Personal Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards
- Travel Settings**: Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers
- Request Settings**: Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees
- Expense Settings**: Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Vehicle Configuration, Favorite Attendees
- Profile Options**: Select one of the following to customize your user profile.
  - Personal Information**: Your home address and emergency contact information.
  - Company Information**: Your company name and business address or your remote location address.
  - Credit Card Information**: You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
  - E-Receipt Activation**: Enable e-receipts to automatically receive electronic receipts from participating vendors.
  - Travel Vacation Reassignment**: Going to be out of the office? Configure your backup travel manager.
  - Request Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
  - Vehicle Configuration**: Vehicle Configuration
  - Concur Mobile Registration**
- System Settings**: Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**: How can we contact you about your travel arrangements?
- Setup Travel Assistants**: You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**: Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**: Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Change Password**: Change your password.

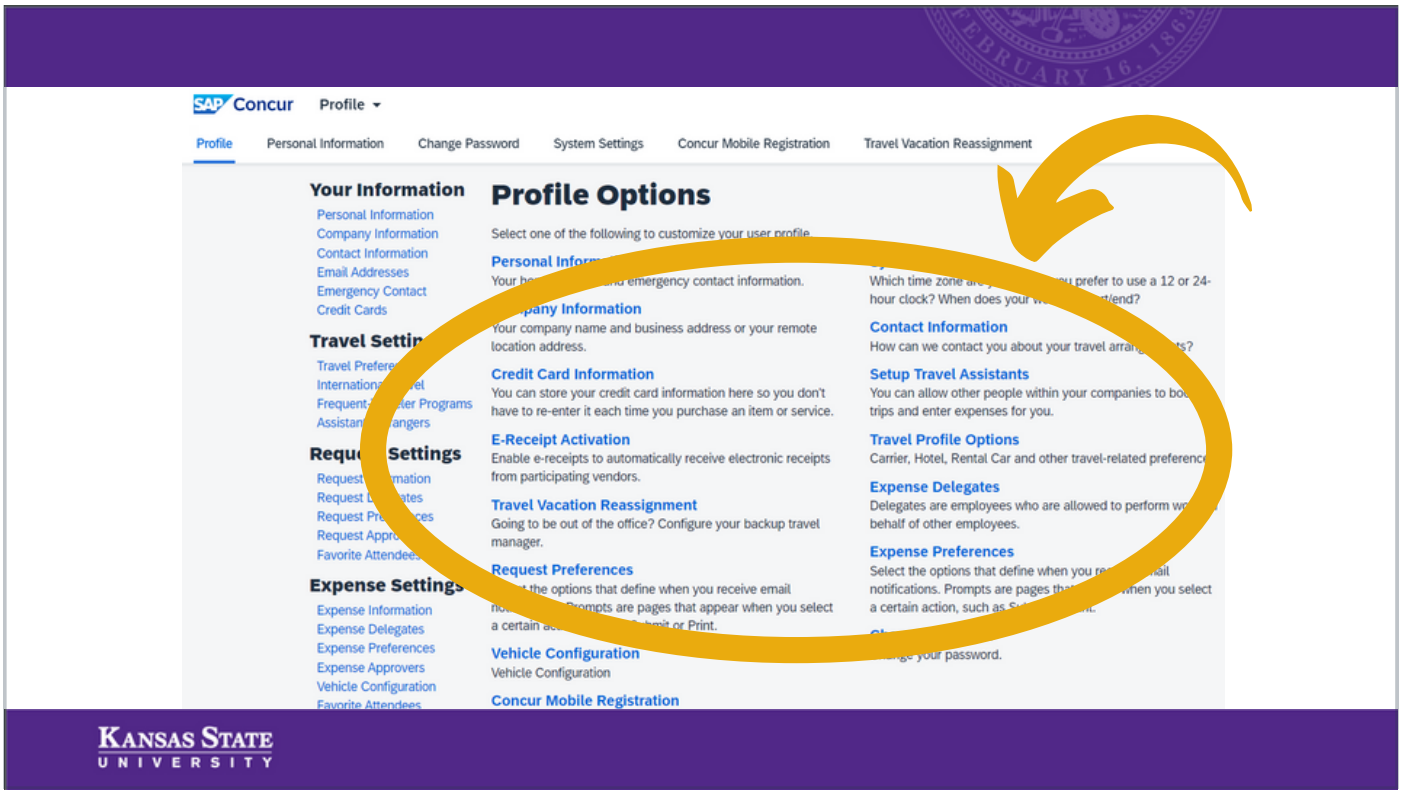
The Kansas State University logo is visible in the bottom left corner of the page.

There are quick links at the top of the page to access some of the most commonly-used settings,

The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and a 'Profile' dropdown menu. Below this, a horizontal menu contains several options: Profile, Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and is divided into several sections: 'Your Information', 'Personal Information', 'Company Information', 'Travel Settings', 'Request Settings', 'Expense Settings', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Request Preferences', 'Vehicle Configuration', and 'Concur Mobile Registration'. A yellow circle highlights the left sidebar, and a yellow arrow points from the circle to the 'Profile' option in the top navigation bar. The bottom of the page features the Kansas State University logo.

or you can access any of the settings from the left sidebar





or the main content of the page.

The screenshot shows the SAP Concur Profile page. At the top, there is a navigation bar with 'SAP Concur' and a 'Profile' dropdown menu. Below this, a secondary navigation bar lists 'Profile', 'Personal Information', 'Change Password', 'System Settings', 'Concur Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is divided into two columns. The left column, titled 'Your Information', lists various settings categories: Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards, Travel Settings, Request Settings, and Expense Settings. The right column, titled 'Profile Options', provides a brief description for each category. A yellow circle highlights the 'Personal Information' link in the left column, and a yellow arrow points from this circle to the 'Personal Information' link in the right column. The bottom of the page features the Kansas State University logo.

**SAP Concur** Profile ▾

Profile Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation Reassignment

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- Travel Programs
- Assistants/Arrangers

**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

**Expense Settings**

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

**Profile Options**

Select one of the following to customize your user profile.

- Personal Information**  
Your home address and emergency contact information.
- Company Information**  
Your company name and business address or your remote location address.
- Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**  
Going to be out of the office? Configure your backup travel manager.
- Request Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Vehicle Configuration**  
Vehicle Configuration
- Concur Mobile Registration**

**System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**  
How can we contact you about your travel arrangements?

**Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.

**Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Change Password**  
Change your password.

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One of the primary settings is Personal Information.



[Change Password](#)   [System Settings](#)   [Concur Mobile Registration](#)

### Your Information

- [Personal Information](#)
- [Company Information](#)
- [Contact Information](#)
- [Email Addresses](#)

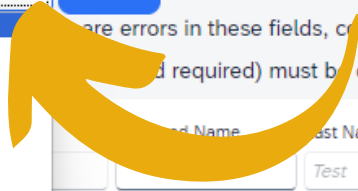
### Request Settings

- [Request Information](#)
- [Request Delegates](#)
- [Request Preferences](#)
- [Request Approvers](#)
- [Favorite Attendees](#)
- [International Travel](#)

## My Profile - Personal Information

Jump To:

- Personal Information
- Home Address
- Work Address
- Contact Info.
- Email Addresses
- Emergency Contact
- Travel Preferences
  - Air Travel Preferences
  - Hotel Preferences
  - Car Rental Preferences
  - Frequent-Traveler Programs
  - Unused Tickets
- International Travel: Passports and Visas



If there are errors in these fields, contact your concur administrator. (Required fields are indicated by an asterisk and required) must be completed to save.

Fields marked with an asterisk (\*) are required.

Title

First Name  Last Name  Suffix

Company

Test

Under Personal Information, the dropdown menu at the top of the page allows you to jump to any of Personal Information sections to quickly access the information you need to update—or you can scroll down the page.



### Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

### Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

## My Profile - Personal Information

Jump To: Personal Information

Disabled fields (gray) cannot be edited. For more information on these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Read Only]** (grayed and locked) must be completed to save your profile.

**Important Note**

Your Name and Airport Security information must be identical to the information on the photo identification you are presenting at the airport. Due to airport security, you may be turned away at the gate if the name on your identification does not match the name on your photo identification.

Title	First Name <b>[Required]</b>	Middle Name <b>[Required]</b>	Preferred Name	Last Name <b>[Required]</b>
	Christa	A		Beemer
		<input type="checkbox"/> No Middle Name		

Under the first section of the Personal Information page are your name details. The first and last name fields are sourced from HRIS. It is important to make sure these fields are correct and that you update any changes to your name in HRIS through your HR Liaison. The name listed in Concur must match the name used on your travel documents. This ensures that all travel registration corresponds with the IDs used for boarding.



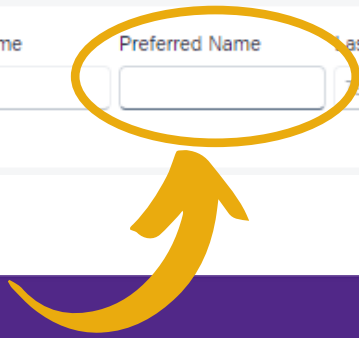
## My Profile - Personal Information

Jump To:

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required\*\*]** (validated and required) must be completed to save your profile.

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
<input type="text" value=""/>	<input type="text" value="Christa"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="West"/>	<input type="text" value=""/>



You can also enter your preferred name in Concur.

SAP Concur Profile ▾

Profile **Personal Information** Change Password System Settings Concur Mobile Registration

## Your Information **My Profile - Personal Information**

Personal Information  
Company Information  
Contact Information  
Email Addresses

Jump To:

- Personal Information
- Home Address
- Work Address
- Contact Info.
- Email Addresses
- Emergency Contact
- Travel Preferences
  - Air Travel Preferences
  - Hotel Preferences
  - Car Rental Preferences
- International Travel:
  - Frequent-Traveler Programs
  - Unused Tickets
- International Travel: Passports and Visas

Preferred Name  Last Name

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Along with confirming that your name is correct in Concur, you want to confirm that your address is correct and enter a phone number as well. These settings can be found under Contact Information.



## Home Address

[Go to top](#)

When entering the state, please use the abbreviation code versus the full state name.

Street

**your address on file in HRIS**

City

State/Province

Postal Code

Country/Region

United States of America

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The address information is sourced into Concur from HRIS. If this address is incorrect, you will need to update the address you have on file in HRIS.



### Contact Information

[Go to top](#)

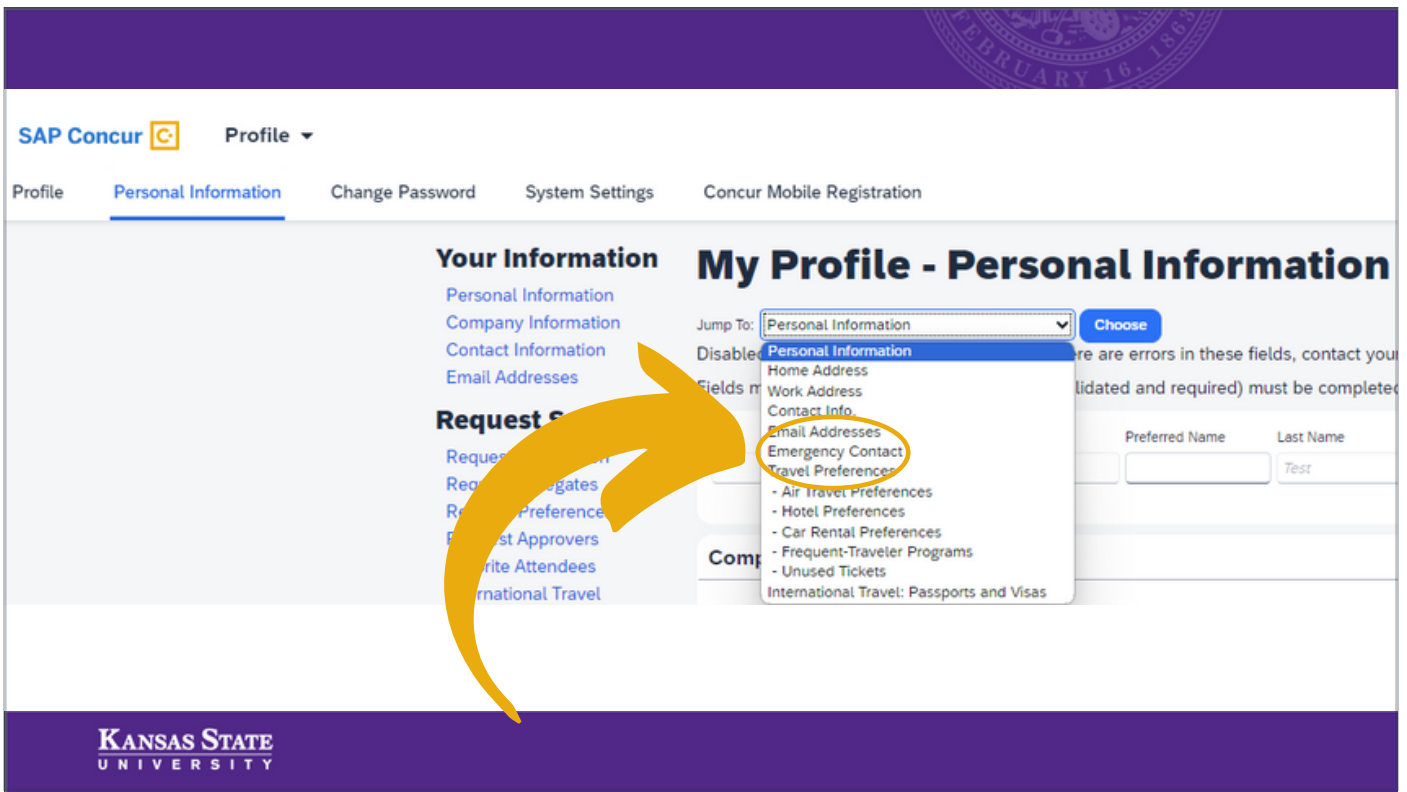
Work Phone <b>[Required**]</b>	Work Extension	Work Fax	2nd Work Phone/Remote Office
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone <b>[Required**]</b>	<input type="text"/>		
<input type="text"/>			
Pager	Other Phone		
<input type="text"/>	<input type="text"/>		
Mobile Phone Country/Region	Mobile Phone		
<input type="text"/>	<input type="text"/>		

**\*\*You must specify either a home phone or a work phone.**



The phone number is not sourced in. You can provide your preferred number but must enter at least one work or home number.





Under the Emergency Contact section,



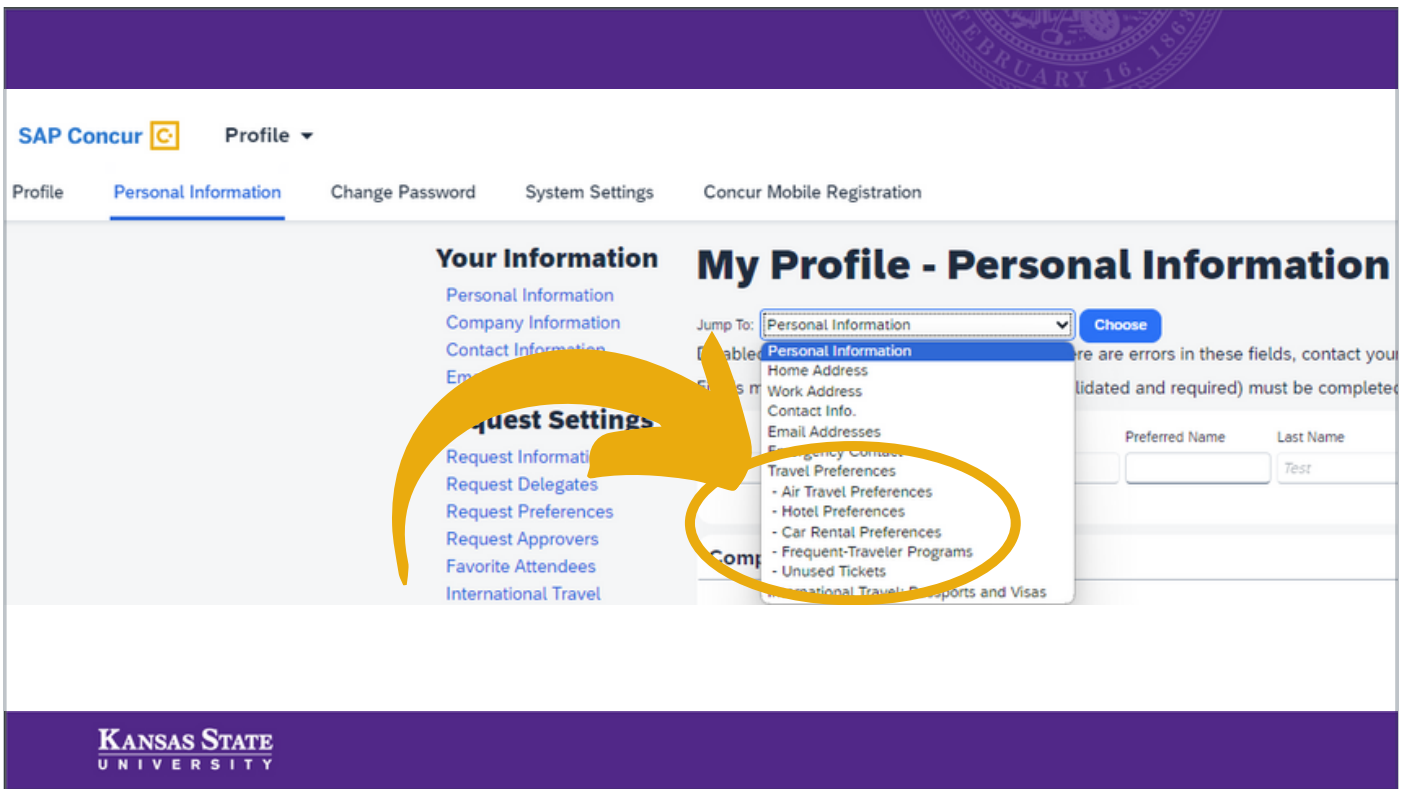
## Emergency Contact

[Go to top](#)

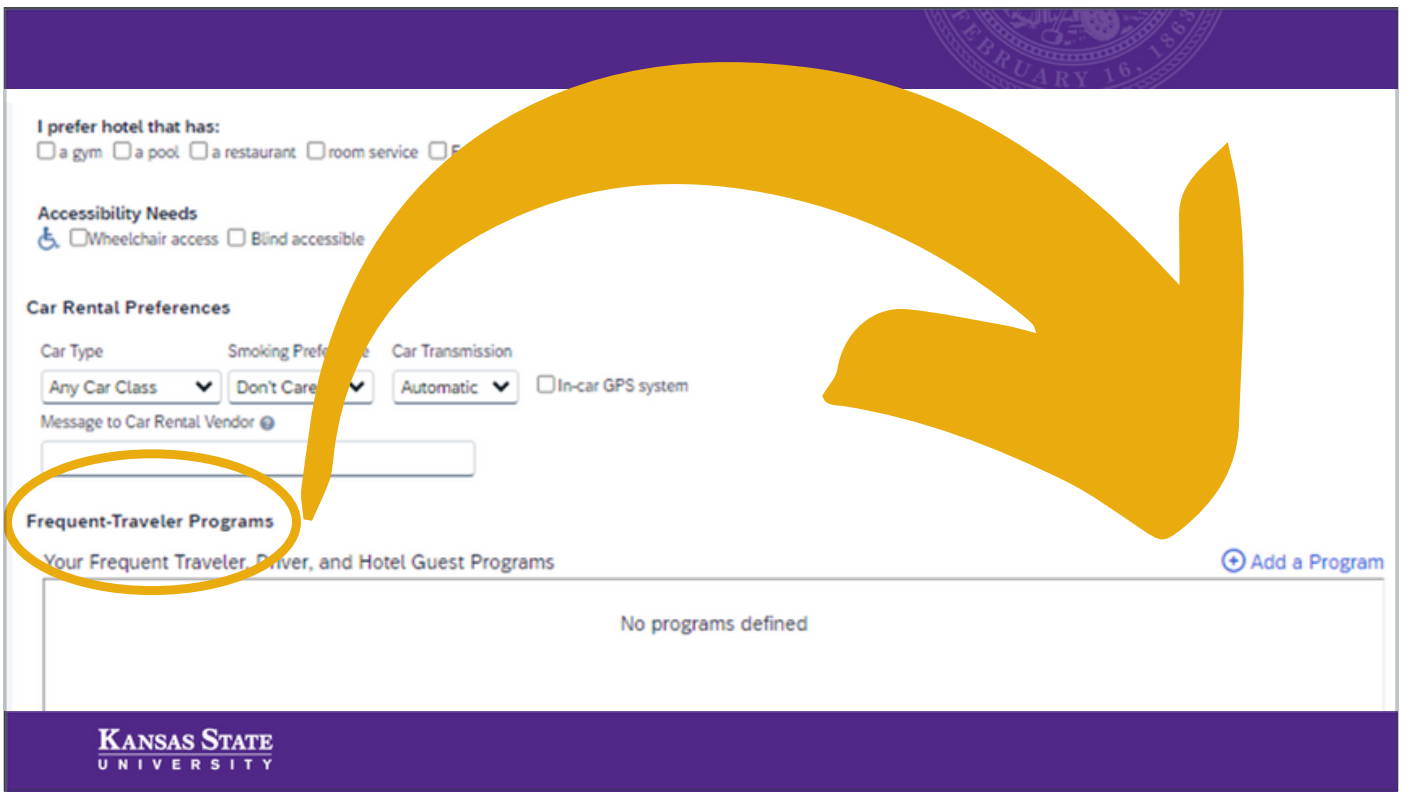
When entering the state, please use the 2-letter abbreviation code versus the full state name.

Name	Relationship	
<input type="text"/>	<input type="text"/>	
Street	<input checked="" type="checkbox"/> Address same as employee	
<input type="text" value="922 S Adams St"/>		
City	State/Province	Postal Code
<input type="text" value="Junction City"/>	<input type="text" value="KS"/>	<input type="text" value="66441"/>
Country/Region	Phone	Alternate Phone
<input type="text" value="United States of America"/>	<input type="text"/>	<input type="text"/>

you can fill details in to ensure an emergency contact is on file for you.

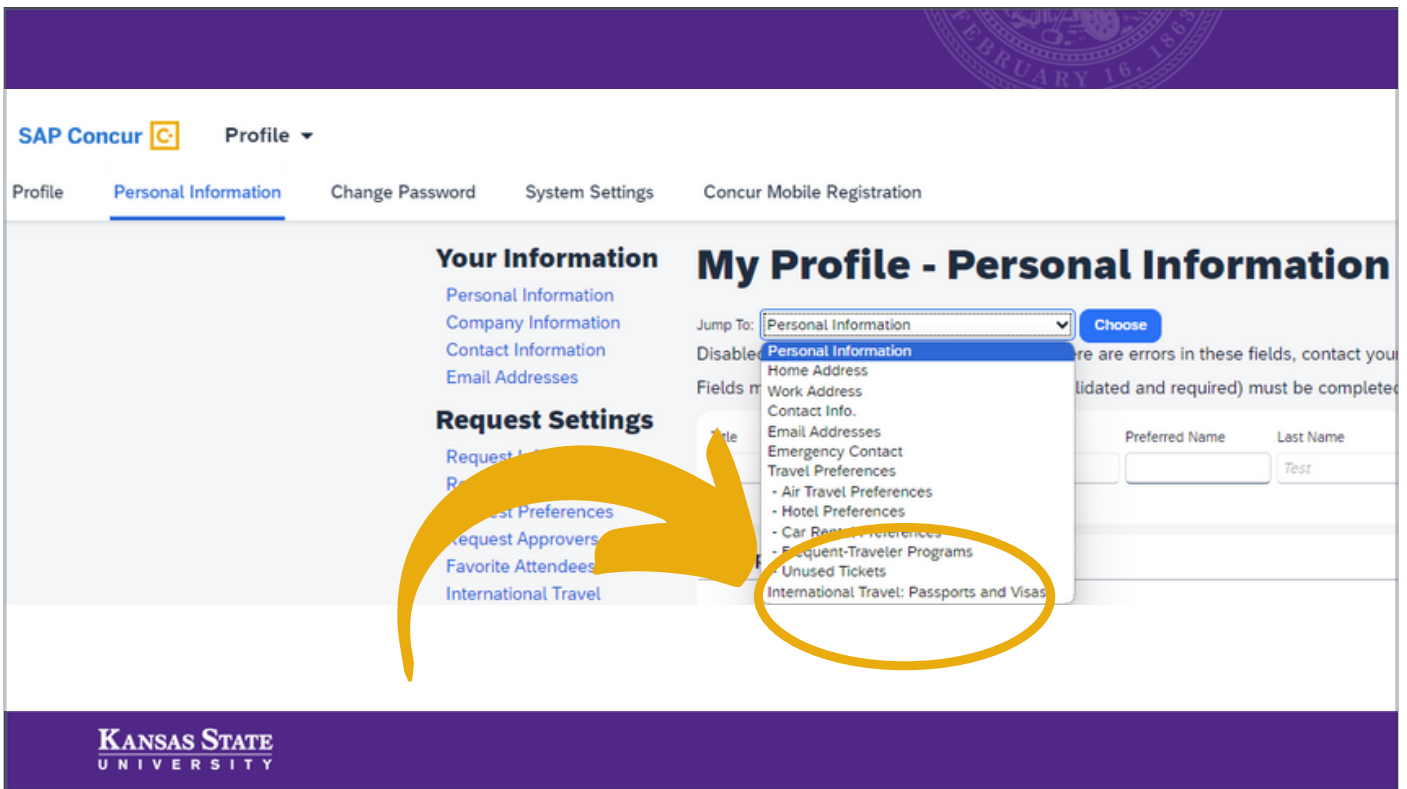


You'll also want to set your travel preferences for air travel, hotel, and car rentals to have Concur apply those for your travel bookings.



The image shows a screenshot of a travel booking form. At the top, there is a purple header with the Kansas State University logo and the text "FEBRUARY 16, 1863". Below the header, the form contains several sections: "I prefer hotel that has:" with checkboxes for "a gym", "a pool", "a restaurant", "room service", and "Free breakfast"; "Accessibility Needs" with checkboxes for "Wheelchair access" and "Blind accessible"; "Car Rental Preferences" with dropdown menus for "Car Type" (Any Car Class), "Smoking Preference" (Don't Care), and "Car Transmission" (Automatic), along with an "In-car GPS system" checkbox; and a "Message to Car Rental Vendor" text input field. A large yellow arrow points from the top right towards the "Frequent-Traveler Programs" section, which is circled in yellow. The "Frequent-Traveler Programs" section has the heading "Your Frequent Traveler, Driver, and Hotel Guest Programs" and a blue "Add a Program" button. Below this, it says "No programs defined". At the bottom of the form is the Kansas State University logo.

This includes a section to input your frequent traveler programs. Click on Add a Program to begin setting up a frequent traveler program you want points to be awarded to for travel booking purposes.



International travelers have the option on the Profile Settings Personal Information page to enter passport and visa info to include in reservations.



## Travel Preferences

[Go to top](#)

### International Travel: Passports and Visas

[Go to top](#)

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

#### Passports

[+ Add a Passport](#)

I do not have a passport



#### International Visas

[+ Add a Visa](#)

Click on the Add a Passport or Add a Visa option. The Concur system will alert you when the expiration date is approaching (usually providing about 6 months' advance notice).

**SAP Concur** Profile ▾

Profile Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation Reassignment

### Your Information

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- Contact Information
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- Emergency Contact
- Credit Cards

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### Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Vehicle Configuration

Vehicle Configuration

### Concur Mobile Registration

### System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

### Contact Information

How can we contact you about your travel arrangements?

### Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

### Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

### Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Change Password

Change your password.

**KANSAS STATE UNIVERSITY**

Back on the Profile Options page, either the Request Settings or Expense Settings section allows you to set up delegates.



**Terminology:**  
delegate

## **delegate**

a person with permission to create or approve a request/report for someone else

Delegates are individuals who have your permission to create requests or expense reports on your behalf or, if you are an approver in your department, individuals who may approve requests or reports on your behalf.





## Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

## Request Delegates

Delegates Delegate For

## Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

Delegates are employees who are allowed to perform work on behalf of other employees.  
Search by employee name, email address, employee id or login id

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
--------------------------	------	-------------	-------------------	-----------------	-------------	-----------------------	--------------------------	--------------------------

No records found.

## Expense Settings

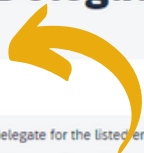
- Expense Information
- Expense Delegates

Going to either the Request Delegates or Expense Delegates page allows you to see or set up the delegates you have for yourself,

## Request Delegates

Delegates **Delegate For**

Delete



This employee may act as a delegate for the listed employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	<b>Test, Aaron</b> AaronTest@k-state.edu.uat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Test, Britt</b> BrittTest@k-state.edu.uat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Test, Ed</b> EdTest@k-state.edu.uat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

the people you are delegates for,

## Request Delegates

Delegates [Delegate For](#)

[Delete](#)

This employee may act as a delegate for selected employees.

Expense and Request share delegate settings. When assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	<b>Test, Aaron</b> AaronTest@k-state.edu.uat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Test, Britt</b> BrittTest@k-state.edu.uat	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Test, Ed</b> EdTest@k-state.edu.uat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

and preferences for delegate settings.

### Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

### Expense Settings

- Expense Information
- Expense Delegates



same

It is important to note that, although there are individual links to delegates for requests and delegates for expenses, the request and expense delegates are not unique; assigning a delegate to requests assigns it to expenses as well and vice versa.

**Your Information**  
Personal Information  
Company Information  
Contact Information  
Email Addresses

**Request Settings**  
Request Information  
Request Delegates  
Request Preferences  
Request Approvers  
Favorite Attendees  
International Travel

**Expense Settings**  
Expense Information  
Expense Delegates  
Expense Preferences  
Expense Approvers  
Vehicle Configuration  
Favorite Attendees

## Expense Preferences

Save Cancel

Select the options that define when you want to receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Send email when...

- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval

### Prompt...

For an approver when an expense report is submitted

### Sign me up for...

Expense Assistant using this method: By Month

**KANSAS STATE UNIVERSITY**

Also, for both Request and Expense settings, you can set preferences for the email notifications you would like to receive, such as when requests or reports change status in the approval process or when your university credit card charges are available for access in Concur. If you're an approver, it also has a preference setting for whether you want to receive email notifications when items come into your approval queue and need approval.



**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

**Request Setting:**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

**Expense Settings**

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

**Profile Options**

Select one of the following to customize your user profile.

**Personal Information**

Your home address and emergency contact information.

**Company Information**

Your company name and business address or your remote location address.

**Credit Card Information**

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**

Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel vacation Reassignment**

Going to be out of the office? Configure your backup travel manager.

**Request Preferences**

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Vehicle Configuration**

Vehicle Configuration

**Concur Mobile Registration**

**System Settings**

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**

How can we contact you about your travel arrangements?

**Setup Travel Assistants**

You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**

Carrier, Hotel, Rental Car and other travel-related preferences.

**Expense Delegates**

Delegates are employees who are allowed to perform work on behalf of other employees.

**Expense Preferences**

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Change Password**

Change your password.

Also on the Profile Options page, you can activate e-receipts.



**Your Information**

- [Personal Information](#)
- [Company Information](#)
- [Contact Information](#)
- [Email Addresses](#)
- [Emergency Contact](#)
- [Credit Cards](#)

**Travel Settings**

- [Travel Preferences](#)
- [International Travel](#)
- [Frequent-Traveler Programs](#)
- [Assistants/Arrangers](#)

## E-Receipt Activation

You have enabled e-receipts from participating partners to sync with your SAP Concur account. You may disable this functionality at any time. If you disable this setting, SAP Concur will no longer request e-receipts from these partners.

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator. [Disable](#)

E-receipts are electronic receipt images sent directly to Concur from Concur's partner vendors, which include hundreds of airlines, hotels, and rental car companies. E-receipts eliminate the need for paper receipts and are automatically imported into your Concur profile where it matches to the expense in question.



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Vehicle Configuration

Vehicle Configuration

Concur Mobile Registration

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

Change your password.

The Profile Options page includes additional settings sections as well. Feel free to explore the full range of settings options.



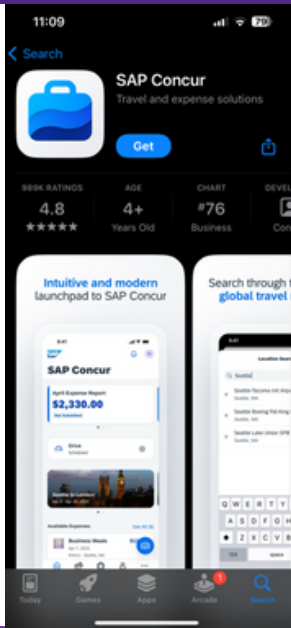


And we will pause here. Does anyone have any questions so far?

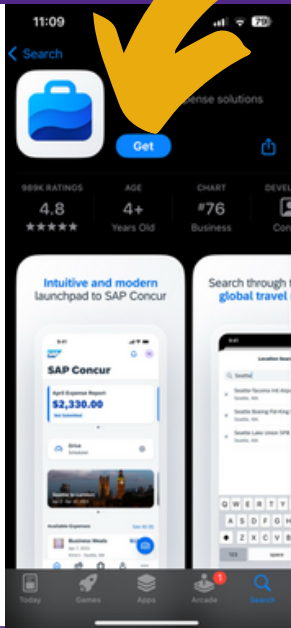


# Mobile App

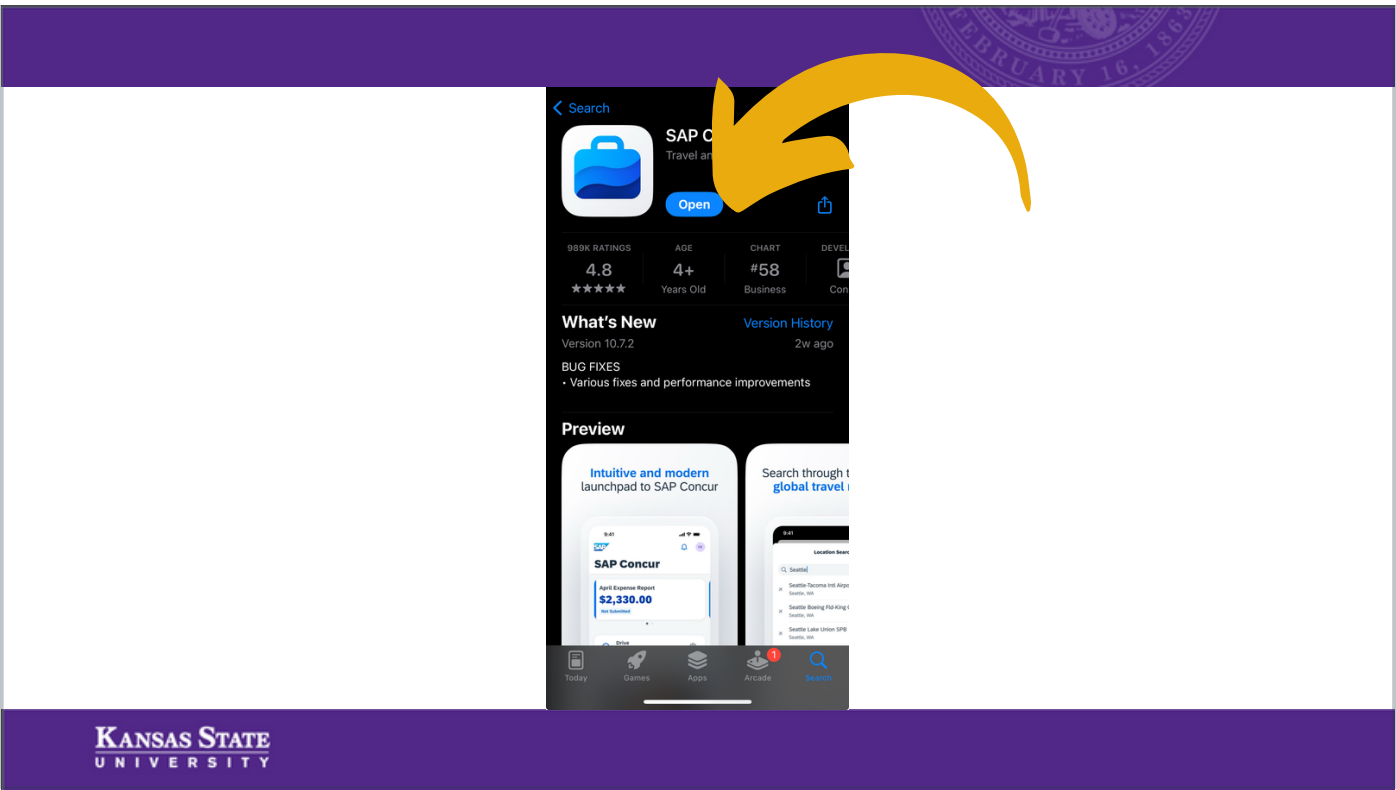
As another means of helping you get started with Concur, we want to look next at Concur's mobile app. For today's training, we are going to demonstrate almost all processes in the web version, but we wanted to highlight the mobile app for you and give you an opportunity to get started with it.



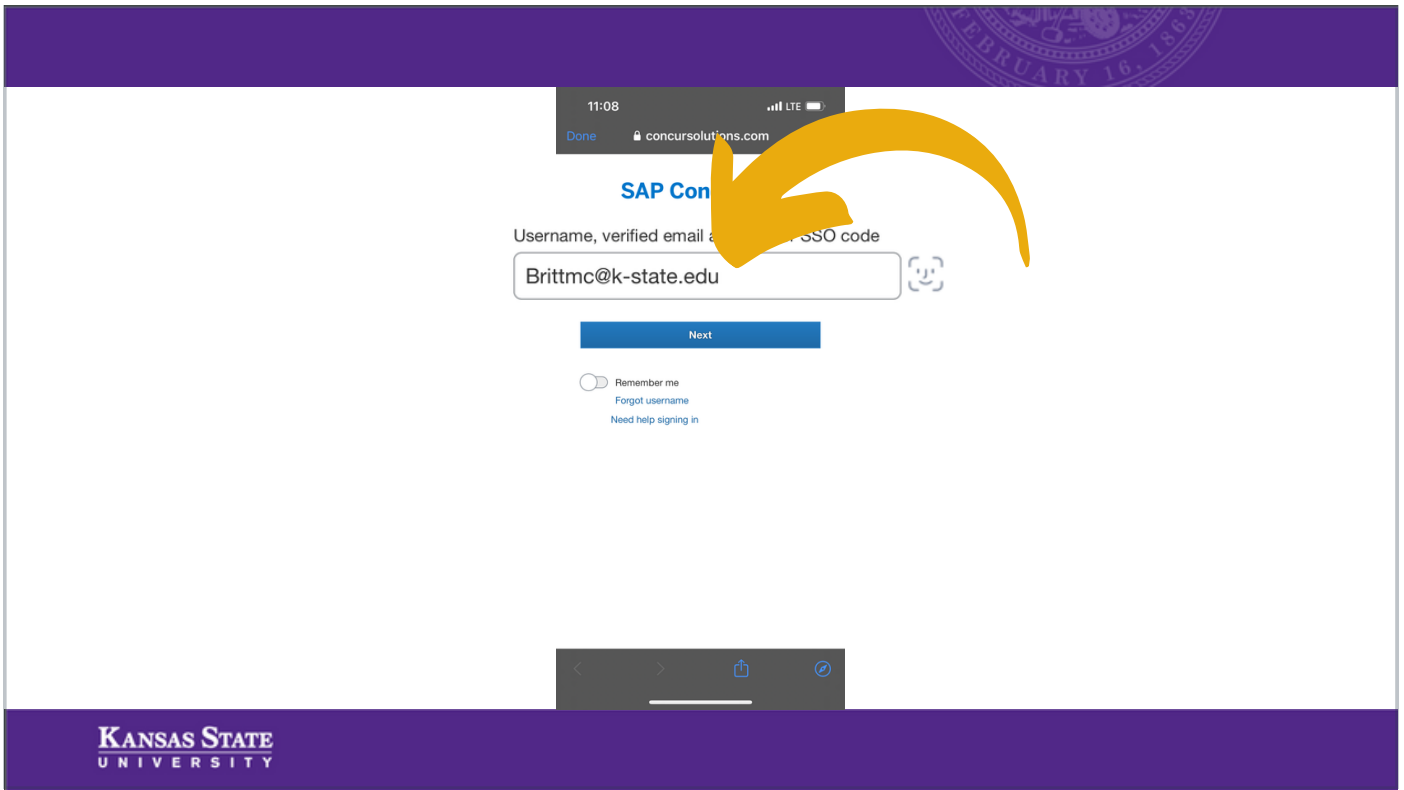
To access the app, in your smart phone's app store search for SAP Concur. You should see Concur's blue suitcase icon.



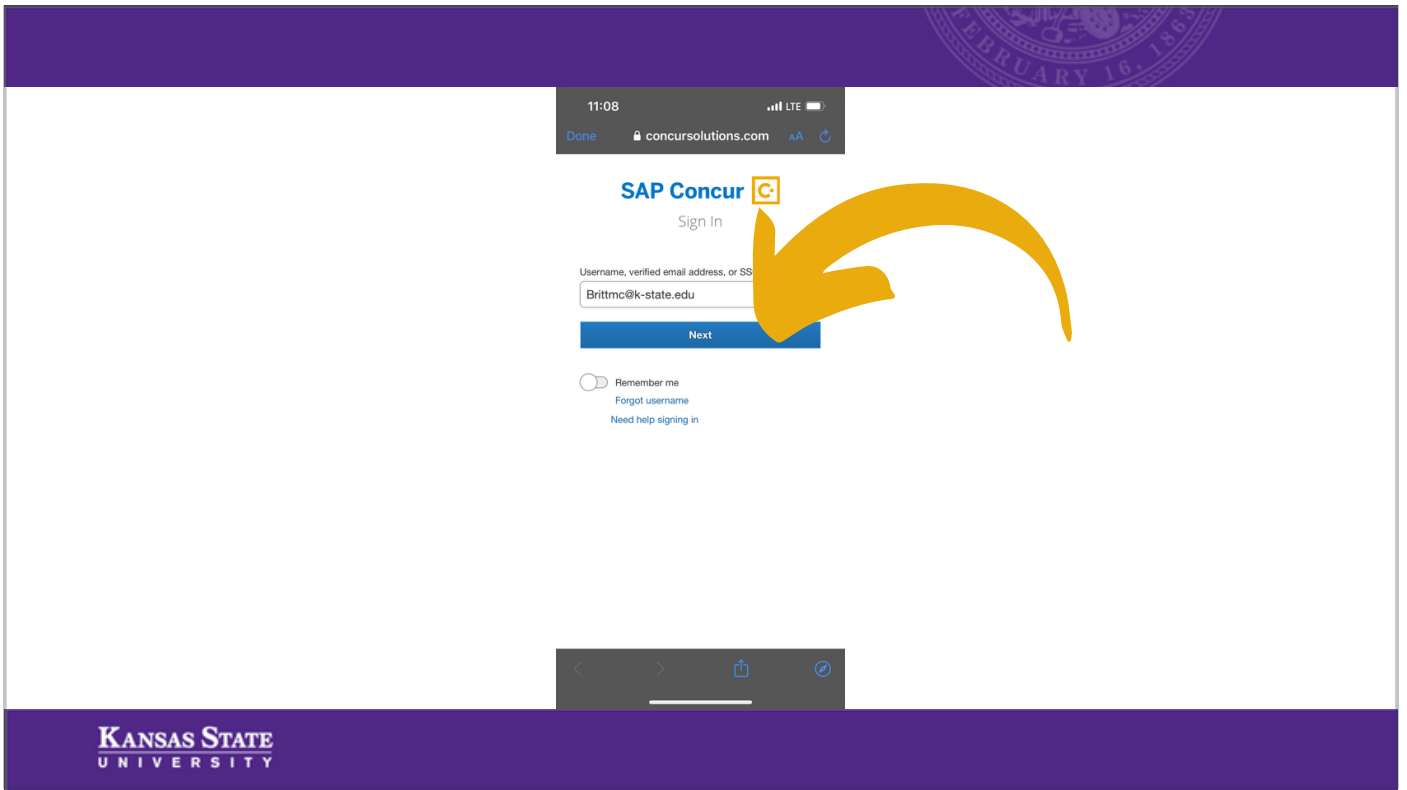
Download the app to your phone



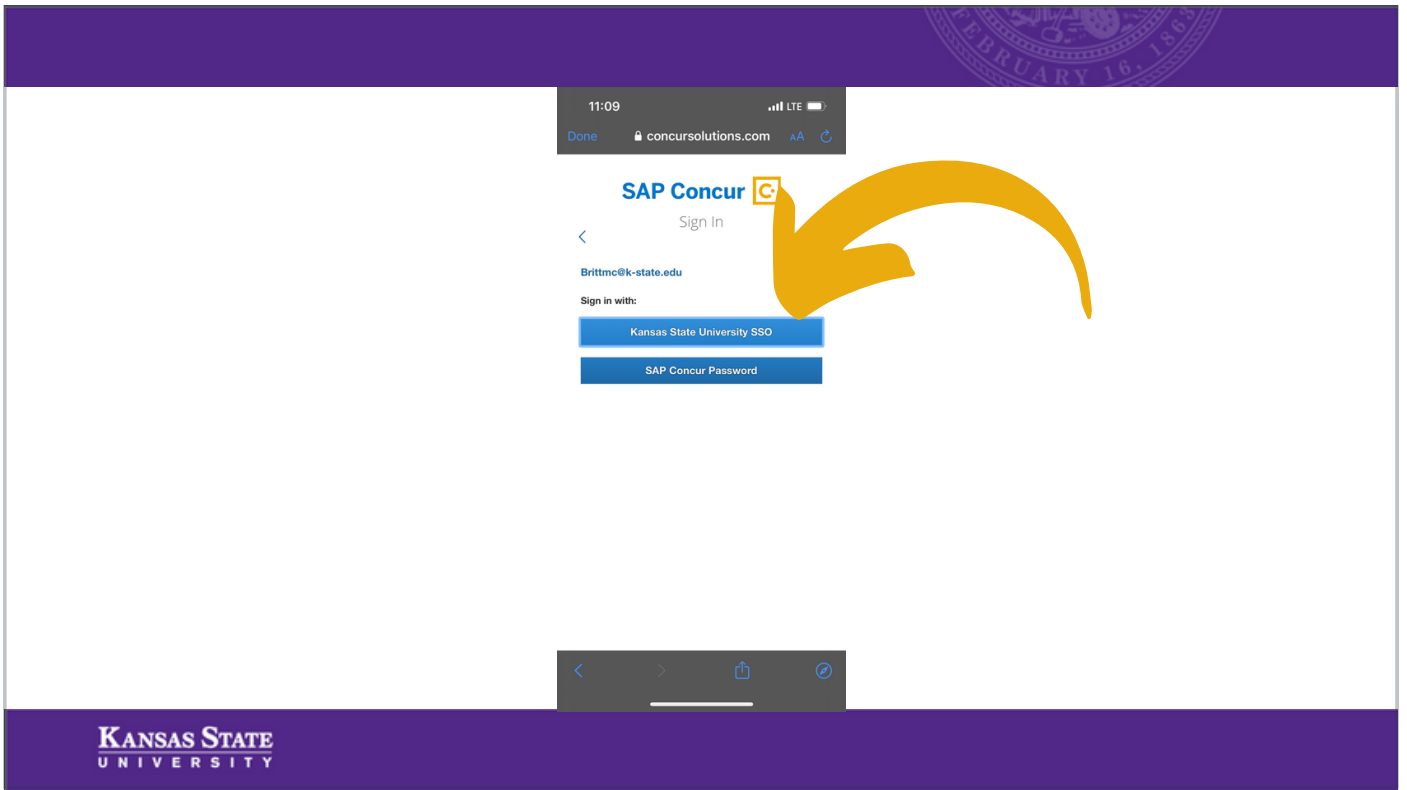
and open it.



On the sign-in screen that appears, enter your K-state email address as (EID)@k-state.edu

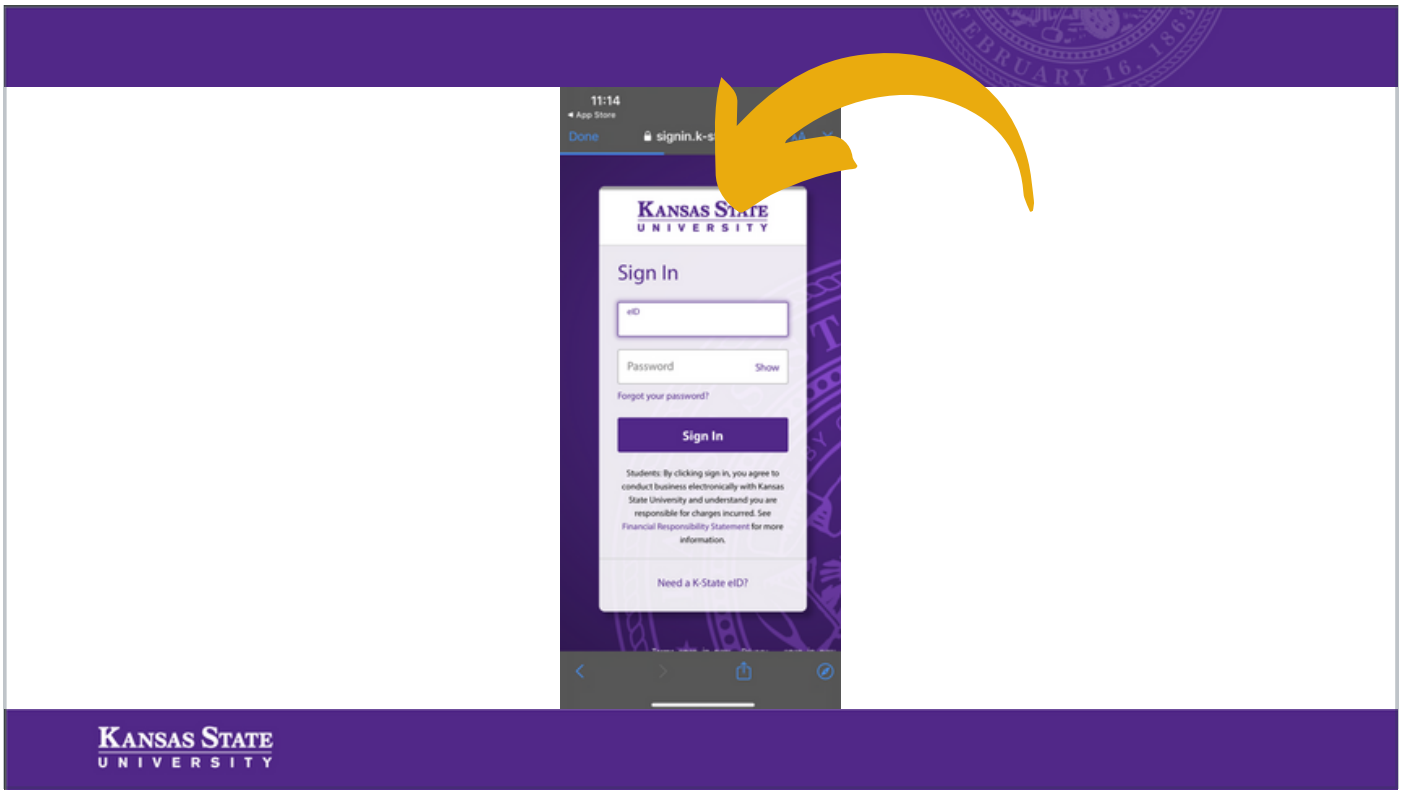


And click next.

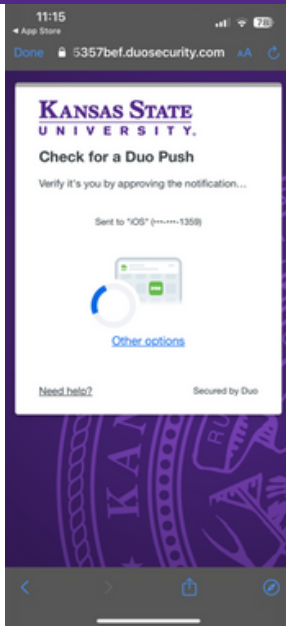


Select the Kansas State University SSO option,

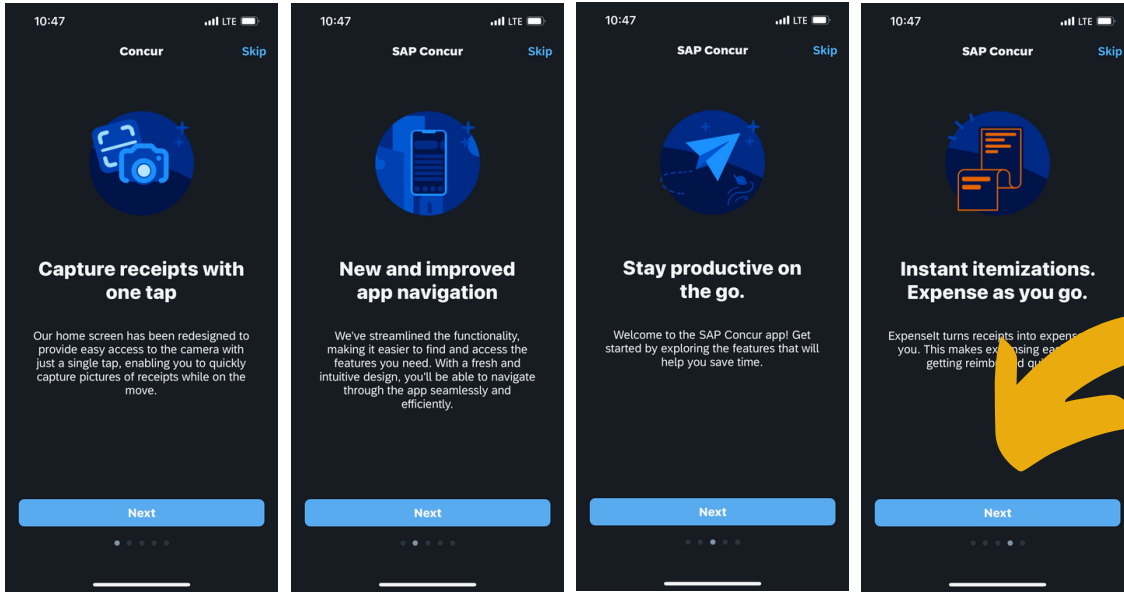




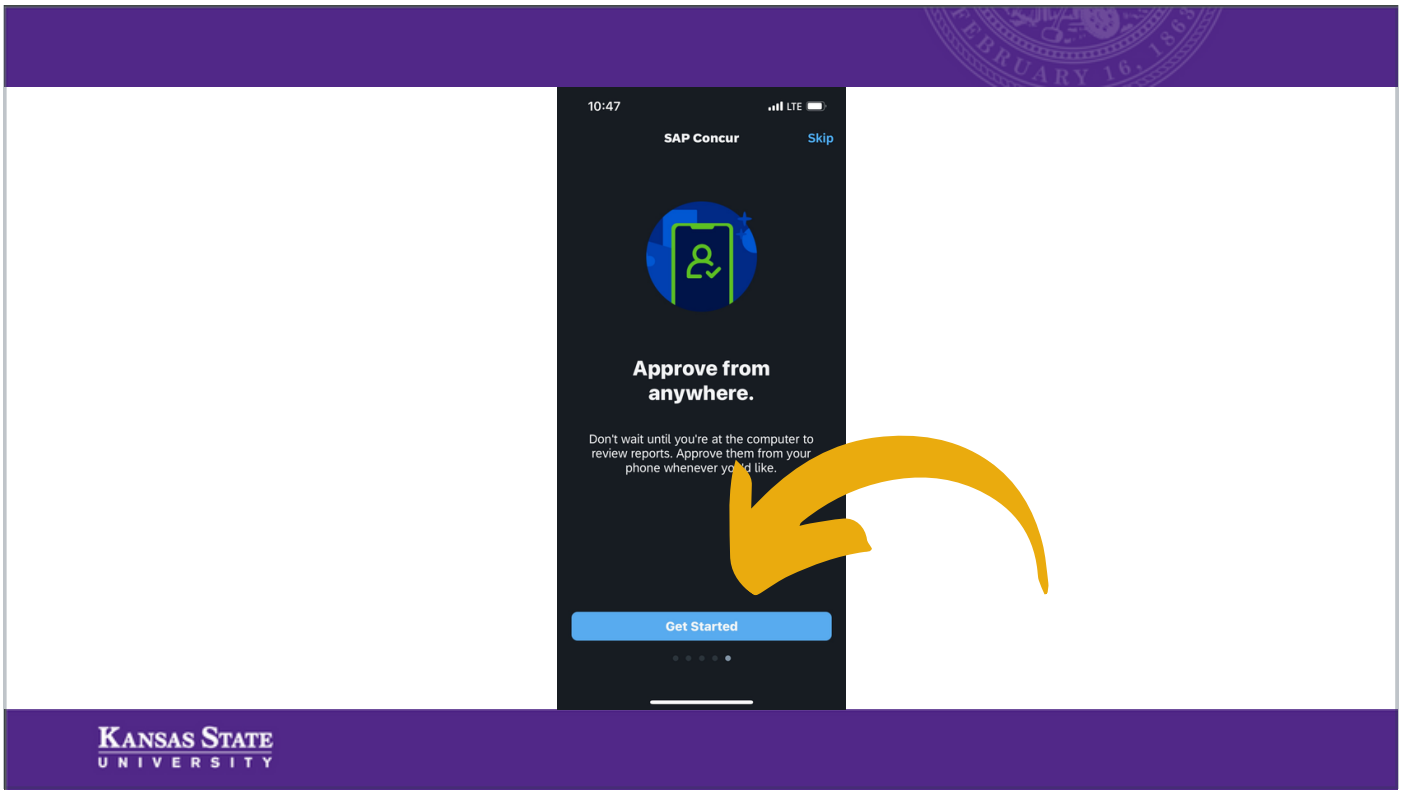
enter your K-State eID and password,



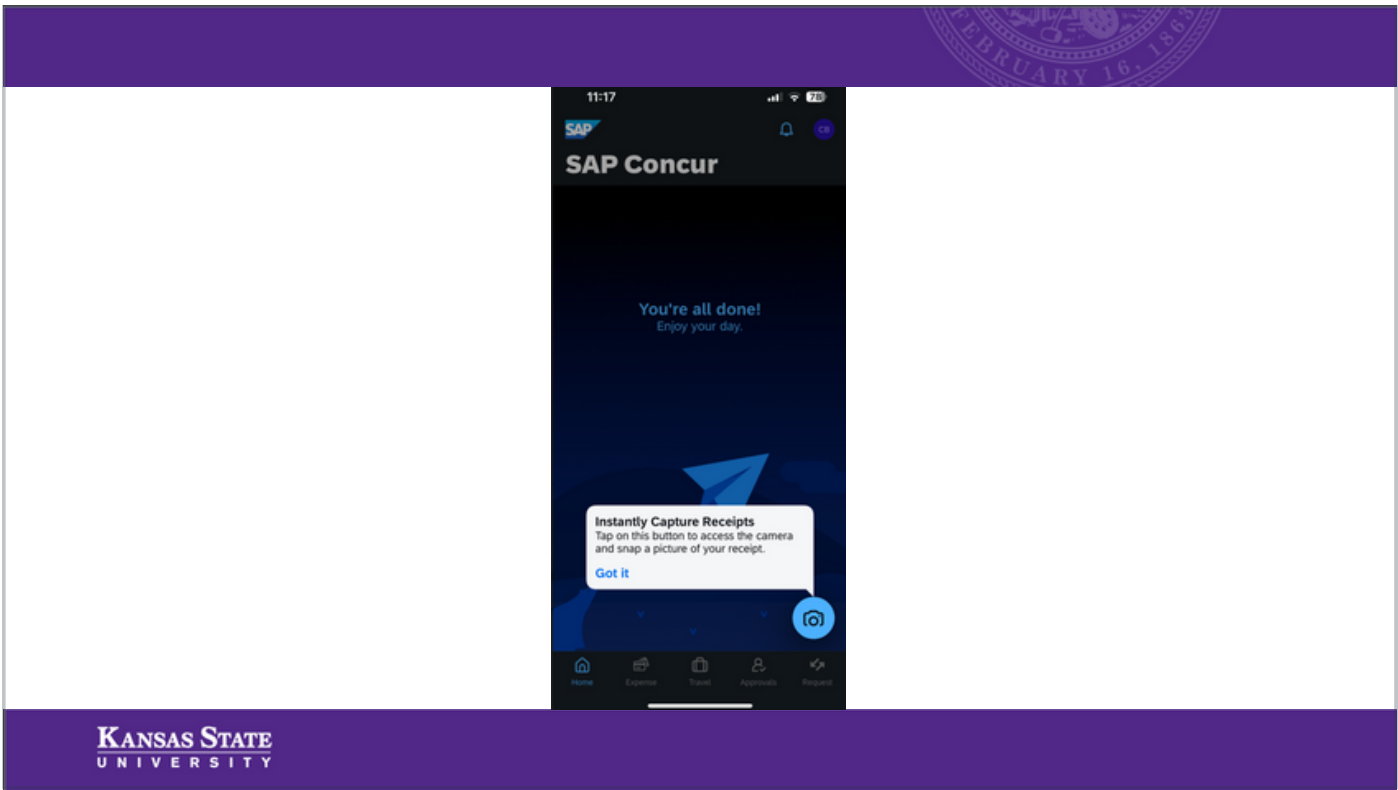
and complete the Duo confirmation.



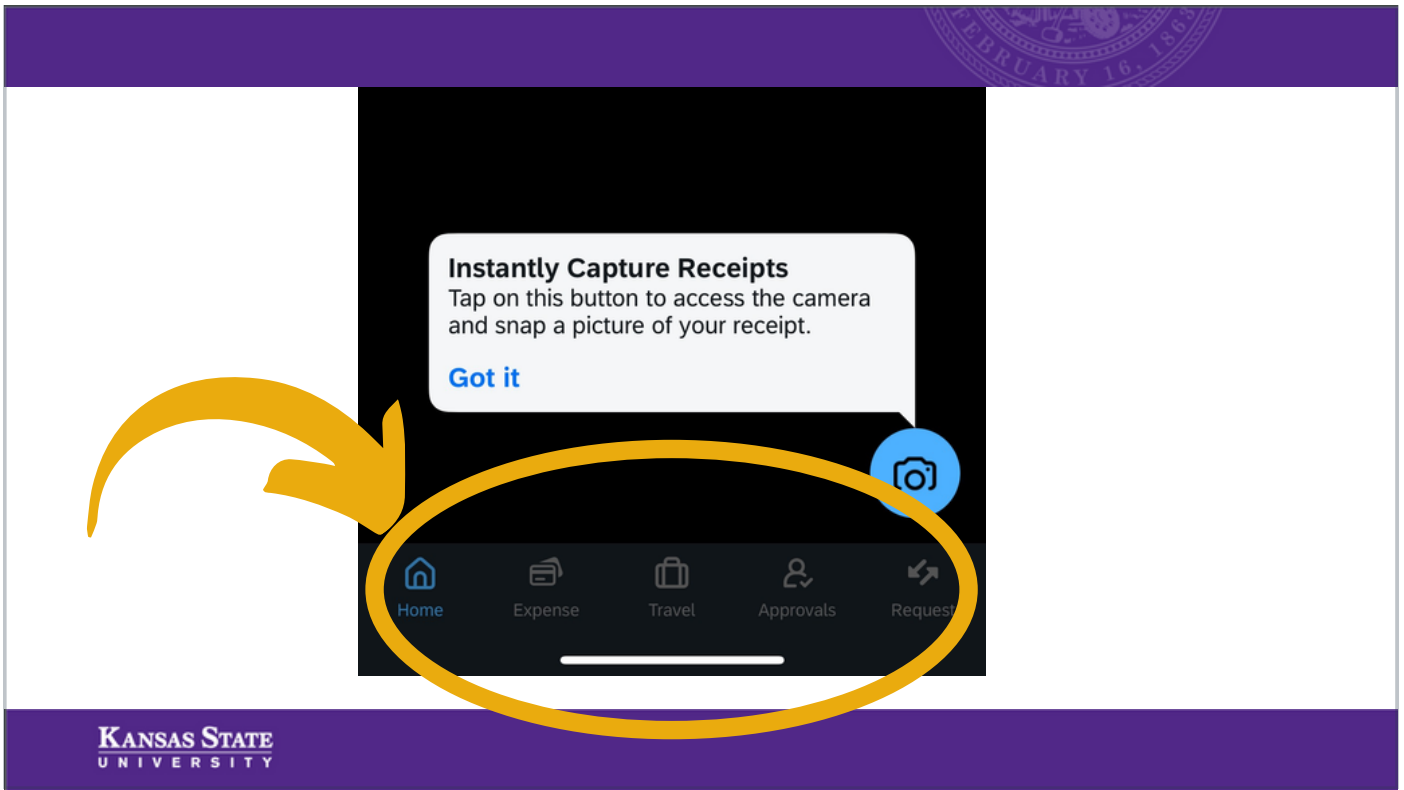
You will see several screens that provide information on Concur's mobile app features. Click Next on each of these.



On the last feature screen, Approve from Anywhere, click the Get Started button.



A screen will appear with information about capturing receipts. We will talk more about this later when we cover adding expenses and receipts to expense reports.



Your menu options are at the bottom of the screen. These are the same options available to you on the web version. You can do all things in Concur from either the app or the web version, but we have found that the app is easier for some options and the web version is easier for others.

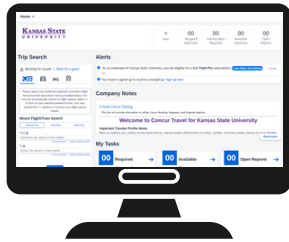


- adding receipts
- creating automated expense reports
- doing final review/submission of simple expense reports
- doing approvals

We recommend the mobile app for adding receipts, creating automated expense reports through Expenselt, doing a final review and submission of simple expense reports, and doing approvals.



- adding receipts
- creating automated expense reports
- doing final review/submission of simple expense reports
- doing approvals



- setting up profile/delegates
- creating requests
- adding funding information
- doing final review/submission of complex expense reports

On the other hand, we've found the web version works better for setting up your profile and delegates, creating travel and card requests, adding funding information, and doing a final review and submission of more complex expense reports. Again, though, you can do all these things in either version.





Do we have any questions about the app ?



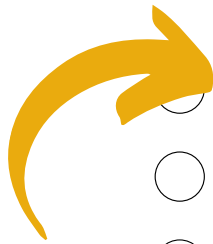
# Creating Requests

We'll look next at starting a request in Concur.

The image shows a screenshot of the SAP Concur 'Create New Request' form. The form is titled 'Create New Request' and has a close button (X) in the top right corner. A yellow arrow points to the 'Request Type' dropdown menu, which is currently set to '\*Credit Card Request'. The dropdown menu is open, showing two options: '\*Credit Card Request' and '\*Travel Request'. The '\*Travel Request' option is circled in yellow. The form includes several required fields, indicated by an asterisk (\*): 'Request Type', 'Request Date' (with a date picker icon), 'Phone Number to Use for Fraud Verification', 'User Type' (set to 'None Selected'), 'Card Product Type' (set to 'None Selected'), and 'Department' (set to '(90001) Test Department 1'). There are 'Cancel' and 'Create Request' buttons at the bottom right. The SAP Concur logo and 'Requests' menu are visible in the top left. The Kansas State University logo is at the bottom left.

There are two types of requests, credit card requests and travel requests. For our purposes today we are going to focus on travel requests, but we will come back to credit cards later to touch on a few key points.

## Before Travel To Do List



- Submit travel request \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

A travel request must be submitted and approved for university travel before the travel takes place,

Request/Trip Purpose \*

3) Research

5) Faculty Led Study Abroad

6) Student or Faculty Recruiting

7) Donor/Alumni Relations

8) In-State Mileage (Parking/Tolls)

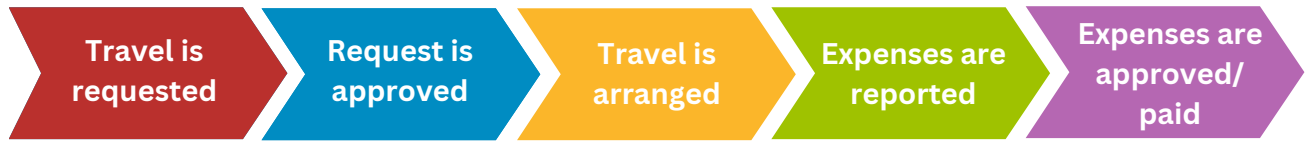
9) Other



8) In-State Mileage

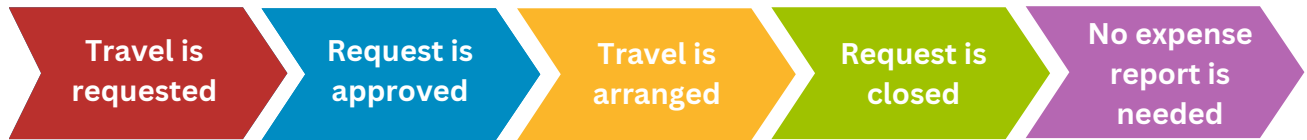


with the exception that no request is required for monthly in-state mileage travel.

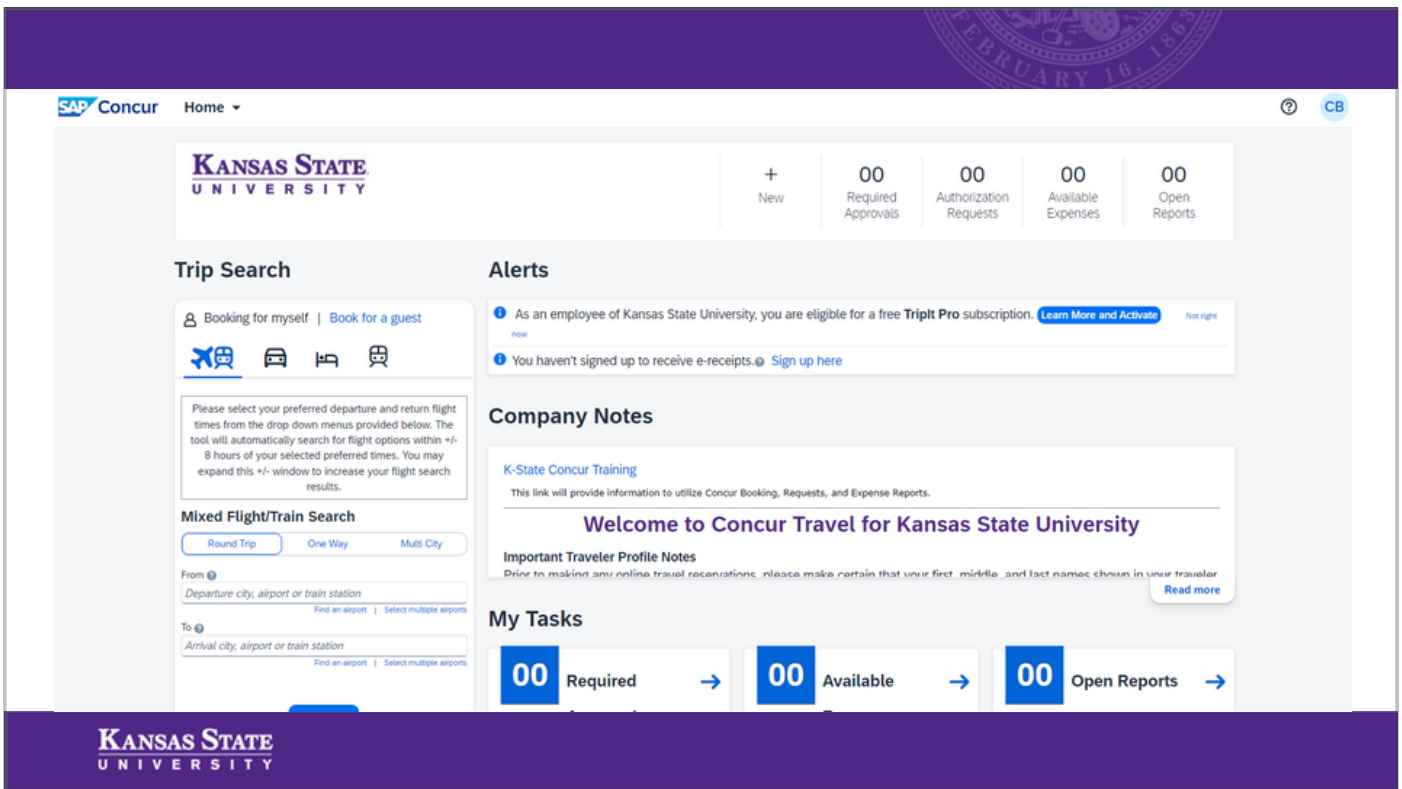


The Concur travel process starts with a request that establishes the dates and locations of the travel, as well as the estimated expenses. Once the request is fully approved, the traveler may make travel arrangements. Exact expenses associated with the travel must then be entered into an expense report generated from the request, approved, and then reviewed and processed for payment.

# Travel Funded Outside University

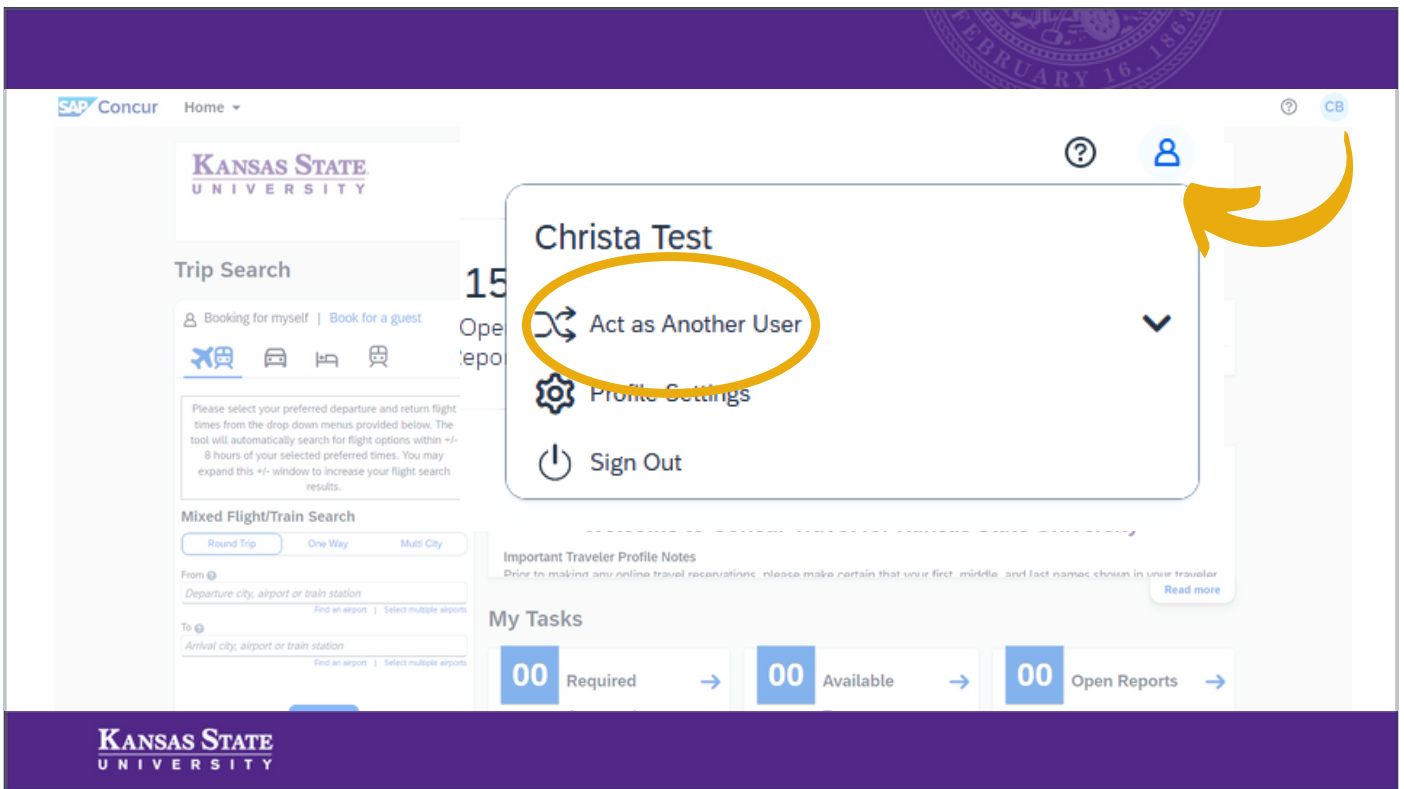


For employee business travel funded by sources outside the university, a travel request may be submitted through Concur for departments to establish a duty of care process for their employees. In such instances, the request should be closed after approval and does not need to be followed by an expense report, as no payment of university funds is required.

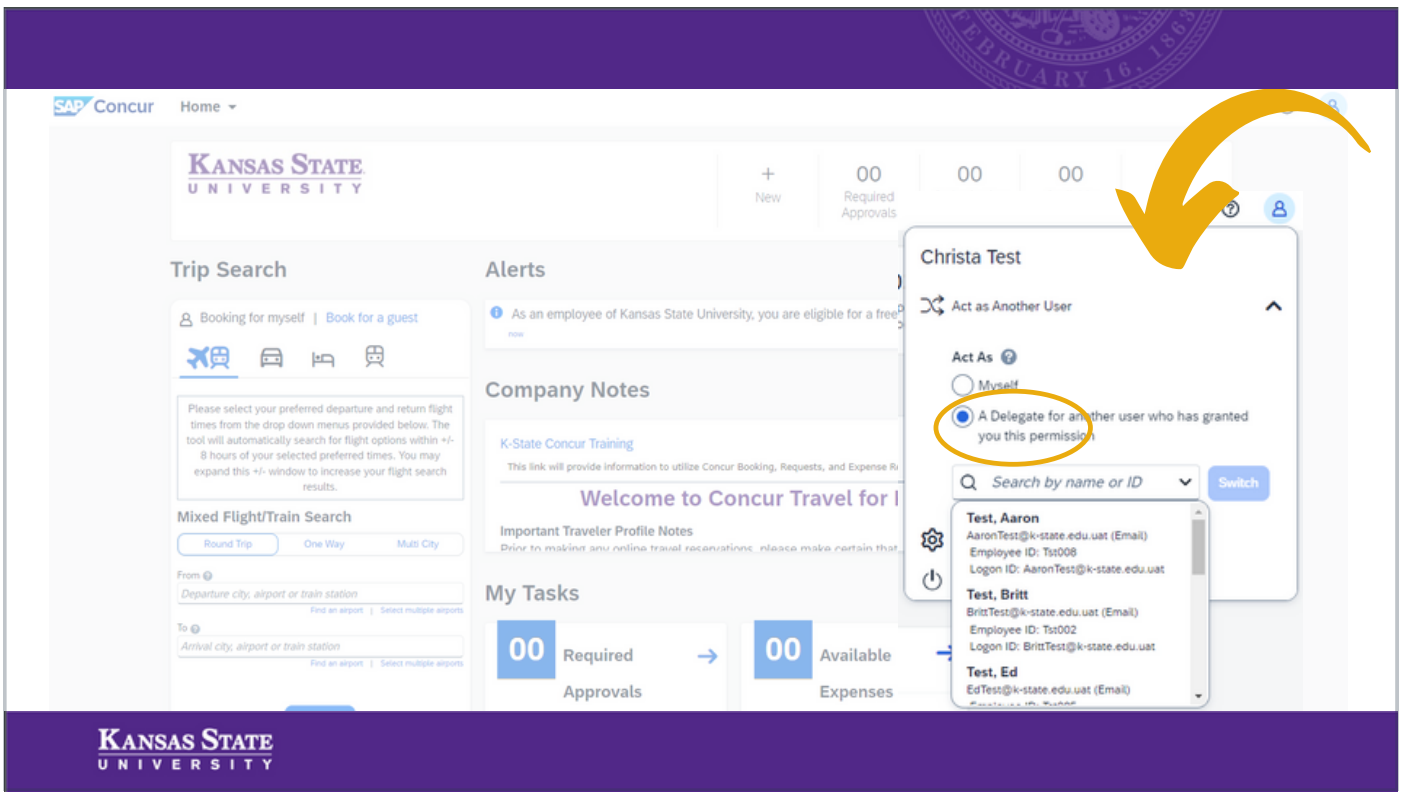


It is possible for either travelers or their delegates to create and prepare requests. Only the traveler, however, can submit the requests because the traveler has to be the person to agree to the User Submit Agreement which acts as an electronic signature on the request. If you are the traveler, you want to start on the home page dashboard.





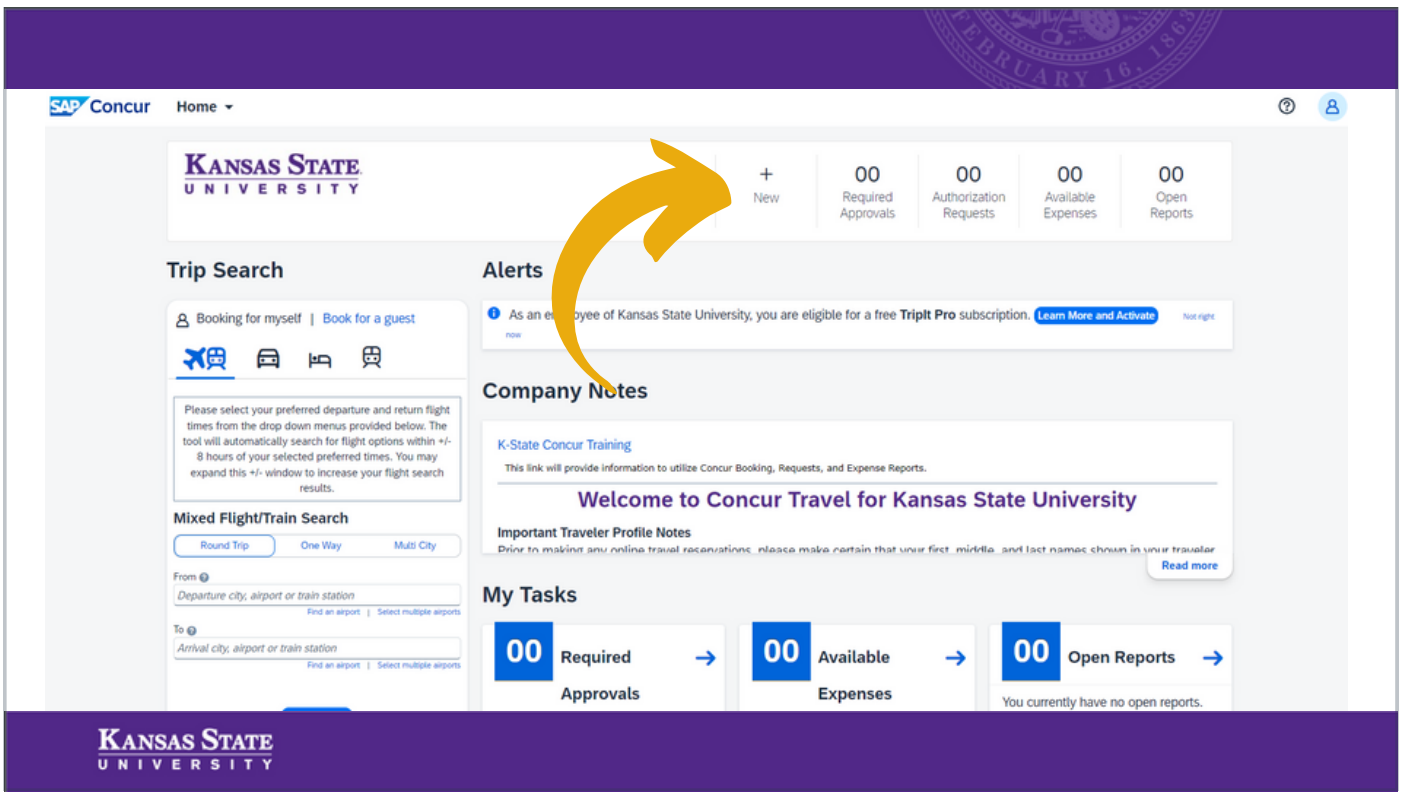
If you are a delegate acting on behalf of a traveler, you want to switch to that traveler's profile by clicking on the profile icon and selecting Act as Another User,



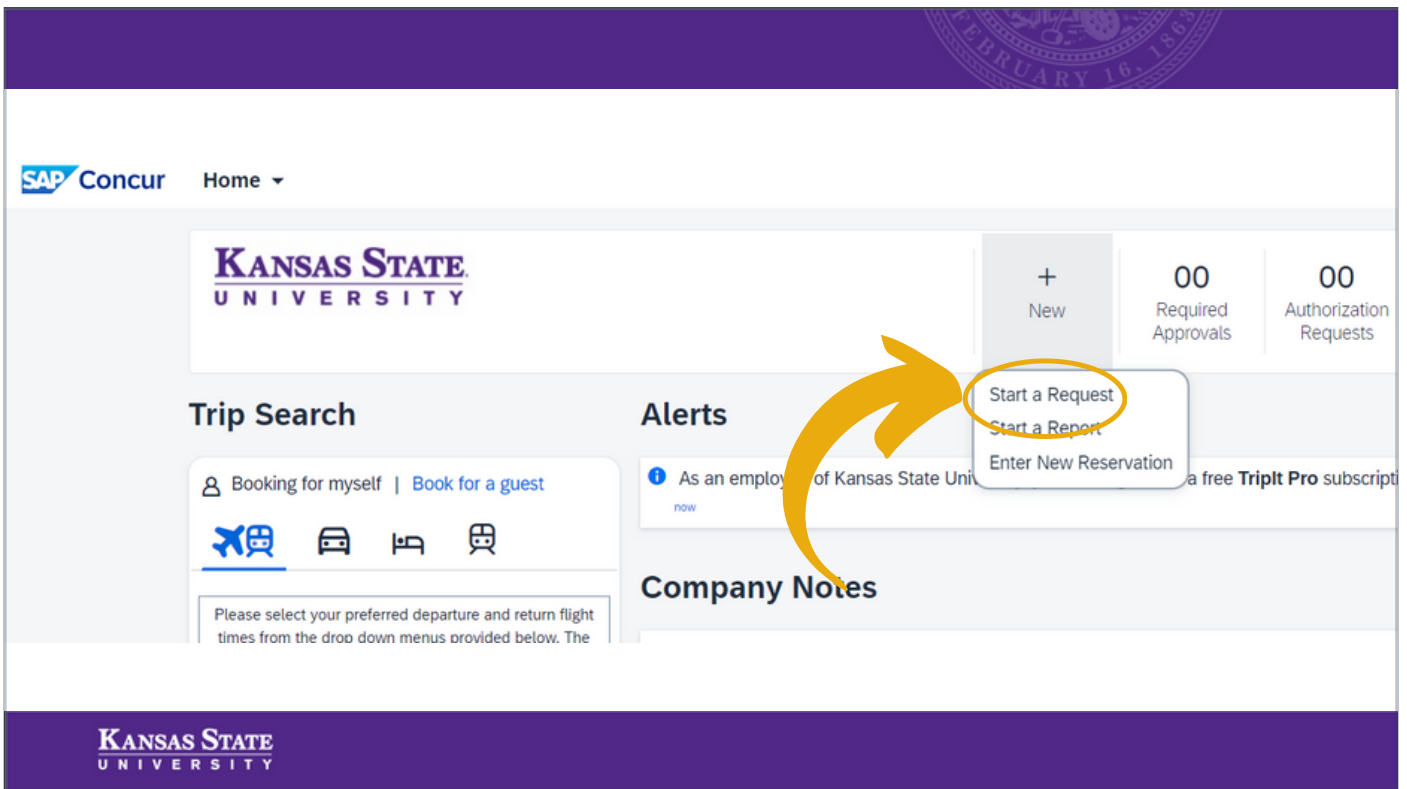
Then checking the delegate box and searching for and selecting the appropriate person,

The screenshot displays the SAP Concur user interface for a user named Christa Test. The interface includes a top navigation bar with the SAP Concur logo and a home button. Below the navigation bar, there are several sections: Trip Search, Alerts, Company Notes, and My Tasks. The Trip Search section includes options for booking for myself or a guest, and a Mixed Flight/Train Search section. The Alerts section shows a notification about eligibility for a free Tript Pro. The Company Notes section includes a link for K-State Concur Training. The My Tasks section shows 00 Required Approvals, 00 Available Expenses, and 00 Open Reports. A dropdown menu is open in the top right corner, titled 'Christa Test'. The menu includes an 'Act as Another User' option, which is currently selected. Below this, there are two radio button options: 'Myself' and 'A Delegate for another user who has granted you this permission'. A search box is present, containing the text 'Test, Nick', and a blue 'Switch' button is located to the right of the search box. A yellow arrow points to the 'Switch' button.

And then clicking Switch.



At this point, if you are the traveler, you'll see at the top center of the home page dashboard a plus sign with the word New underneath it.



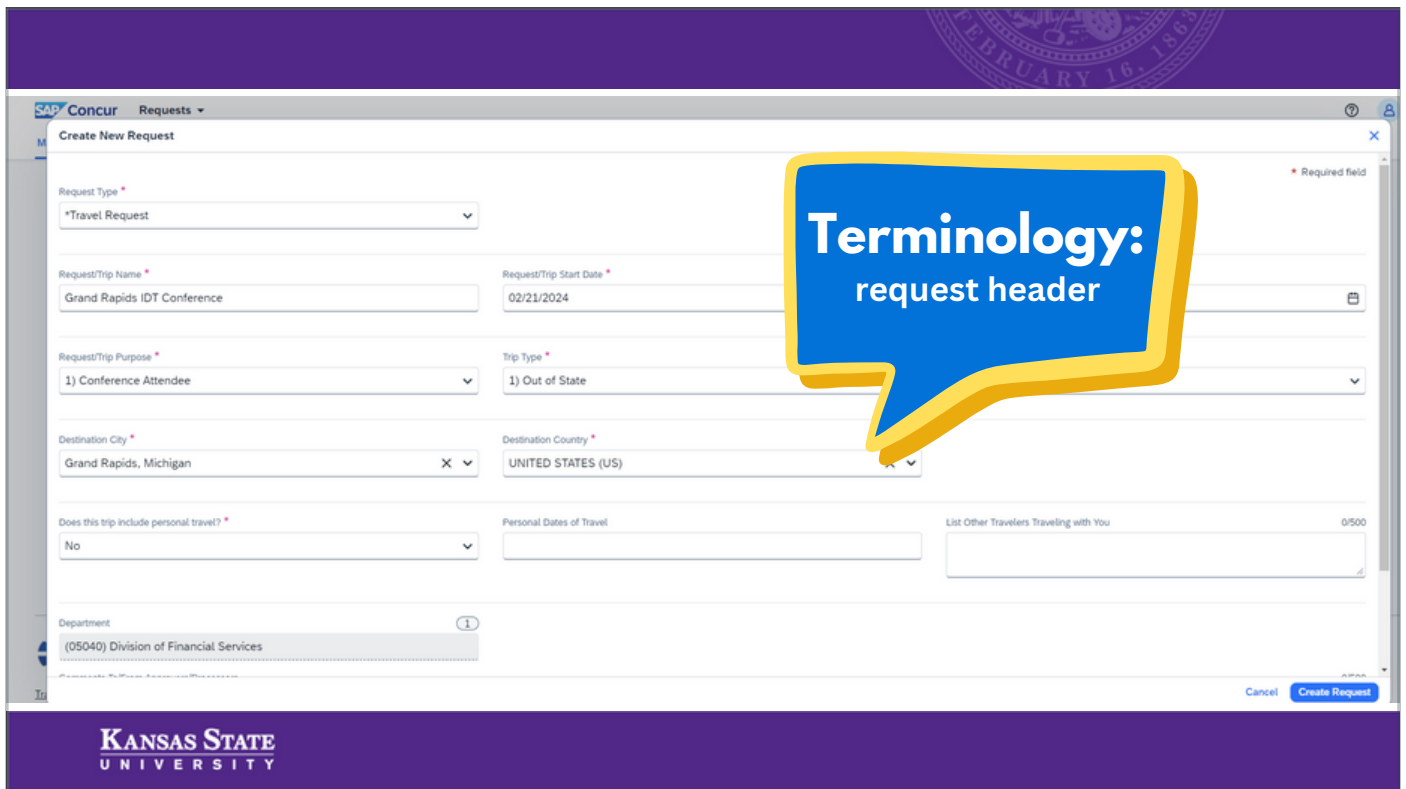
Hover here and select start a request. If you're the delegate, instead of seeing the New tab, you'll just see a tab that says Start a Request.

The screenshot shows the SAP Concur 'Create New Request' interface. At the top, there is a purple header with the Kansas State University logo and the text 'FEBRUARY 16, 1863'. Below the header, the SAP Concur logo and 'Requests' menu are visible. The main form area is titled 'Create New Request' and contains several sections of input fields:

- Request Type:** A dropdown menu with the selected option '\*Travel Request'.
- Request/Trip Name:** A text input field containing 'Grand Rapids IDT Conference'.
- Request/Trip Start Date:** A date picker field showing '02/21/2024'.
- Request/Trip End Date:** A date picker field showing '02/23/2024'.
- Request/Trip Purpose:** A dropdown menu with the selected option '1) Conference Attendee'.
- Trip Type:** A dropdown menu with the selected option '1) Out of State'.
- Traveler Type:** A dropdown menu with the selected option '2) Staff'.
- Destination City:** A dropdown menu with the selected option 'Grand Rapids, Michigan'.
- Destination Country:** A dropdown menu with the selected option 'UNITED STATES (US)'.
- Does this trip include personal travel?:** A dropdown menu with the selected option 'No'.
- Personal Dates of Travel:** An empty text input field.
- List Other Travelers Traveling with You:** An empty text input field with a character limit of 0/500.
- Department:** A dropdown menu with the selected option '(05040) Division of Financial Services'.

At the bottom right of the form, there are 'Cancel' and 'Create Request' buttons. The bottom of the page features a purple footer with the 'KANSAS STATE UNIVERSITY' logo.

You will see a screen that looks like this.



Concur refers to the details on this screen as the request header. The request header screen disappears after you fill in the details and create the request, but you can always get back to the request header screen to view or edit it

SAP Concur Requests ▾

Manage Requests

## September Conference \$391.48

Pending Travel Approval | Request ID: 336K

Request Details ▾ Print/Share ▾ Attachments ▾

- Request **EXPENSES**
- Request Header
- Request Timeline
- Audit Trail

Details↑↓

Personal Car Mileage Manhattan, KS, USA - El Dorado, KS 67042, USA

**KANSAS STATE UNIVERSITY**

under the Request Details dropdown menu on the main request page—which we will get to in a moment.



The screenshot shows the SAP Concur 'Create New Request' form. The form is titled 'Create New Request' and is for a 'Travel Request'. The fields are as follows:

- Request Type \***: \*Travel Request
- Request/Trip Name \***: Grand Rapids IDT Conference
- Request/Trip Start Date \***: 02/21/2024
- Request/Trip Purpose \***: 1) Conference Attendee
- Trip Type \***: 1) Out of State
- Traveler Type \***: 2) Staff
- Destination City \***: Grand Rapids, Michigan
- Destination Country \***: UNITED STATES (US)
- Does this trip include personal travel? \***: No
- Personal Dates of Travel**: (empty)
- List Other Travelers Traveling with You**: (empty)
- Department**: (05040) Division of Financial Services

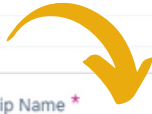
A yellow arrow points to a red asterisk icon next to the 'Request/Trip Start Date' field, which is labeled '\* Required field'.

All fields on the header marked with a red asterisk are required fields. Fill them out with the trip details applicable to the travel you are requesting.



**Create New Request**

Request Policy \*  
\*Domestic Travel Request

Request/Trip Name \*  Request/Trip Start Date \* MM/DD/YYYY Request/Trip End Date \* MM/DD/YYYY

**Request/Trip Name \***  
**[Location] [Purpose] (e.g., Grand Rapids IDT Conference)**

Traveler Type \*  
None Selected

Does this trip include personal travel? \*  
None Selected

Personal Dates of Travel

Additional Information

Comments To/From Approvers/Processors

Cancel **Create Request**

**KANSAS STATE UNIVERSITY**

For the Request/Trip Name, the name should clearly identify the location and purpose of the trip you are making—Grand Rapids IDT Conference, for example.



**Create New Request**

Request Policy \*  
\*Domestic Travel Request

Request/Trip Name \* Request/Trip Start Date \* MM/DD/YYYY Request/Trip End Date \* MM/DD/YYYY

Request/Trip Purpose \* None Selected Trip Type \* None Selected Traveler Type \* None Selected

Destination City \* Destination Country \*

**Destination City \***  
primary destination

Additional Information

Comments To/From Approvers/Processors

Cancel Create Request

**KANSAS STATE UNIVERSITY**

The Destination City field is the primary destination of your travel—the location of the main purpose of your travel.



**Create New Request**

Request Policy \*  
\*Domestic Travel Request

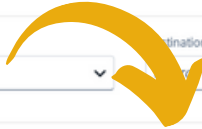
Request/Trip Name \* Request/Trip Start Date \*  
MM/DD/YYYY

Request/Trip Purpose \* Trip Type \*  
None Selected None Selected

Destination City \* Destination Country \*  
by Country/Region

Does this trip include personal travel? \* Personal Dates of Travel

None Selected



The Personal Dates of Travel field is a free-text field.

The image shows a web form titled "Create New Request" with a purple header and footer. The header features the Kansas State University seal and the date "FEBRUARY 16, 1863". The form includes several required fields marked with an asterisk (\*):

- Request Policy: \*Domestic Travel Request
- Request/Trip Name: (empty text field)
- Request/Trip Start Date: MM/DD/YYYY (calendar icon)
- Request/Trip End Date: MM/DD/YYYY (calendar icon)
- Request/Trip Purpose: None Selected
- Trip Type: None Selected
- Traveler Type: None Selected
- Destination City: (empty text field)
- Destination Country: Search by Country/Region (dropdown menu)
- Does this trip include personal travel?: None Selected
- Personal Dates of Travel: October 26, 2023 (text field)
- Additional Information: (empty text area)
- Comments To/From Approvers/Processors: (empty text area)

A yellow arrow points from the "Does this trip include personal travel?" dropdown to the "Personal Dates of Travel" field. The "Personal Dates of Travel" field contains the text "October 26, 2023". At the bottom right of the form are "Cancel" and "Create Request" buttons. The footer contains the "KANSAS STATE UNIVERSITY" logo.

This allows you to enter a single date,

**Create New Request**

Request Policy \*  
\*Domestic Travel Request

Request/Trip Name \*  
Request/Trip Start Date \*  
MM/DD/YYYY  
Request/Trip End Date \*  
MM/DD/YYYY

Request/Trip Purpose \*  
None Selected  
Trip Type \*  
None Selected  
Traveler Type \*  
None Selected

Destination City \*  
Destination Country \*  
Search by Country/Region

Does this trip include personal travel? \*  
None Selected  
Personal Dates of Travel  
Additional Information

Comments To/From Approvers/Processors  
**October 26-27, 2023**

Cancel Create Request

**KANSAS STATE UNIVERSITY**

a range of dates

Request Policy \*  
Domestic Travel Request

Request/Trip Name \*  
Request/Trip Start Date \* MM/DD/YYYY  
Request/Trip End Date \* MM/DD/YYYY

Request/Trip Purpose \*  
None Selected  
Trip Type \*  
None Selected  
Traveler Type \*  
None Selected

Origin City \*  
Destination Country \*  
Search by Country/Region

Does this trip include personal travel? \*  
None Selected  
Personal Dates of Travel  
Additional Information

Personal Dates of Travel  
10/25/2023, 10/27/2023

Comments To/From Approvers/Processors

Cancel Create Request

KANSAS STATE UNIVERSITY

or multiple individual dates as needed.

The screenshot shows the SAP Concur 'Create New Request' form. The form is titled 'Create New Request' and includes the following fields:

- Request Type:** \*Travel Request
- Request/Trip Name:** Grand Rapids IDT Conference
- Request/Trip Start Date:** 02/21/2024
- Request/Trip End Date:** 02/23/2024
- Request/Trip Purpose:** 1) Conference Attendee
- Trip Type:** 1) Out of State
- Traveler Type:** 2) Staff
- Destination City:** Grand Rapids, Michigan
- Destination Country:** UNITED STATES (US)
- Does this trip include...:** No
- Personal Dates of Travel:** (empty)
- List Other Travelers Traveling with You:** 0/500
- Department:** (05040) Division of Financial Services

A yellow arrow points to the Department field. The form also includes 'Cancel' and 'Create Request' buttons at the bottom right.

You will notice a department field near the bottom of the header. This field is sourced from the traveler's primary department on file within HRIS. It is an information field only and cannot be changed.



SAP Concur Requests

Create New Request

Request Type \*  
\*Travel Request

Request/Trip Name \*  
Grand Rapids IDT Conference

Request/Trip Start Date \*  
02/21/2024

Request/Trip End Date \*  
02/23/2024

Request/Trip Purpose \*  
1) Conference Attendee

Trip Type \*  
1) Out of State

Traveler Type \*  
2) Staff

Destination City \*  
Grand Rapids, Michigan

Destination Country \*  
UNITED STATES (US)

Does this trip include personal travel? \*  
No

Personal Dates of Travel

List Other Travelers Traveling with You 0/500

Department  
(05040) Division of Financial Services

Cancel Create Request

KANSAS STATE UNIVERSITY

When all required fields—and any additional fields if necessary—are complete, click the Create Request button in the bottom right corner.



SAP Concur Requests

Manage Requests Process Requests

Home / Requests / Manage Requests / Grand Rapids IDT Conference


### Grand Rapids IDT Conference

Not Submitted | Request ID: 333D

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

#### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)



No Expected Expenses  
Add expected expenses and/or travel plans to this request to submit for approval.

**KANSAS STATE UNIVERSITY**

The main request screen I mentioned earlier will appear. This screen allows you to manage the request.

## Grand Rapids IDT Conference

Not Submitted | Request ID: 336K

[Request Details](#) ▾

[Print/Share](#) ▾

[Attachments](#) ▾

[Manage Travel Allowance](#) ▾

### EXPECTED EXPENSES

[Attach Documents](#)

[Add](#)

[Edit](#)

[Delete](#)

[Allocate](#)

You can attach documents pertaining to the travel request if necessary, such as a conference agenda, the International Travel Registration, or the cost comparison worksheet.



Manage Requests

## Grand Rapids IDT Conference

Not Submitted | Request ID: 336K



[Request Details ▾](#)

[Print/Share ▾](#)

[Attachments ▾](#)

[Manage Travel Allowance ▾](#)

### EXPECTED EXPENSES

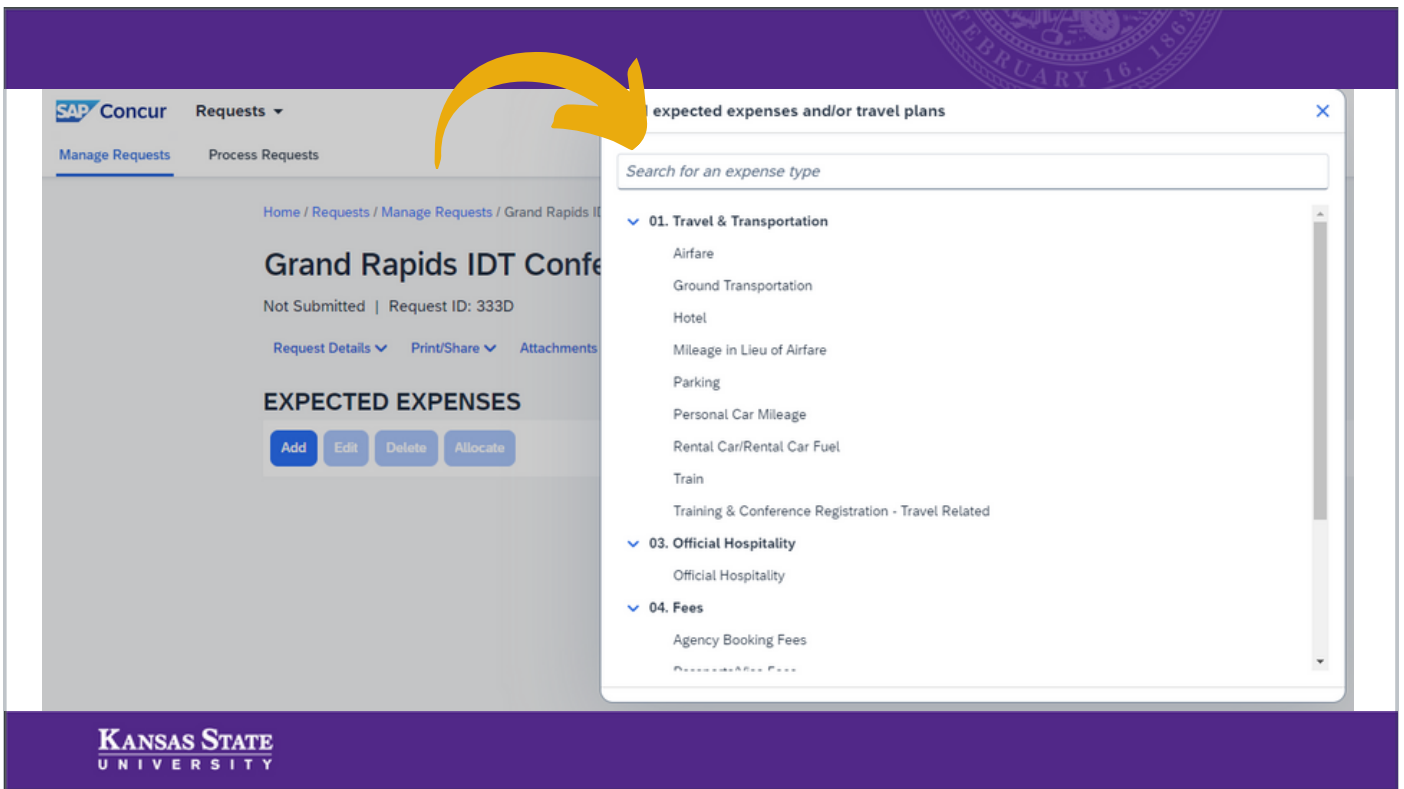
Add

Edit

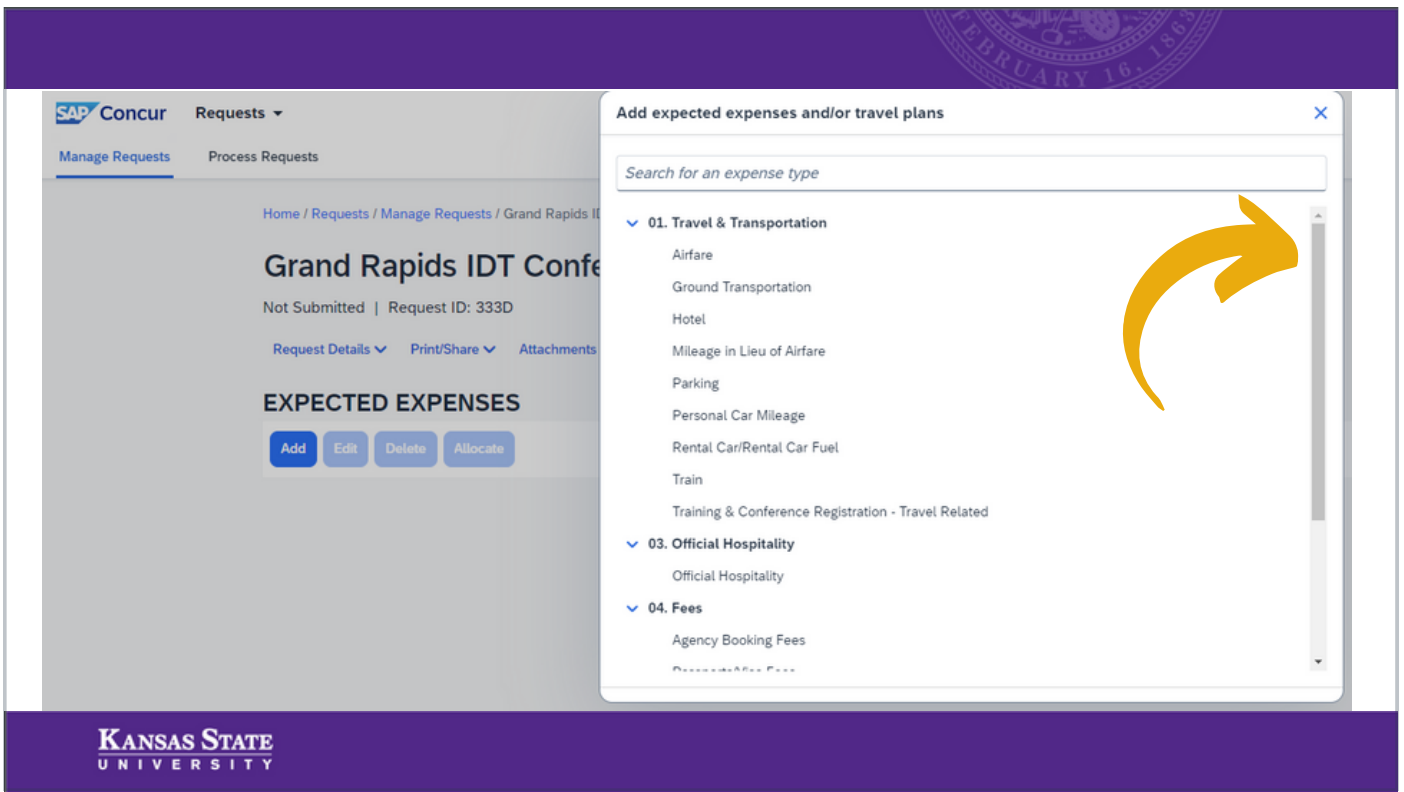
Delete

Allocate

And you can add expected expenses to the travel request by clicking the Add button.



A screen will appear allowing you to search for the type of expense you wish to add. Something to note! Because these are expected expenses only on a travel request, not all expense types are listed—just primary expenses.



You can also search the list of expenses by scrolling with the scroll bar on the right.



Home / Requests / Manage Requests / Grand Rapids IDT Conference / New Expense: Airfare

## New Expense: Airfare

Cancel **Save**

Allocate

Request/Trip Start Date

02/21/2024

Request/Trip End Date

02/23/2024

City

Grand Rapids, Michigan

X v

Estimated Amount \*

Currency \*

US, Dollar

v

Comment

0/2000

**Save** Cancel

**KANSAS STATE**  
UNIVERSITY

Once you click on an expense type, a screen will appear with fields pertaining to that expense type. Fill in all required fields (marked with the red asterisk) and any additional fields that apply.



Home / Requests / Manage Requests / Grand Rapids IDT Conference / New Expense: Airfare

## New Expense: Airfare

02/21/2024

Allocate

Request/Trip Start Date

02/21/2024

Request/Trip End Date

02/23/2024

City

Grand Rapids, Michigan

X v

Estimated Amount \*

Comment

0/2000

Save

Cancel

**KANSAS STATE**  
UNIVERSITY

For the amount field, it's an estimated amount. Expenses on travel requests are expected expenses only and do not have to be exact.





Home / Requests / Manage Requests / Grand Rapids IDT Conference / New Expense: Airfare

## New Expense: Airfare

02/21/2024

Cancel Save

Allocate

Request/Trip Start Date

02/21/2024

Request/Trip End Date

02/23/2024

City

Grand Rapids, Michigan



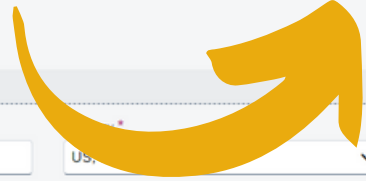
Estimated Amount \*

US

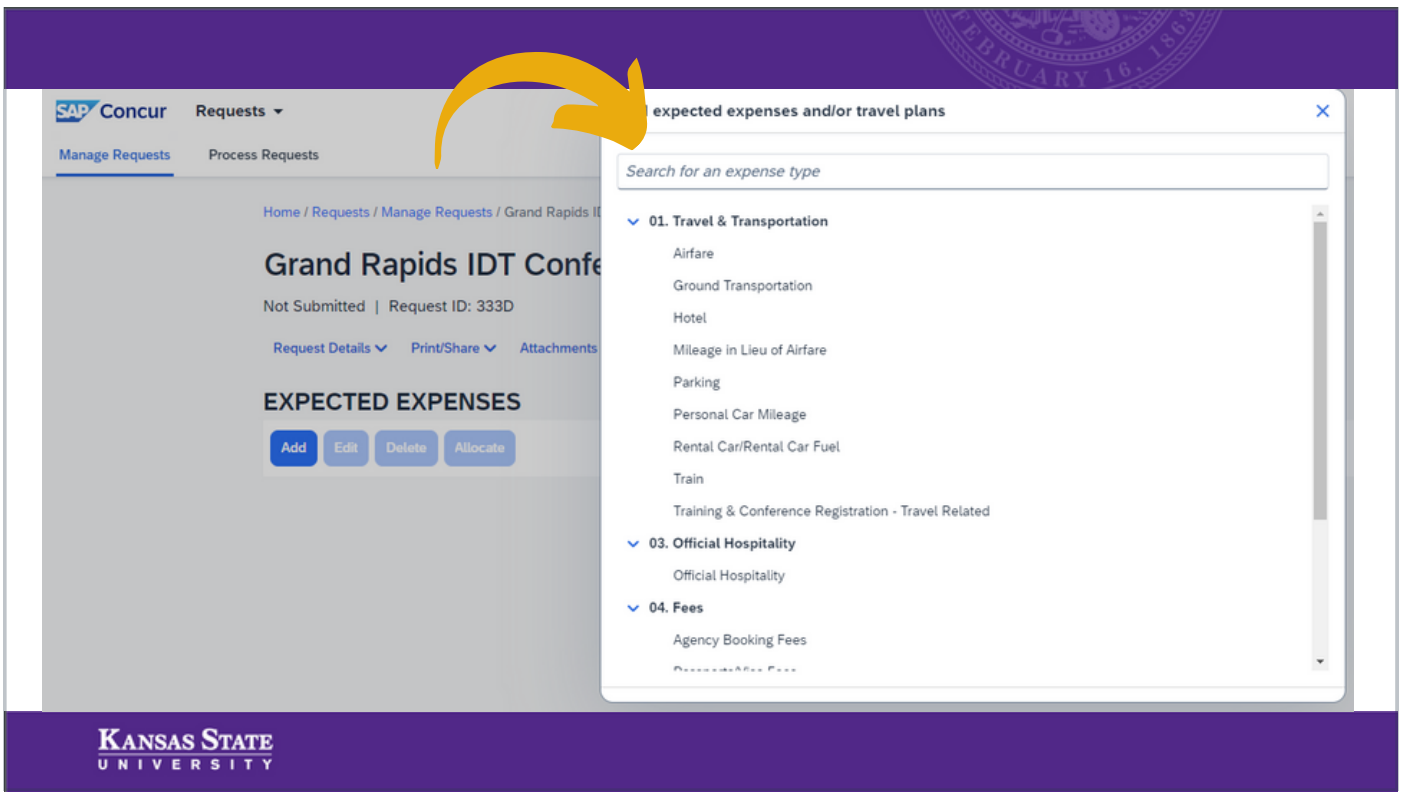
Comment

0/2000

Save Cancel



When the expense details are complete, click Save.



If there are other expenses associated with the travel request, search for those and repeat the steps to provide required data.



Home / Requests / Manage Requests / Grand Rapids IDT Conference

# Grand Rapids IDT Conference \$800

[More Actions](#) [Submit Request](#)

Sent Back to Employee | Request ID: 333D | [View Timeline](#)

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

[Add Travel Allowance](#)

## EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	\$500.00
<input type="checkbox"/>	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	\$300.00
					\$800.00

To add meal per diem, click on the Manage Travel Allowance dropdown menu and select Add Travel Allowance.

The screenshot shows the SAP Concur 'Travel Allowance' window. The title bar includes 'SAP Concur Requests' and a close button. The main content area is titled 'Itinerary' and contains the following fields:

- Itinerary Name \***: A text input field containing 'Grand Rapids IDT Conference'.
- Detailed Itinerary**: A checkbox that is currently unchecked.
- Without overnight**: A checkbox that is currently unchecked.
- Start Location \***: A dropdown menu with 'Enter City' selected.
- Start Date \***: A date input field containing '02/21/2024'.
- Start Time \***: A time input field containing '12:00 AM'.
- + Add Destination**: A blue link to add a new destination.
- Arrival Location \***: A dropdown menu with 'Enter City' selected.
- + Add Destination**: A blue link to add a new destination.
- End Location \***: A dropdown menu with 'Enter City' selected.
- End Date \***: A date input field containing '02/23/2024'.
- End Time \***: A time input field containing '12:00 AM'.

At the bottom right of the window, there is a note: 'Next: Adjust your travel allowance' and two buttons: 'Cancel' and 'Next'. The bottom of the page features the 'KANSAS STATE UNIVERSITY' logo.

On the Travel Allowance window that opens, enter the locations and estimated start and end times of your travel.

The screenshot shows the SAP Concur 'Travel Allowance' interface. At the top, there is a purple header with the text 'SAP Concur Requests' and a circular seal on the right containing the text 'FEBRUARY 16, 1863'. Below the header, the page title is 'Travel Allowance' and the sub-section is 'Itinerary'. The form contains the following fields:

- Itinerary Name \***: A text input field containing 'Grand Rapids IDT Conference'. To its right are two checkboxes: 'Detailed Itinerary' and 'Without overnight', both currently unchecked.
- Start Location \***: A dropdown menu with 'Enter City' selected.
- Start Date \***: A date input field containing '02/21/2024'.
- Start Time \***: A time input field containing '12:00 AM'.
- Arrival Location \***: A dropdown menu with 'Enter City' selected.
- End Location \***: A dropdown menu with 'Enter City' selected.
- End Date \***: A date input field containing '02/23/2024'.
- End Time \***: A time input field containing '12:00 AM'.

At the bottom right of the form, there is a text prompt 'Next: Adjust your travel allowance' and two buttons: 'Cancel' and 'Next'. A large yellow arrow points from the right side of the form towards the 'Next' button. The bottom of the page features a purple footer with the 'KANSAS STATE UNIVERSITY' logo.

Then click Next.

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you... always refer to your company policy guidelines.

View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Allowance Limit	Reimbursement Amount
All Days Dates: 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Thu, 02/22/2024 Grand Rapids, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$175.50	\$32.00
<b>Total:</b>						<b>\$175.50</b>	<b>\$32.00</b>

Back Cancel Finish

**KANSAS STATE UNIVERSITY**

On the next screen you'll see the allowance limit and current reimbursement amount totals. The allowance is determined by federal per diem rates according to university policy. It is calculated as 150% of the hotel rate plus the maximum allowable rate for meals and incidental expenses.

SAP Concur Requests - Travel Allowance Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stay overnight with friends or family. Days can be excluded from your allowance for personal leave. Always refer to your company policy guidelines.

View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Limit	Reimbursement Amount
All Days Dates: 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Thu, 02/22/2024 Grand Rapids, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$175.50	\$20.81
<b>Total:</b>						<b>\$175.50</b>	<b>\$20.81</b>

Back Cancel Finish

KANSAS STATE UNIVERSITY

Check the box or boxes for any meals or lodging provided at no cost to you or for any personal days. The totals will automatically recalculate to show the new calculated maximum allowable rate.

SAP Concur Requests


### Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Allowance Limit	Reimbursement Amount
All Days Dates: 1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Thu, 02/22/2024 Grand Rapids, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$175.50	\$20.81
<b>Total:</b>						<b>\$175.50</b>	<b>\$20.81</b>



Back Cancel Finish

KANSAS STATE UNIVERSITY

When all travel allowance details are complete, click the Finish button in the bottom right corner.





Home / Requests / Manage Requests / Grand Rapids IDT Conference

## Grand Rapids IDT Conference \$820.81

[More Actions](#) [Submit Request](#)

[Sent Back to Employee](#) | [Request ID: 333D](#) | [View Timeline](#)

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#)



<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested	
<input type="checkbox"/>	Travel Allowances	Grand Rapids, Michigan	02/22/2024	\$20.81	\$20.81	▼
<input type="checkbox"/>	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	\$500.00	
<input type="checkbox"/>	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	\$300.00	
					<b>\$820.81</b>	

The travel allowance will now show on the list of expected expenses.



Home / Requests / Manage Requests / Grand Rapids IDT Conference

## Grand Rapids IDT Conference \$800.00

[Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 333D

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	\$500.00
<input type="checkbox"/>	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	\$300.00
					\$800.00

Once all request details are complete, you are ready to submit the request. Remember that only the traveler, not a delegate, can submit.



Requests ▾

Process Requests

[Home](#) / [Requests](#) / [Manage Requests](#) / [Grand Rapids II](#)

## Grand Rapids IDT Confere

Not Submitted | Request ID: 333D

[Request Details](#) ▾ [Print/Share](#) ▾ [Attachments](#)

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

Expense type↓↑

[Details](#)↓↑

#### User Submit Agreement: ✕

By clicking on the 'Accept & Continue' button, I certify that:

This is a true and accurate estimation of expenses that will be incurred to accomplish official business for Kansas State University. The travel will be completed by the lowest reasonable cost and will comply with all Kansas State University policies. If estimated lodging rates exceed base allowable lodging rates per Kansas State University policy, I understand documentation substantiating the excess amount must be supplied with expense report.

Approval does not necessarily mean that the total estimated expenses may be claimed for reimbursement. Reimbursement is made in accordance with applicable regulations and can be determined only after the travel voucher has been processed by Financial Services and the State Division of Accounts and Reports.

[Cancel](#)

[Accept & Continue](#)

Review and acknowledge the terms of the electronic submission.

The screenshot displays a web interface for managing requests. A modal window titled "User Submit Agreement:" is open, containing the following text:

By clicking on the 'Accept & Continue' button, I certify that:

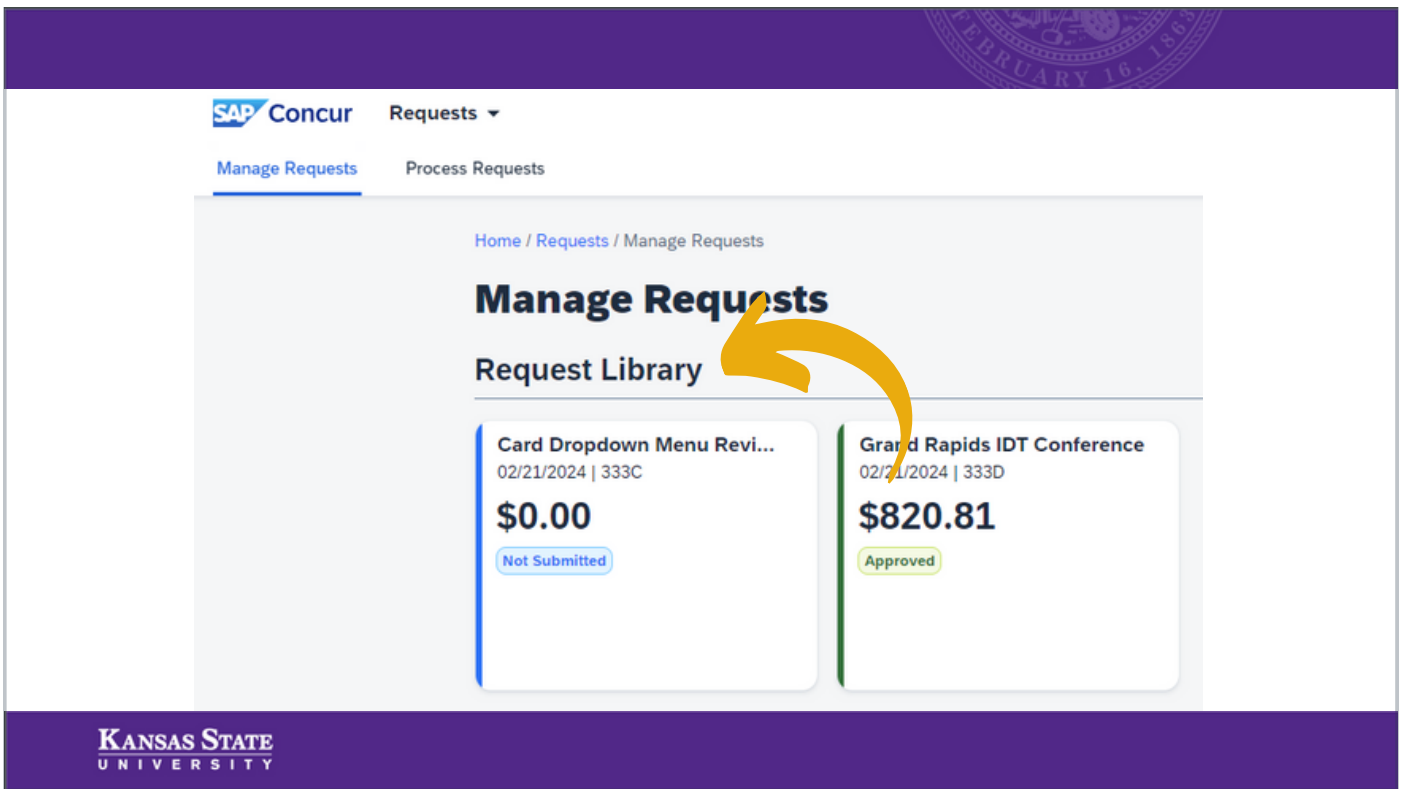
This is a true and accurate estimation of expenses that will be incurred to accomplish official business for Kansas State University. The travel will be completed by the lowest reasonable cost and will comply with all Kansas State University policies. If estimated lodging rates exceed base allowable lodging rates per Kansas State University policy, I understand documentation substantiating the excess amount must be supplied with expense report.

Approval does not necessarily mean that the total estimated expenses may be claimed for reimbursement. Reimbursement is made in accordance with applicable regulations and can be determined only after the travel voucher has been processed by Financial Services and the State Division of Accounting.

At the bottom of the modal, there are two buttons: "Cancel" and "Accept & Continue". A large yellow arrow points from the text in the modal to the "Accept & Continue" button.

The background page shows a breadcrumb trail: Home / Requests / Manage Requests / Grand Rapids IDT Conference. The main heading is "Grand Rapids IDT Conference". Below it, it says "Not Submitted | Request ID: 333D". There are links for "Request Details", "Print/Share", and "Attachments". A section titled "EXPECTED EXPENSES" has buttons for "Add", "Edit", "Delete", and "Allocate". Below this is a table with a header "Expense type" and a "Details" column.

Clicking Accept and Continue serves as your electronic signature.



The request is now submitted and will show on your Requests page in the Request Library. This library shows all requests that are currently open, including requests you have not yet submitted, those you have submitted that are pending approval, those that have been returned to you by an approver for correction, and those that are fully approved.



Home / Requests / Manage Requests

## Manage Requests

### Request Library

<p>Card Dropdown Menu Revi...</p> <p>02/21/2024   333C</p> <p><b>\$0.00</b></p> <p>Not Submitted</p>	<p>Grand Rapids IDT Conference</p> <p>02/21/2024   333D</p> <p><b>\$820.8</b></p> <p>Submitted</p>
--	--



The status of the request will show on the request box,



SAP Concur Requests ▾

Manage Requests

### Manage Requests

Request Library View Active Requests ▾ [Create New Request](#)

September Conference  
09/25/2023 | 336K  
**\$391.48**  
Submitted

Pending Travel Supervisor Approval  
Test, Nick

September Conference  
09/25/2023 | 336K  
**\$391.48**  
Submitted

Pending Travel Supervisor Approval  
Test, Nick

And if the request is in the process of being approved, you can see where it is in the approval process at the bottom of the request box. And that's the process of creating a travel request.

The image shows a screenshot of the SAP Concur 'Create New Request' form. The form is titled 'Create New Request' and has a close button (X) in the top right corner. A yellow arrow points to the 'Request Type' dropdown menu, which is currently set to '\*Credit Card Request'. The dropdown menu is open, showing two options: '\*Credit Card Request' and '\*Travel Request'. The form includes several required fields, indicated by an asterisk (\*): 'Request Type', 'Request Date' (with a date picker icon and the format MM/DD/YYYY), 'Phone Number to Use for Fraud Verification', 'User Type' (currently set to 'None Selected'), and 'Card Product Type' (currently set to 'None Selected'). The 'Department' field is pre-filled with '(90001) Test Department 1' and has a '1' in a circle next to it. At the bottom right, there are 'Cancel' and 'Create Request' buttons. The SAP Concur logo and 'Requests' dropdown are visible in the top left. The Kansas State University logo is at the bottom left.

The card request is almost exactly the same.



SAP Concur Requests ▾

Manage Requests

Home / Requests / Manage Requests / Card Example 0116

**Card Example 0116**

Not Submitted | Request ID: 33QR

Request Details ▾ Attachments ▾

**EXPECTED EXPENSES**

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

**No Expected Expenses**  
Add expected expenses and/or travel plans to this request to submit for approval.

**KANSAS STATE**  
UNIVERSITY

It's even going to still say Expected Expenses because of Concur's prototype for the request form—but you're not adding expenses on the card request. You're adding details of the card request.

SAP Concur Requests ▾

Manage Requests

Home / Requests / Manage Requests / Card Example 0116

## Card Example 0116

Not Submitted | Request ID: 33QR

Request Details ▾ Attachments ▾

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

Search for an expense type

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease
- 4) Reissue/Replace Existing Card
- 5) Update Name

Card requests are submitted for new cards, for closing cards, for changing card limits, for replacing cards, and for updating the name on the card. You can learn the full card request process through our Creating Card Requests training video.



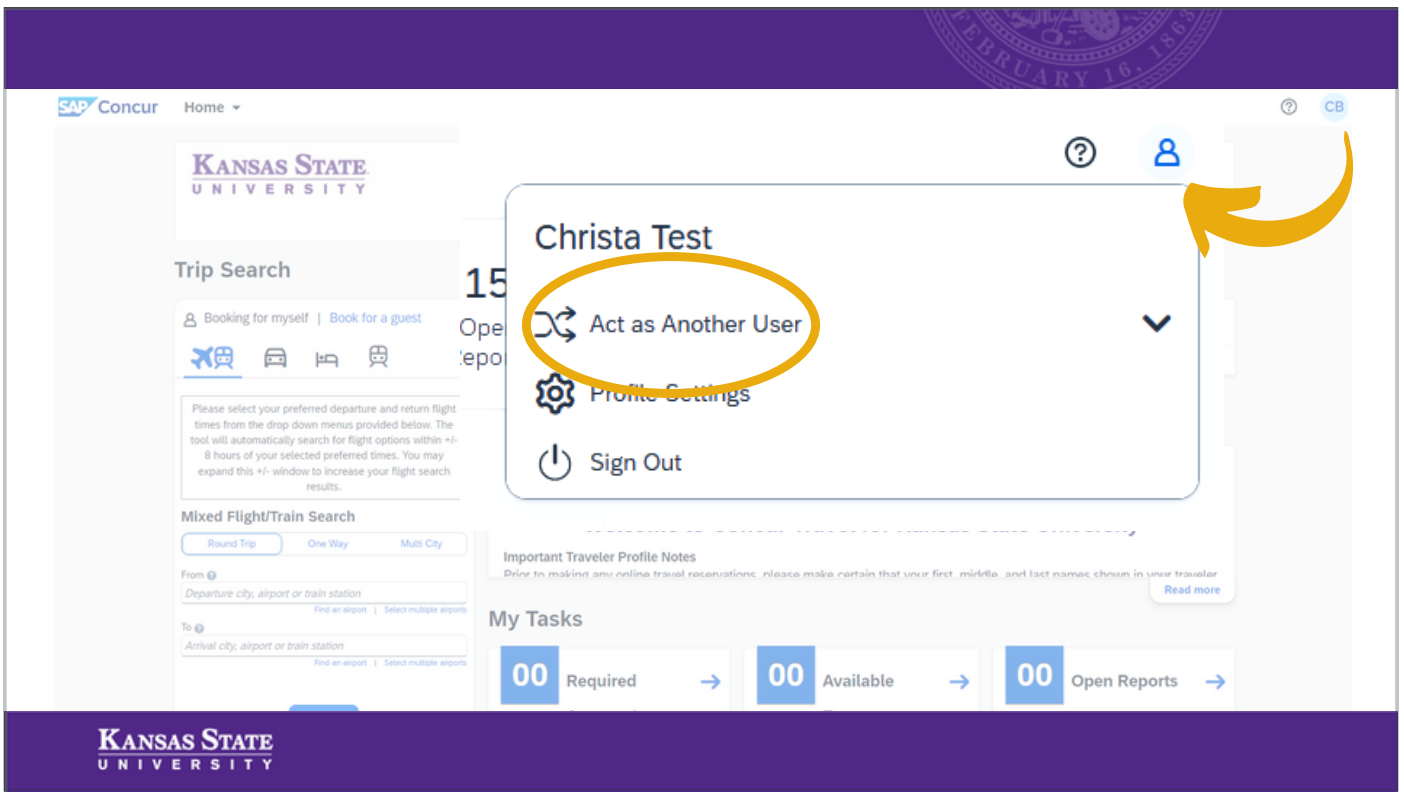
Do we have any questions on creating requests?



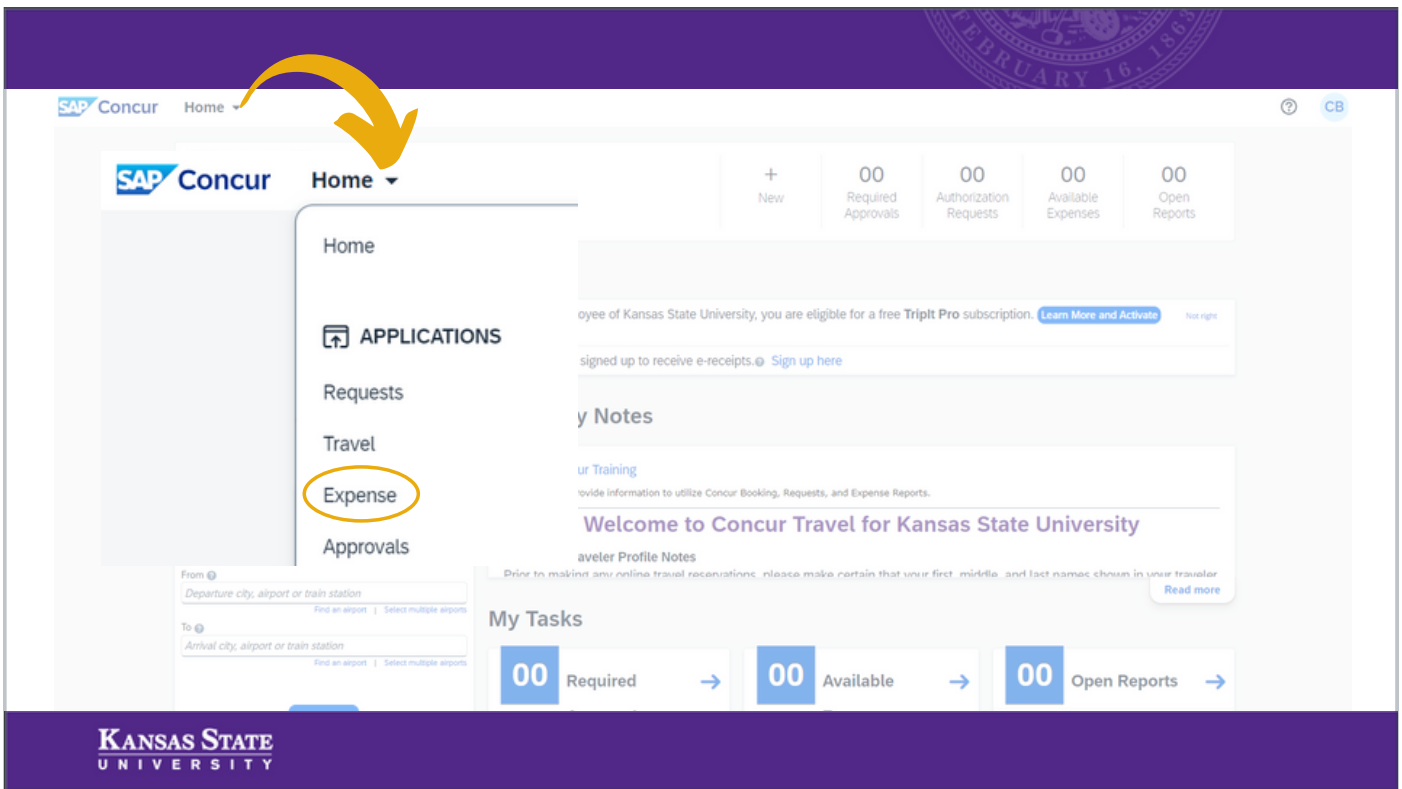
# Creating Expense Reports

**KANSAS STATE**  
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Once your travel request is created, submitted, and approved, the next step is to move on to the travel expense report. This process follows the same basic patterns as the travel request.



Remember if you are acting as a delegate for the traveler to make sure you switch to that traveler's profile.



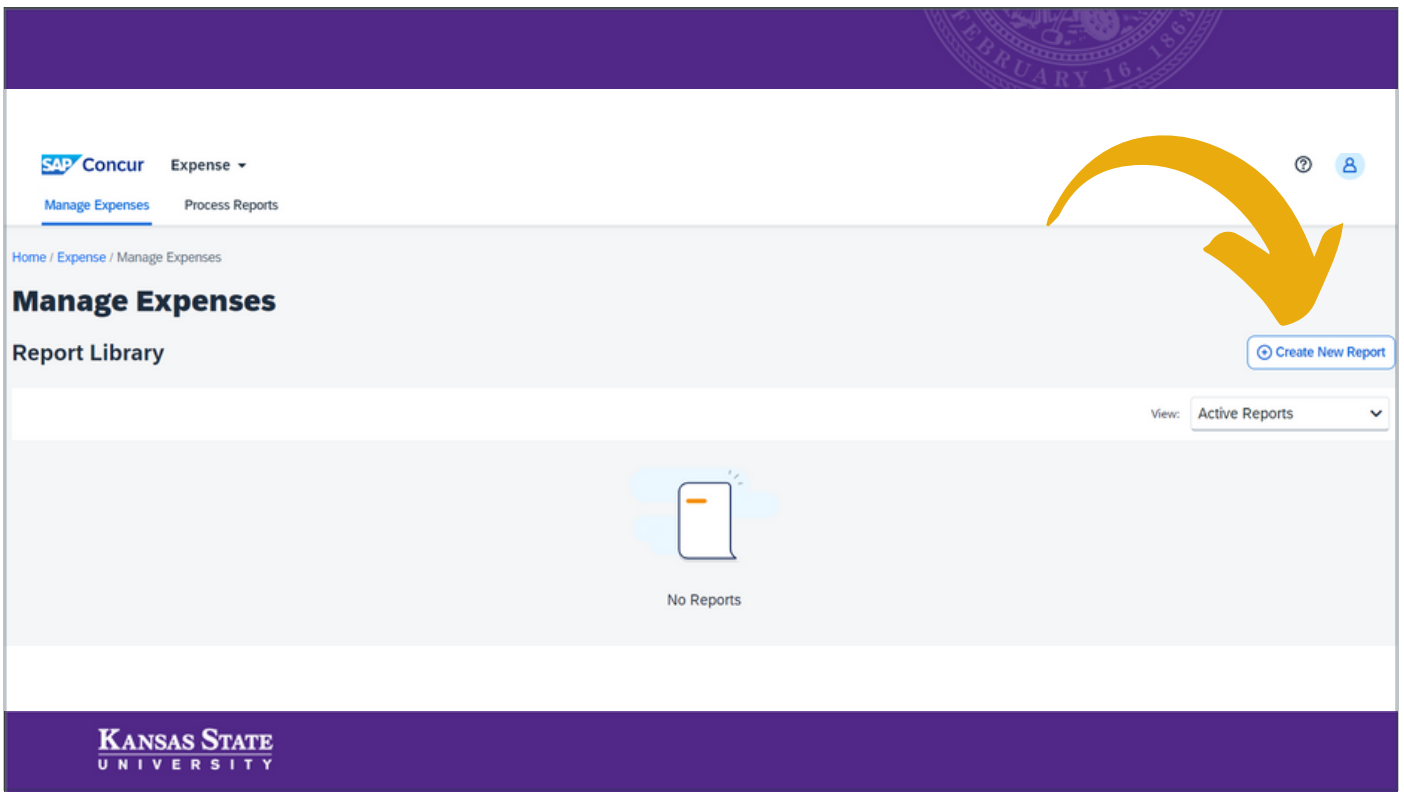
Whether you are the traveler or the delegate, to begin the expense report, on the dashboard screen, click on the page identifier dropdown menu and select Expense.

The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top left, the 'Expense' dropdown menu is circled in yellow, with a large yellow arrow pointing from it to the report cards below. The page title is 'Manage Expenses' and the breadcrumb is 'Home / Expense / Manage Expenses'. Below the title is a 'Report Library' section containing two report cards:

Report Title	Date	Amount	Status
Airfare Expense Review 0221	02/21/2024	\$25.68	Not Submitted
Grand Rapids IDT Conference	02/21/2024	\$820.81	Not Submitted

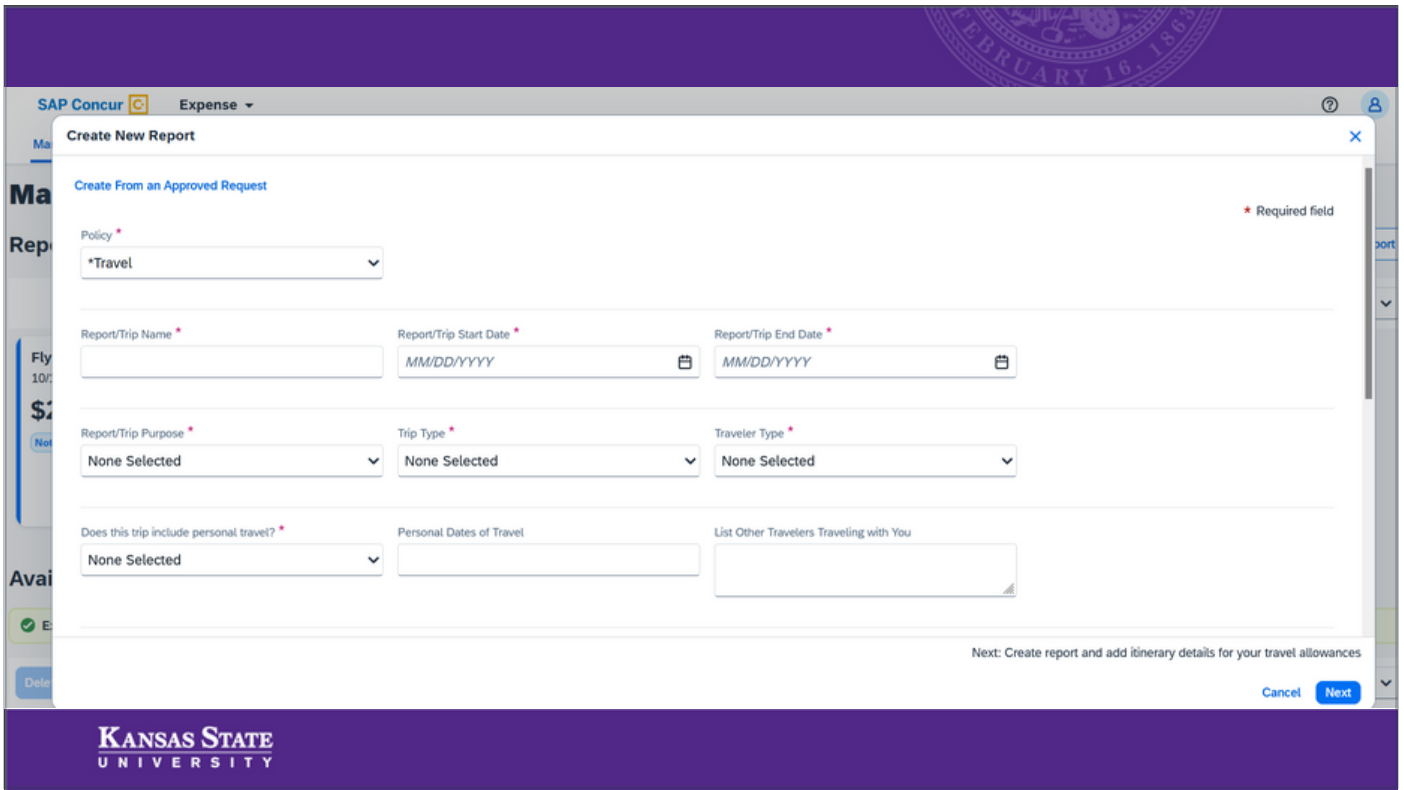
The bottom of the page features the Kansas State University logo.

If the travel required a request and the dates of travel fell within an immediate time period, look to see if the expense report auto-generated from the approved request.



If the travel did not require a request or the report did not auto-generate, click on Create New Report in the top right corner.





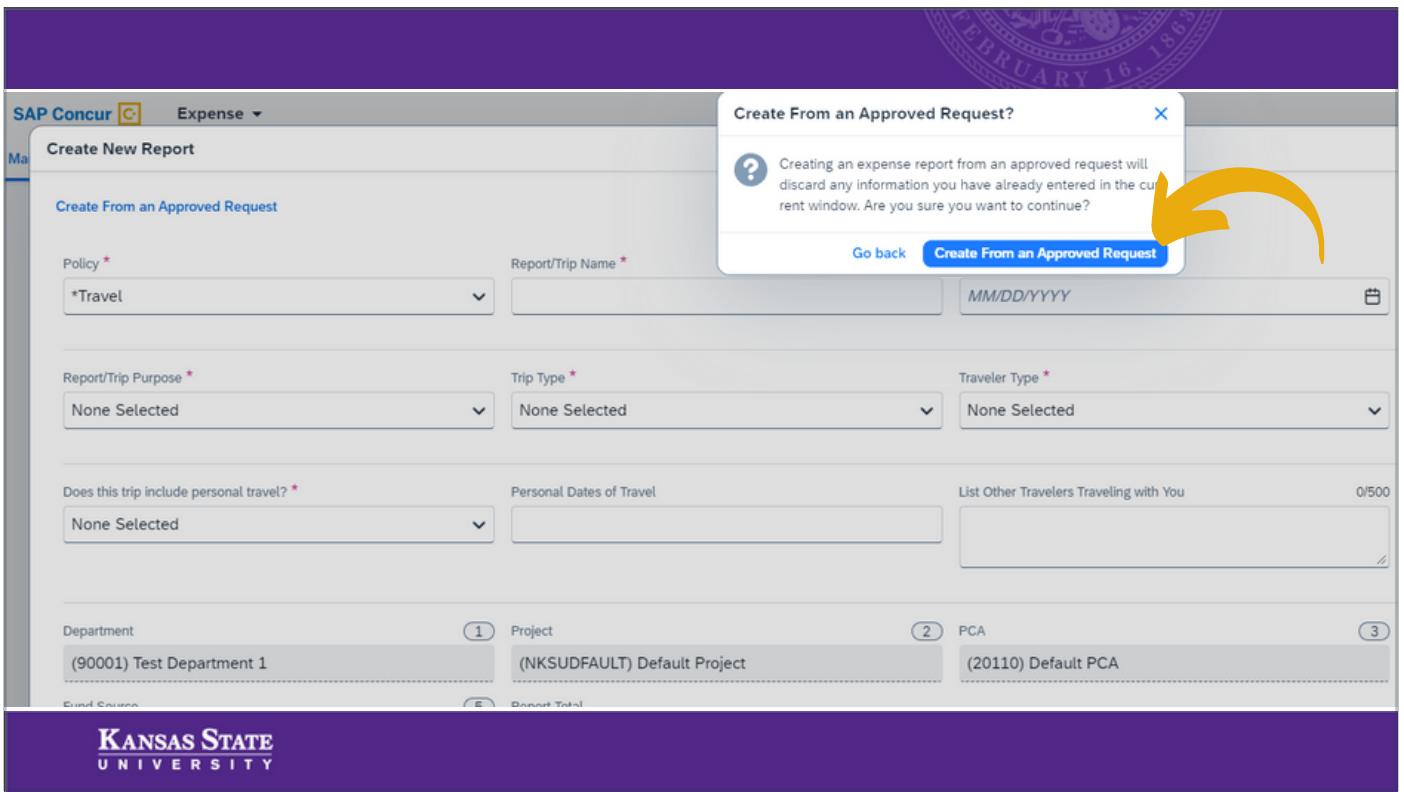
The report header will appear.

The screenshot shows the SAP Concur Expense 'Create New Report' form. At the top left, there is a blue link labeled 'Create From an Approved Request' with a yellow arrow pointing to it. The form contains several required fields marked with an asterisk (\*):

- Policy: \*Travel
- Report/Trip Name: (empty text box)
- Report/Trip Start Date: MM/DD/YYYY
- Report/Trip End Date: MM/DD/YYYY
- Report/Trip Purpose: None Selected
- Trip Type: None Selected
- Traveler Type: None Selected
- Does this trip include personal travel?: None Selected
- Personal Dates of Travel: (empty text box)
- List Other Travelers Traveling with You: (empty text box)

At the bottom right of the form, there are 'Cancel' and 'Next' buttons. A note at the bottom of the form reads: 'Next: Create report and add itinerary details for your travel allowances'. The background features the Kansas State University logo and the text 'KANSAS STATE UNIVERSITY'.

For travel that required an approved request prior to travel, you can create the travel expense report from the approved travel request by clicking on the blue Create from an Approved Request link at the top left of the screen.



A window will appear to inform you that creating the report from the approved travel request will discard any information entered on the report header screen so far. Confirm that you want to continue by clicking the Create from an Approved Request button.



Home / Expense / Manage Expenses / Grand Rapids IDT Conference

Alerts: 12

## Grand Rapids IDT Conference \$820.81

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>	✖		Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input type="checkbox"/>	✖		Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input type="checkbox"/>	✖	↑	Out of Pocket	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	...
<input type="checkbox"/>	✖	↑	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
							\$820.81	



You will see the main expense report screen.



Alerts: 12

## Grand Rapids IDT Conference \$820.81

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

**REQUEST**  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

<input type="checkbox"/>	Alerts	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>	✖	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input type="checkbox"/>	✖	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>	✖	Out of Pocket	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	...
<input type="checkbox"/>	✖	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
						\$820.81	



You can select any expenses pulled into the report from the travel request to edit them—because, remember, the request expenses were only estimates and need to be changed to reflect the exact amounts now—



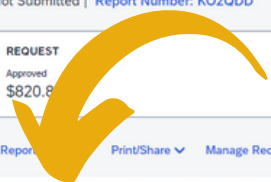
Alerts: 12

### Grand Rapids IDT Conference \$820.81

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

**REQUEST**  
Approved  
\$820.81

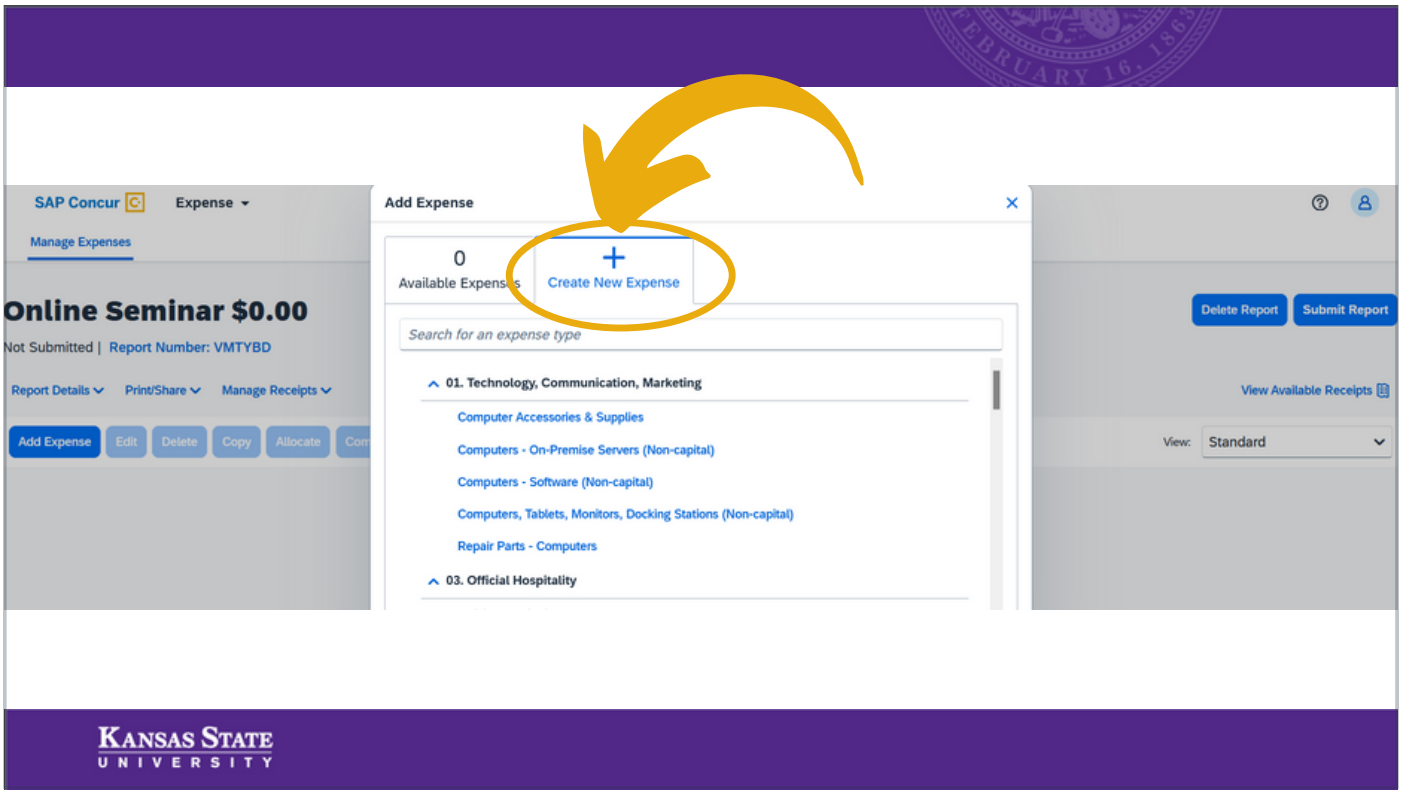


Report Print/Share Manage Receipts Travel Allowance View Available Receipts

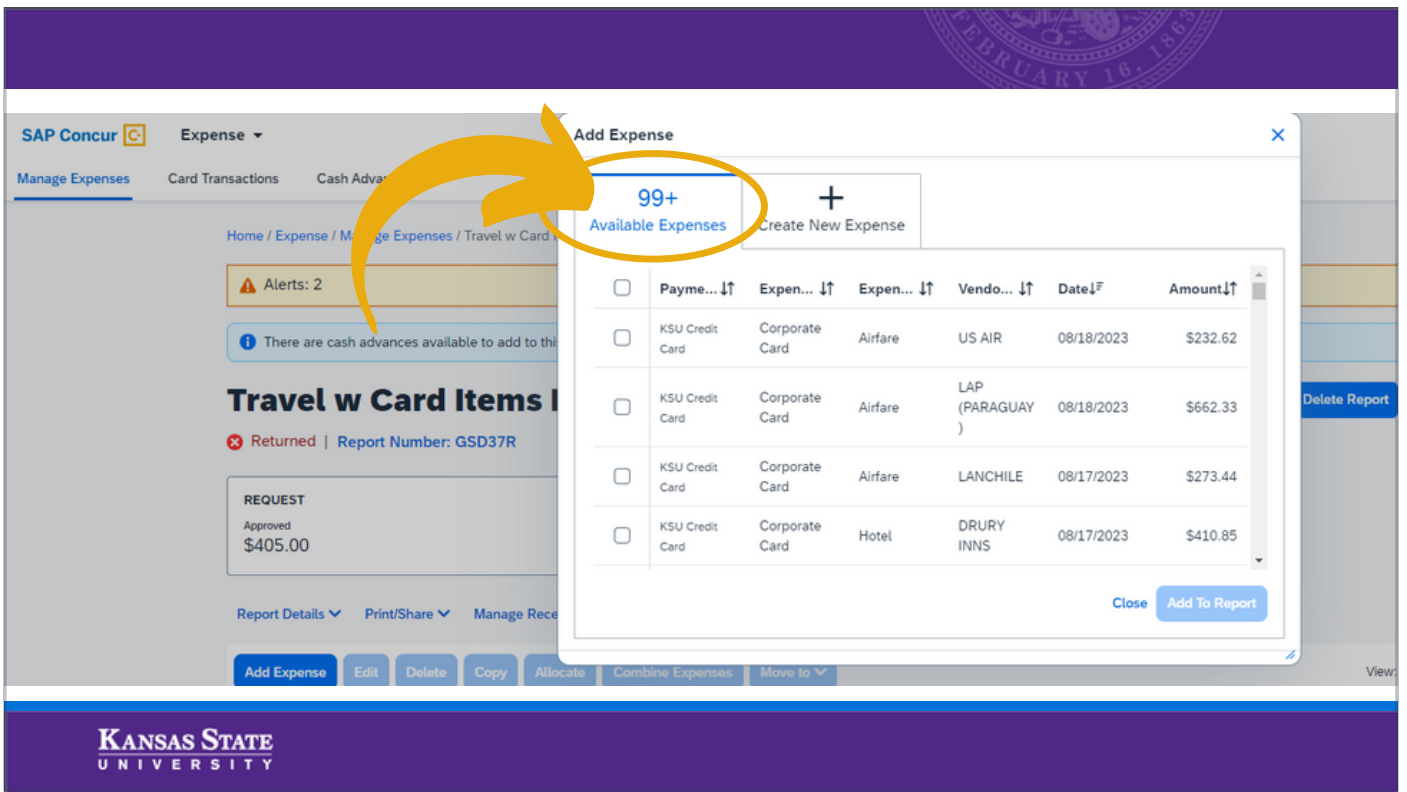
Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>	✖		Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input type="checkbox"/>	✖		Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>	✖	↑	Out of Pocket	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	...
<input type="checkbox"/>	✖	↑	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
							\$820.81	

or you can add new expenses to the report. There are two options in Concur for adding expenses in a report—



to create new out-of-pocket expenses



or to add available expenses. Available expenses will be one of two things:



## university credit card charges



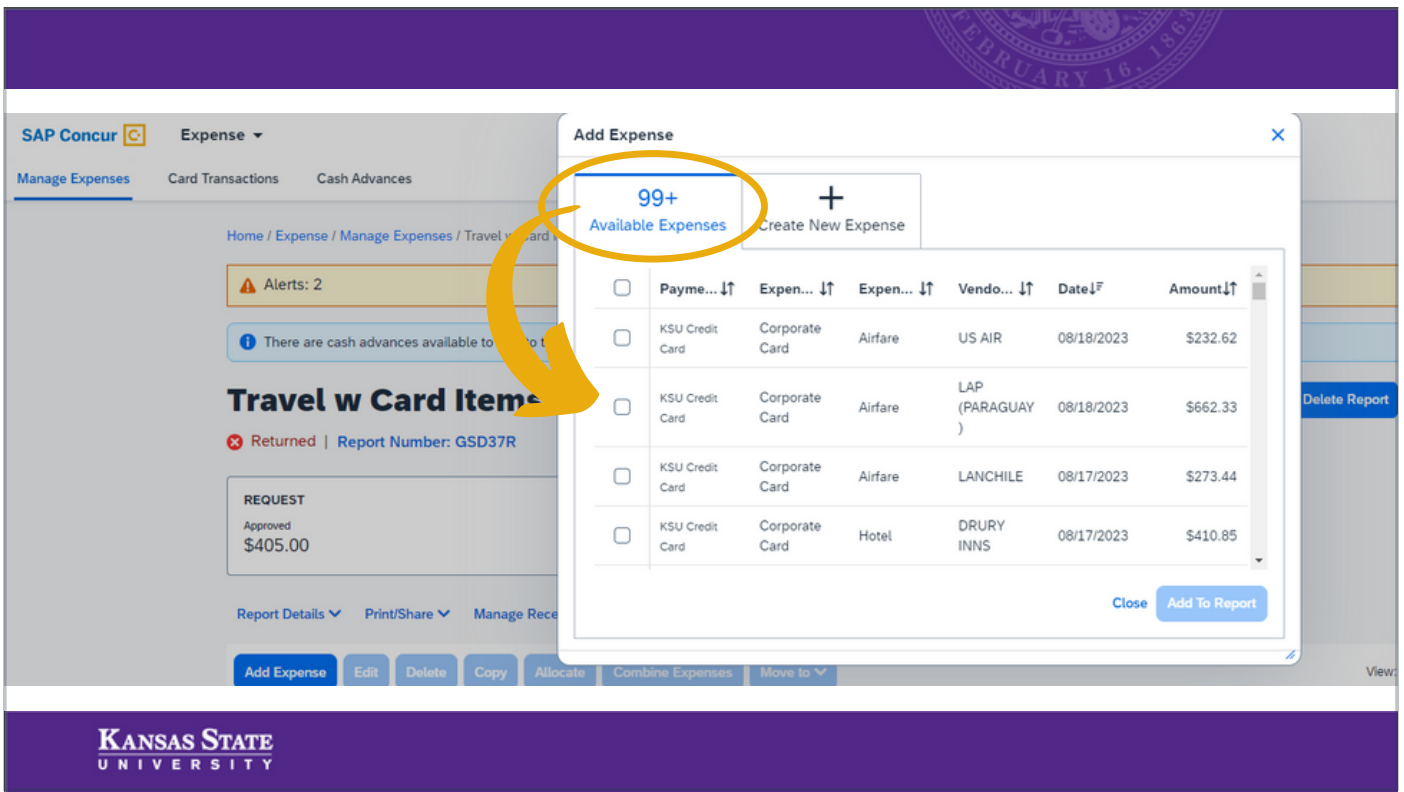
**KANSAS STATE**  
UNIVERSITY

credit card charges placed on your university card which are automatically fed into your Concur profile

**receipt-generated  
out-of-pocket expenses**



or out-of-pocket expenses generated through receipts you have imported into Concur. We will talk more about this in a few moments when we discuss receipts.



For expenses in the Available Expense list, select the expenses you wish to add by checking on the applicable boxes on the left side of the Available Expenses screen.

The screenshot shows the SAP Concur Expense management interface. The main page displays 'Travel w Card Items' with a 'Returned' status and a 'Report Number: GSD37R'. A 'REQUEST' box shows 'Approved \$405.00'. An 'Add Expense' modal window is open, showing a list of available expenses. A yellow arrow points to the 'Add To Report' button in the bottom right corner of the modal.

<input type="checkbox"/>	Payme... ↑↑	Expen... ↑↑	Expen... ↓↑	Vendo... ↓↑	Date ↓↑	Amount ↓↑
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	US AIR	08/18/2023	\$232.62
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	LAP (PARAGUAY )	08/18/2023	\$662.33
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	LANCHILE	08/17/2023	\$273.44
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Hotel	DRURY INNS	08/17/2023	\$5

Then click on Add to Report in the bottom right corner of the window.



Alerts: 12

## Grand Rapids IDT Conference \$820.81

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to


View: Standard

<input type="checkbox"/>	Alerts	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>	✖	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input type="checkbox"/>	✖	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>	✖	Out of Pocket	Hotel	Grand Rapids, Michigan	02/21/2024	\$300.00	...
<input type="checkbox"/>	✖	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
						\$820.81	





To edit the information for any of the expenses you selected, check the box for the expense and click the Edit button.

Details    Itemizations

 Allocate

\* Required field

 Expense Type \*  
Undefined ✕ ▼

 Report/Trip Purpose \*      Additional Information  
None Selected ▼

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Fields that are missing required information are highlighted in red,

The screenshot displays the SAP Concur Expense report interface. At the top, there is a navigation bar with 'SAP Concur' and 'Expense' dropdown. Below it, there are tabs for 'Manage Expenses', 'Card Transactions', and 'Cash Advances'. A section titled 'Alerts: 3' contains three alerts, with the first two circled in yellow: 'Missing required field: Report/Trip Purpose' and 'The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.' The main report title is 'Undefined \$614.59' with a 'Cancel' button. Below the title, there is a date '08/20/2023', a description 'AERO COACH AVAIATION', and a card type 'Corporate Card'. The interface is divided into 'Details' and 'Itemizations' tabs. Under 'Details', there is an 'Allocate' section with a dropdown menu for 'Expense Type' currently set to 'Undefined'. A 'Receipt' section is also visible on the right.

and the top of the screen will identify any alerts or warnings that require attention. Fill out all required and applicable fields, and resolve any alerts or warnings.

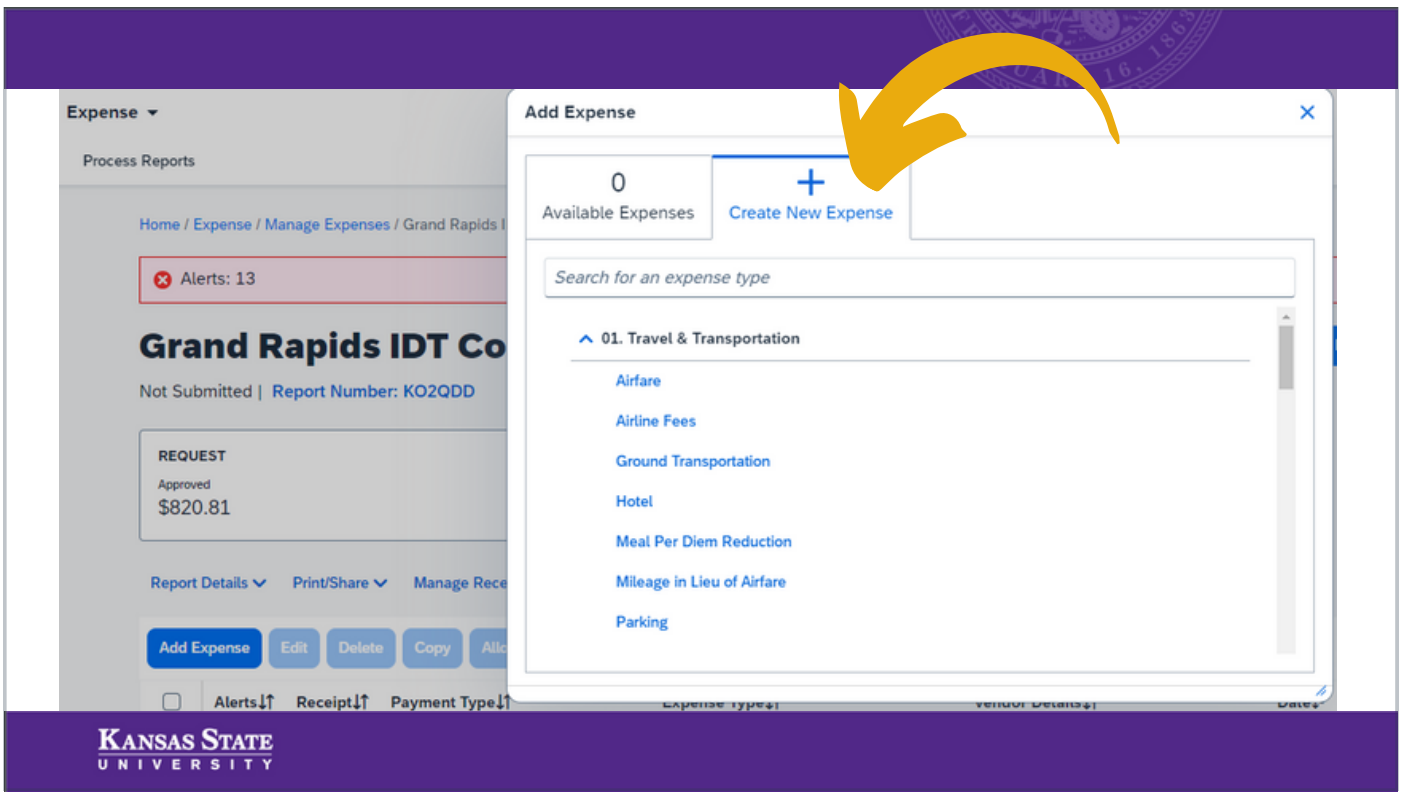
The screenshot shows the SAP Concur Expense interface. At the top, there's a navigation bar with 'SAP Concur' and 'Expense'. Below that, there are tabs for 'Manage Expenses', 'Card Transactions', and 'Cash Advances'. The main area displays 'Alerts: 3' with a filter 'All' and counts '2' (red X) and '1' (yellow triangle). Three alerts are listed: 'Missing required field: Report/Trip Purpose.', 'The entry has Undefined expense type. You must select an expense t', and 'You must attach a receipt image to this expense.'. Below the alerts, there's a summary for 'Undefined \$614.59' with date '08/20/2023', description 'AERO COACH AVAIIATION', and card type 'Corporate Card'. There are tabs for 'Details' and 'Itemizations', and an 'Allocate' button. At the bottom, there's a dropdown for 'Expense Type' with 'Undefined' selected. The Kansas State University logo is at the bottom left.

**Save rule alerts:**  
disappear on save

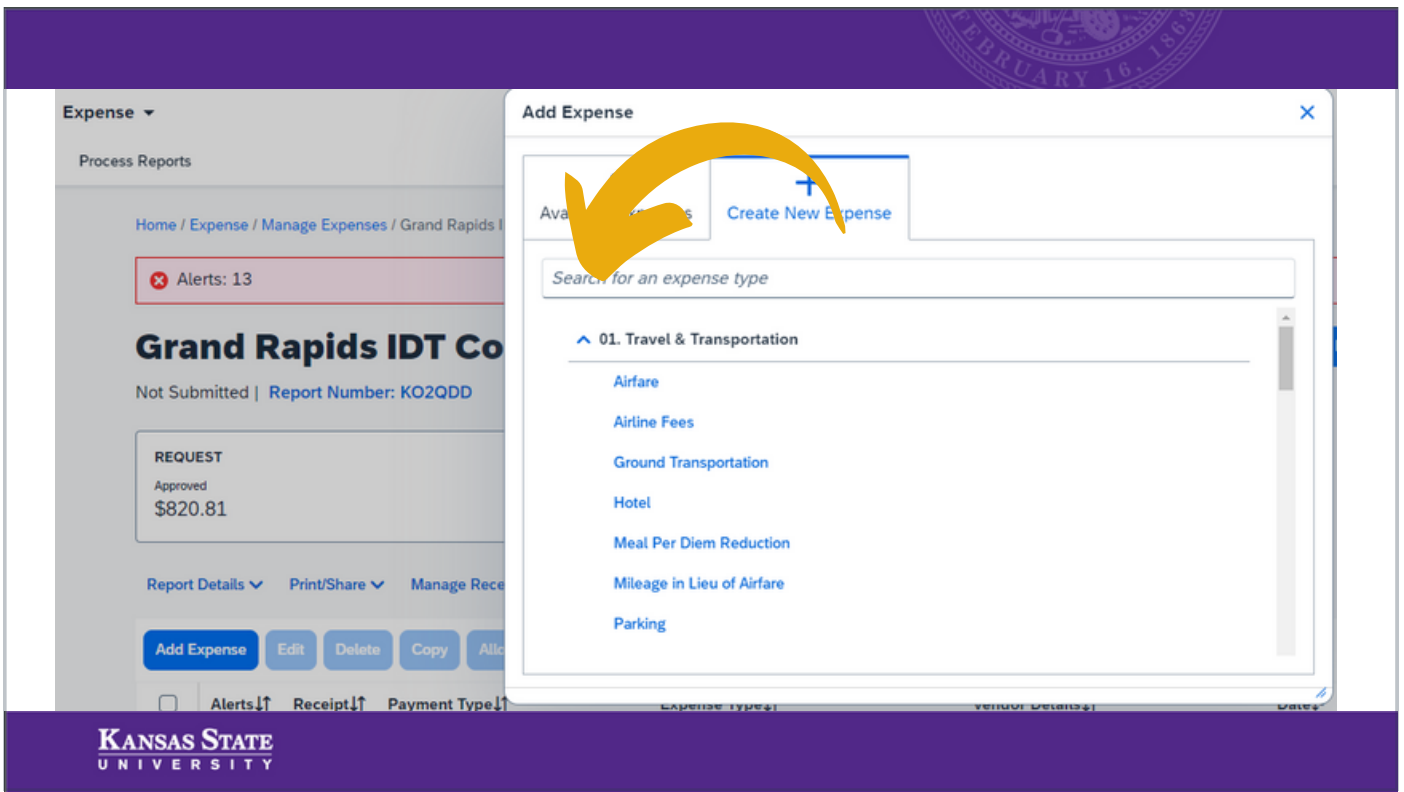
**Submit rule alerts:**  
show until submitted

It's important to note regarding resolving alerts and warnings that not all alerts and warnings resolve alike. Some resolve through a Save rule, so that once you click Save the alert or warning disappears. Other alerts and warnings resolve through a Submit rule, which means they don't disappear until after you submit the report.

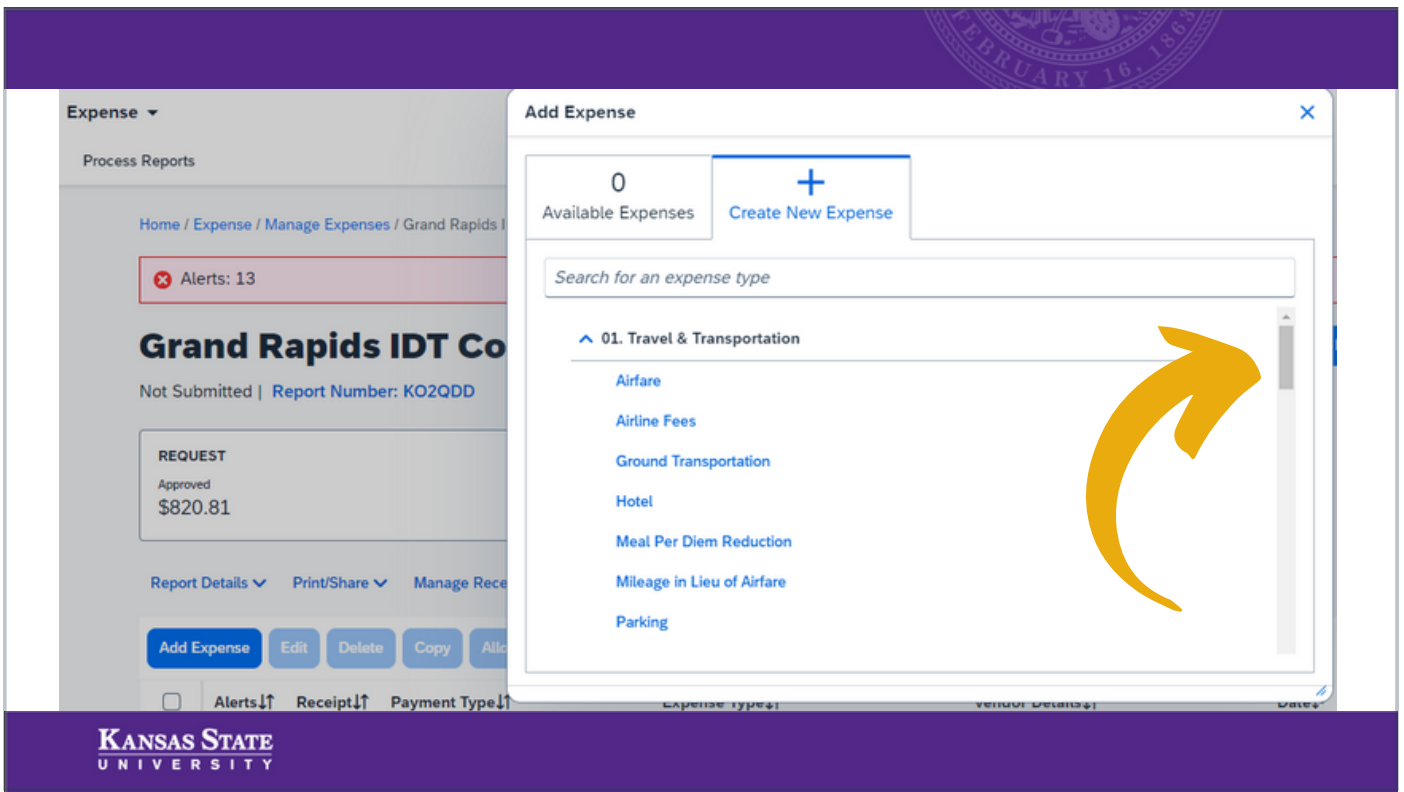




Now that we've added an available expense to the report, let's look at our other option: To add new out-of-pocket expenses. On the Add Expense screen, click the Create New Expense option.



We suggest searching for the expense type you wish to add in the search box,



You can also scroll through the list of expenses using the scroll bar on the right.



- Alerts: 5
- All 4 1
- Itemizations are required for this entry. [View](#)
  - Missing required field: Vendor.
  - ACTION: This report cannot be submitted until after the trip end date.
  - The transaction date of this entry is outside the date range of the associated itinerary.
  - You must attach a receipt image to this expense.

Hotel \$300.00 Cancel Delete Expense Save Expense

02/21/2024

Details Itemizations Hide Receipt

Expense Type \* \* Required field

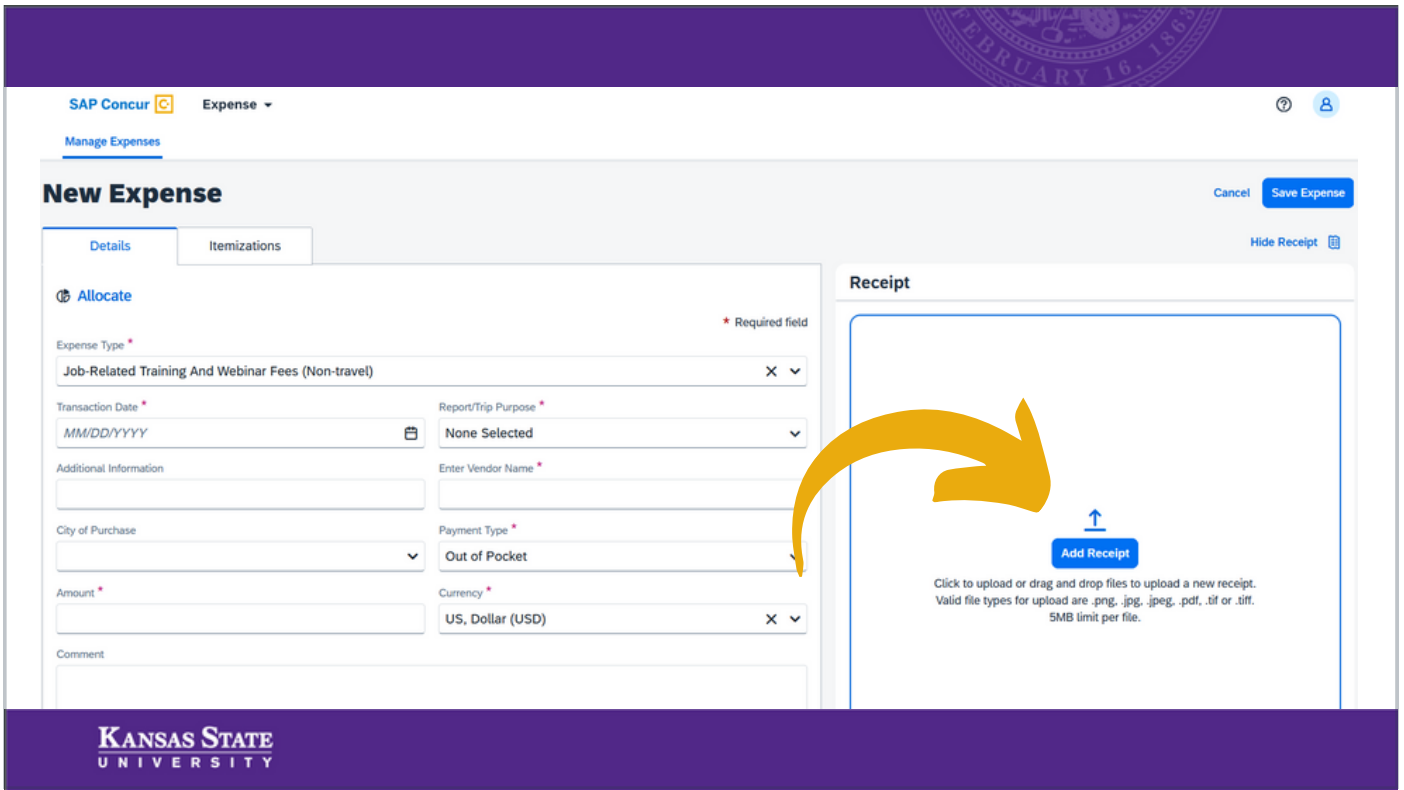
Hotel

Date Range \* Nights: 0 Transaction Date \* 02/21/2024

Additional Comments: None Selected Additional Information:

Vendor \* Lodging Location \*

Once you click on an expense type, a screen will appear with fields pertaining to that expense type. Fill in all required fields (marked with the red asterisk) and any additional fields that apply.



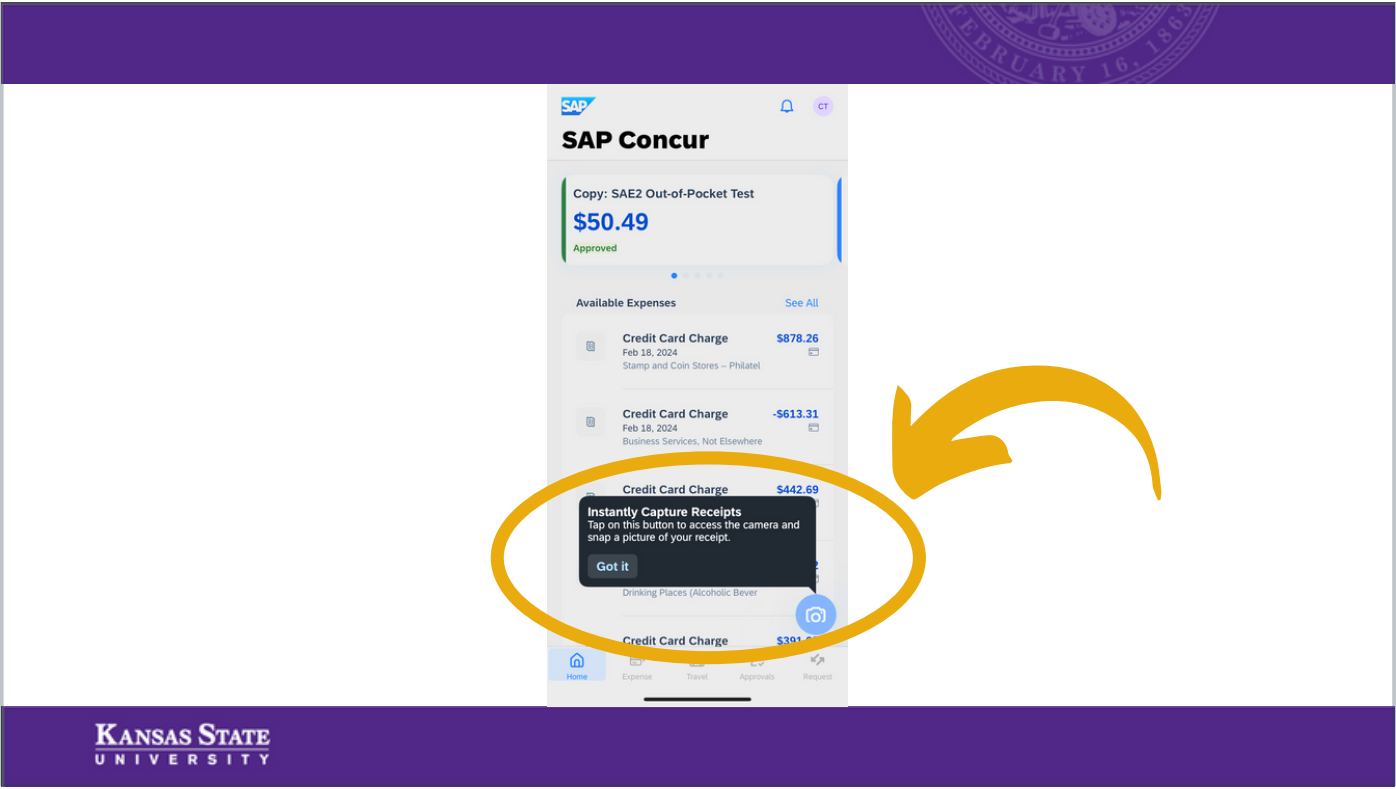
You will need to add a receipt for the expense.



Receipts can be imported into Concur several ways.

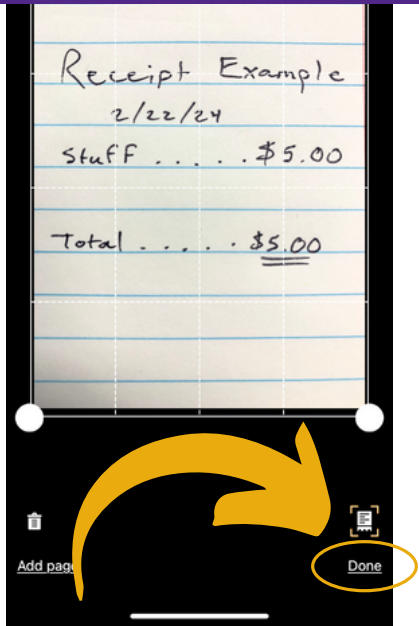


You can capture them through the Concur mobile app.


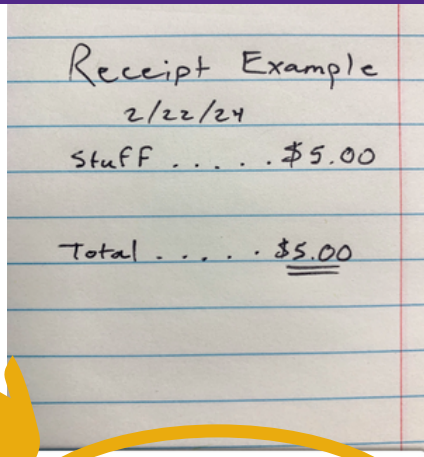


You will see on the app the option to instantly capture receipts through your smart phone camera. It walks you through the steps to do this.





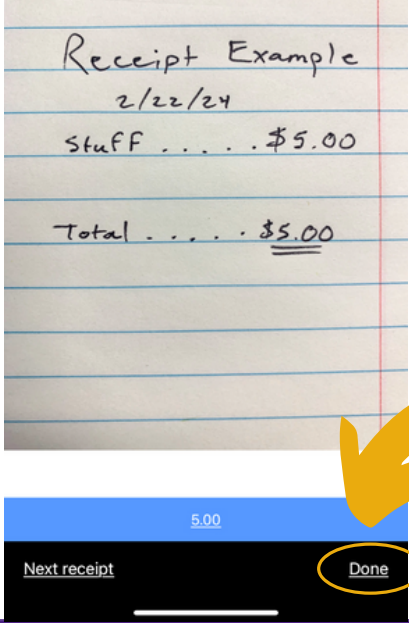
When finished imaging the receipt, click Done at the bottom right corner.



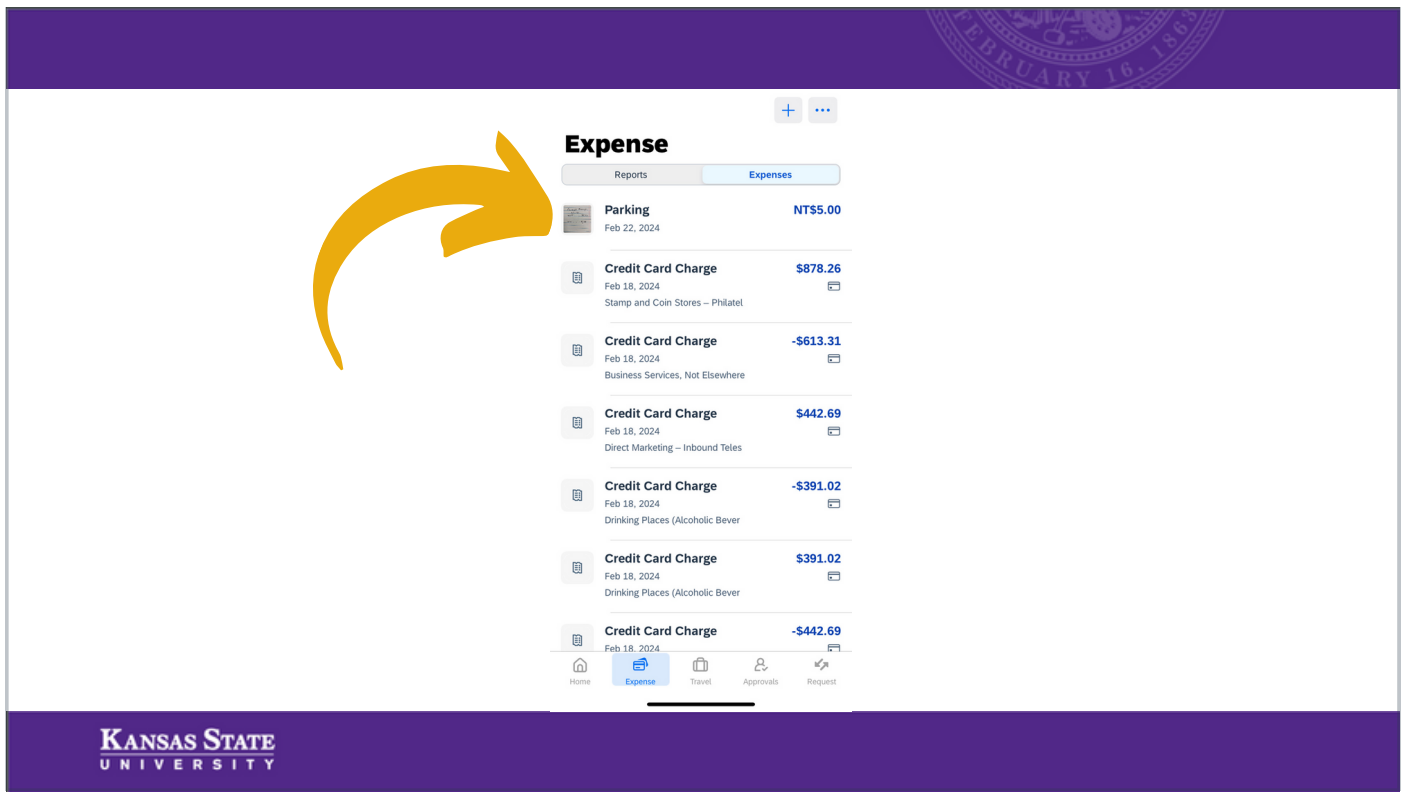
What is the amount on this receipt ?

[Incorrect](#)

The app will read the receipt to suggest the amount. You can confirm or correct this amount.



It will provide the final data. Click Done to complete the process.



The Expense screen will appear showing the receipt/expense that was added.

**99+**  
Available Expenses

**+**  
Create New Expense

<input type="checkbox"/>	Payme... ↓↑	Expen... ↓↑	Expen... ↓↑	Vendo... ↓↑	Date ↓↑	Amount ↓↑
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	US AIR	08/18/2023	\$232.62
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	LAP (PARAGUAY )	08/18/2023	\$662.33
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Airfare	LANCHILE	08/17/2023	\$273.44
<input type="checkbox"/>	KSU Credit Card	Corporate Card	Hotel	DRURY INNS	08/17/2023	\$410.85

Close Add To Report

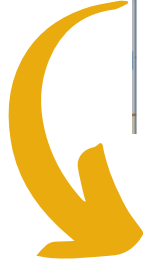
**KANSAS STATE UNIVERSITY**

If the receipt is for a credit card charge and the imaged receipt data pairs closely enough with the information from the card charge, Concur will automatically pair the receipt with the card expense.

### Add Expense

99+  
Available Expenses

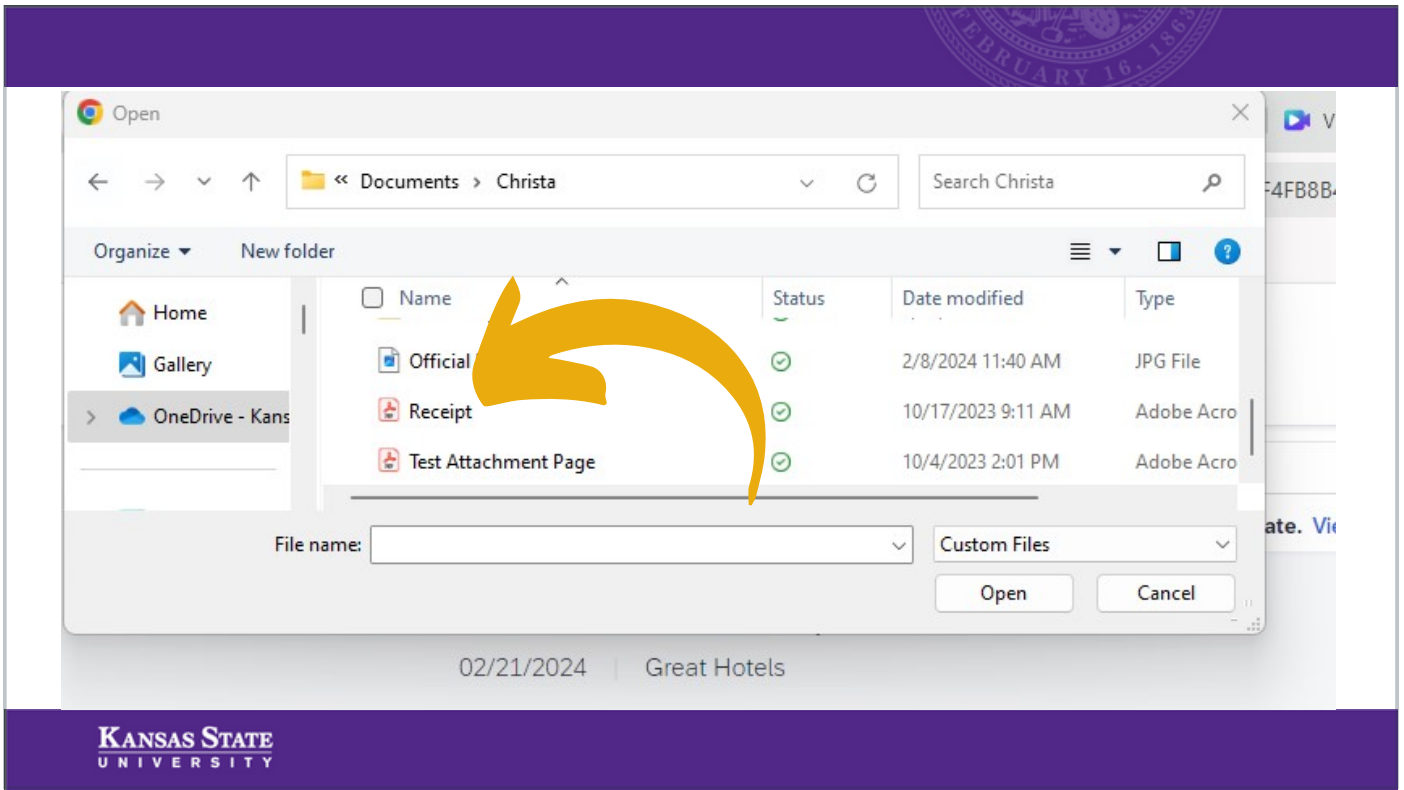
+  
Create New Expense







**Parking**  
Feb 22, 2024

**\$5.00**

Otherwise, it will add it as a new expense that will show under the Available Expenses tab.



Another way to import receipts is to upload them from your computer files into Concur.

 Credit Card Receipt		2/23/2024 10:49 AM	Microsoft Word D...	12 KB
 Official Receipt		2/8/2024 11:40 AM	JPG File	87 KB
 Receipt		10/17/2023 9:11 AM	Adobe Acrobat D...	70 KB

An important note here is that you want your receipts to be separate files. You do not want to take multiple receipts and scan them into the computer as one pdf file, for example, because you need each receipt to be unique in Concur.



**Hotel \$162.16**

02/21/2024 | Great Hotels

Cancel Delete Expense Save Expense

Hide Receipt

**Details** | Itemizations

\* Required field

Expense Type \*  
Hotel

Date Range \* 02/22/2024 - 02/23/2024 Nights: 1 Transaction Date \* 02/21/2024

Additional Comments: None Selected Additional Information:

Vendor \* Great Hotels Lodging Location \* Grand Rapids, Michigan

Payment Type \* Out of Pocket

Amount \* 162.16 Currency \* US, Dollar (USD)

Comment 0/500

**Receipt**

**Add Receipt**

Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

To add a receipt to an expense, click the Add Receipt button.

The screenshot displays the 'Hotel \$162.16' expense entry page. The main form includes fields for Expense Type (Hotel), Date Range (02/22/2024 - 02/23/2024), Nights (1), Transaction Date (02/21/2024), Vendor (Great Hotels), Lodging Location (Grand Rapids, Michigan), Payment Type (Out of Pocket), and Amount (162.16). A yellow arrow points from the top of the form to the 'Attach Receipt' modal window on the right. The modal window shows 'Available Receipts (0)' and an 'Upload New Receipt' button. The Kansas State University logo is visible at the bottom left of the page.

The Available Receipts screen will generate. If you have available receipts already uploaded, select the correct receipt.

**Hotel \$162.16**

02/21/2024 | Great Hotels

Cancel Delete Expense Save Expense

Details Itemizations Hide Receipt

\* Required field

Expense Type \*  
Hotel

Date Range \* 02/22/2024 - 02/23/2024 Nights: 1 Transaction Date \* 02/21/2024

Additional Comments: None Selected Additional Information:

Vendor \* Great Hotels Lodging Location \* Grand Rapids, Michigan

Payment Type \* Out of Pocket

Amount \* 162.16 Currency \* US, Dollar (USD)

Receipt

Available Receipts (0)

Upload New Receipt

You have no available receipts

KANSAS STATE UNIVERSITY

Otherwise, upload the receipt.

The screenshot displays a web interface for managing expenses. At the top, a purple header features the Kansas State University logo and the text "FEBRUARY 16, 1863". Below the header, the main content area is divided into two sections. On the left, a form titled "Hotel \$162.16" (dated 02/21/2024) is shown under the "Details" tab. The form includes fields for "Expense Type" (Hotel), "Date Range" (02/22/2024 - 02/23/2024), "Nights" (1), "Transaction Date" (02/21/2024), "Additional Comments" (None Selected), "Vendor" (Great Hotels), "Lodging Location" (Grand Rapids, Michigan), "Payment Type" (Out of Pocket), and "Amount" (162.16). On the right, a "Receipt" section contains a "Receipt" button and a preview of a receipt document. A large yellow arrow points from the "Receipt" button to the receipt preview. The bottom of the page features the "KANSAS STATE UNIVERSITY" logo.

The receipt now shows in the receipt box at the right of the screen.



If a receipt was not originally obtained or is lost and the cardholder has contacted the vendor to request a copy of the receipt but the receipt cannot be provided,

## Attach Receipt



### Available Receipts (0)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration. [Missing Receipt Declaration](#)

 Upload New Receipt

Sort By 



the Missing Receipt Letter in Concur must be used in place of the receipt; its use is subject to department approval, and it can only be completed by the employee; delegates are not able to access this letter because, like the User Submit Agreement, it has the electronic signature component.



Your hotel room(s) \_\_\_\_\_

The Same Every Night  Not the Same

Room Rate (per night)*	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(Amount in USD) [Add Tax Fields](#)

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If one portion of the expense falls under one expense type and another part of the expense falls under a different expense type, you will need to itemize that expense. The hotel expense type, for example, will always need to be itemized to distinguish the room charge from the taxes.

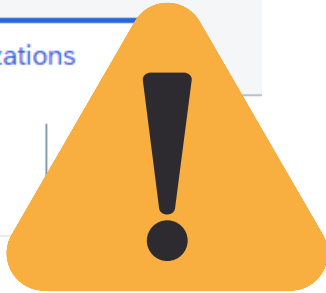


# Hotel \$162.16

02/21/2024 | Great Hotels

Details | **Itemizations**

Amount  
\$162.16



**available to  
traveler/delegate only  
prior to submitting**

## *New Itemization*

Expense Type \*

Hotel

As an important note, itemizations can only be added before a report is submitted. Either the traveler or the delegate may itemize the expenses, but once the traveler submits the report, the expense details cannot be changed unless the report is sent back to the employee for correction.





# Training Tip!

SAP Concur Profile ▾

Profile Personal Information Change Password System Settings Concur

## Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

## Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

## E-Receipt Activation

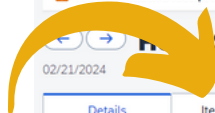
You have enabled e-receipts from participating partners to sync with your SAP Concur account. You may disable this functionality at any time. If you disable this setting, SAP Concur will no longer request e-receipts from these partners.

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator. [Disable](#)

Also, as a training tip, if you have e-receipts activated in your profile settings, itemizations associated with e-receipt expenses are automatically generated, reducing manual data entry.



- Alerts: 5
- All 4 1
  - Itemizations are required for this entry. [View](#)
  - Missing required field: Vendor.
  - ACTION: This report cannot be submitted until after the trip end date.
  - The transaction date of this entry is outside the date range of the associated itinerary.
  - You must attach a receipt image to this expense.



02/21/2024 **\$300.00** Cancel Delete Expense Save Expense

Details Itemizations Hide Receipt

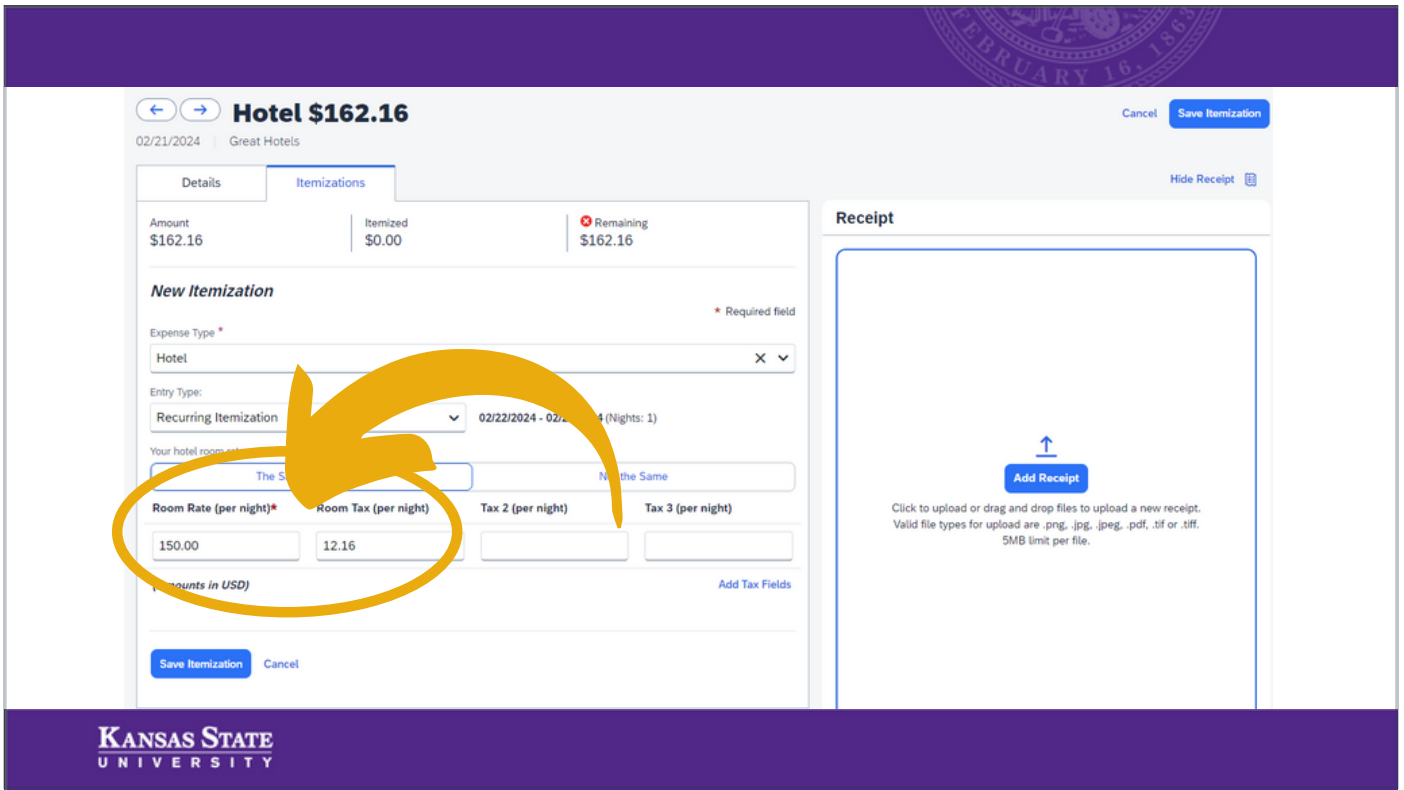
Expense Type \* \* Required field  
Hotel

Date Range \* Nights: 0 Transaction Date \*  
MM/DD/YYYY - MM/DD/YYYY 02/21/2024

Additional Comments: None Selected Additional Information:

Vendor \* Lodging Location \*

To add an itemization, click on the Itemizations tab.



Then, on the next screen, for the hotel expense, add the nightly room rate and the tax.



Details    **Itemizations**

Amount: \$300.00    Itemized: \$0.00    Remaining: \$300.00

**New Itemization** \* Required field

Expense Type \*  
Hotel

Entry Type:  
Recurring Itemization    02/21/2024 - 02/23/2024 (Nights: 3)

Your hotel room rate was:  
 The Same Every Night     Not the Same

Date	Room Rate*	Room Tax	Tax 2	Tax 3
02/21/2024				
02/22/2024				

(Amounts in USD) Add Tax Fields



If you stayed multiple nights and the room rate and tax varied per night, click the Not the Same option

Details    **Itemizations**

Amount: \$300.00    Itemized: \$0.00    Remaining: \$300.00

**New Itemization** \* Required field

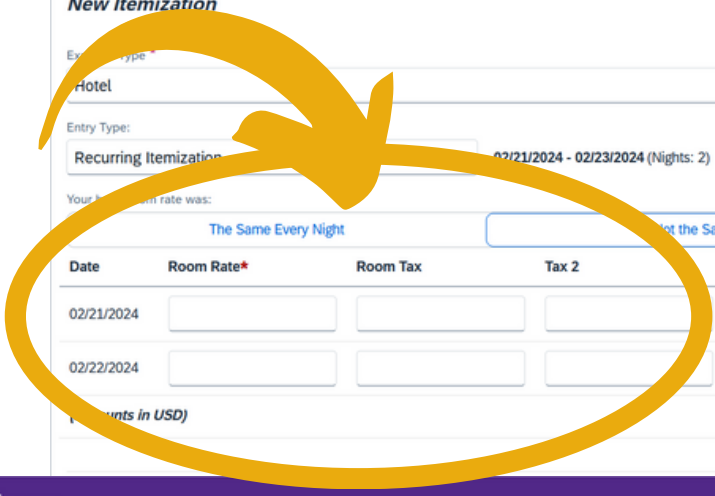
Entry Type: **Hotel** X v

Entry Type: **Recurring Itemization**    02/21/2024 - 02/23/2024 (Nights: 2)

Your room rate was: **The Same Every Night**     **Not the Same**

Date	Room Rate*	Room Tax	Tax 2	Tax 3
02/21/2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
02/22/2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(Amounts in USD) [Add Tax Fields](#)



and enter each night's rate and tax as applicable.



Hotel \$162.16 Cancel Save Itemization

02/21/2024 | Great Hotels Hide Receipt

Details **Itemizations**

Amount	Itemized	Remaining
\$162.16	\$0.00	\$162.16

**New Itemization** \* Required field

Expense Type \*  
Hotel

Entry Type:  
Recurring Itemization 02/22/2024 - 02/23/2024 (Nights: 1)

Your hotel room rate was:  
This is the same as the bill. Not the Same

Room Rate (per night)	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
0.00	12.16		

(Add Tax Fields) Add Tax Fields

Save Itemization Cancel

**Receipt**

Add Receipt

Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

When finished, click Save Itemization.

# Hotel \$162.16

02/21/2024 | Great Hotels

Details | **Itemizations**

Amount <b>\$162.16</b>	Itemized <b>\$162.16</b>	Remaining <b>\$0.00</b>
---------------------------	-----------------------------	----------------------------

[Create Itemization](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#)

<input type="checkbox"/>	Alerts↑↓	Date↑↓	Expense Type↑↓	Requested↑↓	
<input type="checkbox"/>	✖	02/22/2024	Hotel	\$150.00	...
<input type="checkbox"/>	✖	02/22/2024	Hotel Tax	\$12.16	...

The itemizations screen will now show that the expense has been divided between the two expense types.

**Hotel \$162.16**  
02/21/2024 | Great Hotels

Cancel Delete Expense Save Expense

Hide Receipt

Details Itemizations

Amount \$162.16 Itemized \$162.16 Remaining \$0.00

Create Itemization Edit Delete Copy Allocate

<input type="checkbox"/>	Alerts	Date	Expense Type	Requested	
<input type="checkbox"/>		02/22/2024	Hotel	\$150.00 Allocated	...
<input type="checkbox"/>		02/22/2024	Hotel Tax	\$12.16 Allocated	...

Receipt

1 / 1

KANSAS STATE UNIVERSITY

If your expense details are finalized, click on Save Expense in the top right corner.





Alerts: 13

## Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81



Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>	✖		Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Itemized	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
							\$682.97	

On the expense screen that appears, you'll see an option to allocate the expenses—to assign a funding string to them.



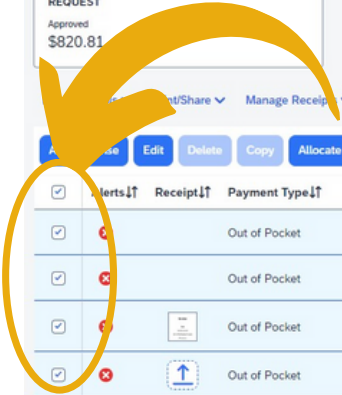
Alerts: 13

## Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81



Print/Share Manage Receipts Travel Allowance

View Available Receipts

Cancel Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input checked="" type="checkbox"/>	Receipts	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>		Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input checked="" type="checkbox"/>		Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>		Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Itemized	...
<input checked="" type="checkbox"/>		Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
						\$682.97	

If there are multiple expenses and they all need to be assigned the same funding string, you can click on the top checkbox to select all of them at once.



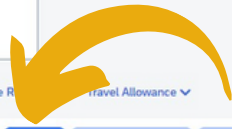
Alerts: 13

## Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81



Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>	✖		Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Itemized	...
<input checked="" type="checkbox"/>	✖		Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00	...
							\$682.97	

Then click Allocate.



SAP Concur Expense

### Allocate

Expenses: 5 | \$682.97



Percent	Amount
	Allocated \$682.97
	100%

Amount  
\$682.97

Default Allocation

Code  
**Default**

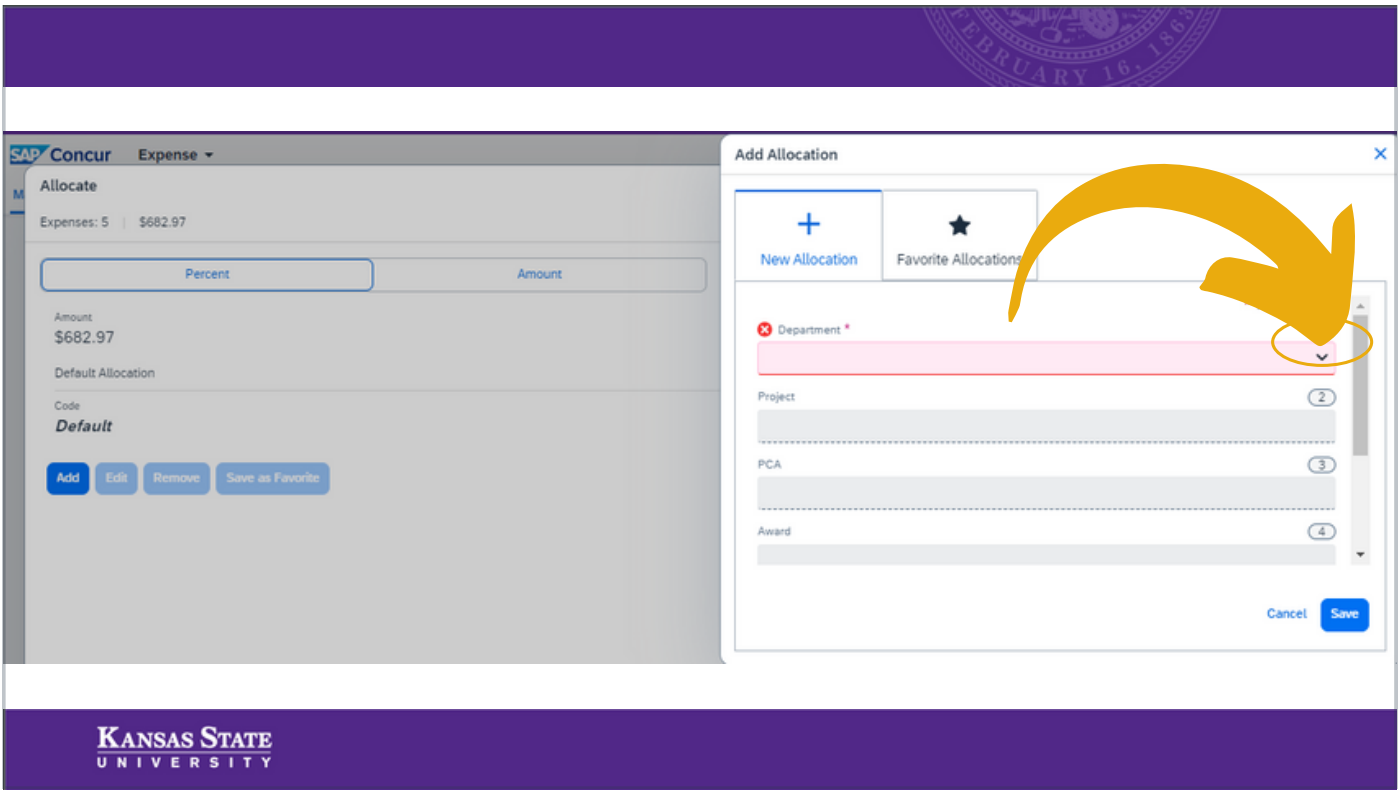
[Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)



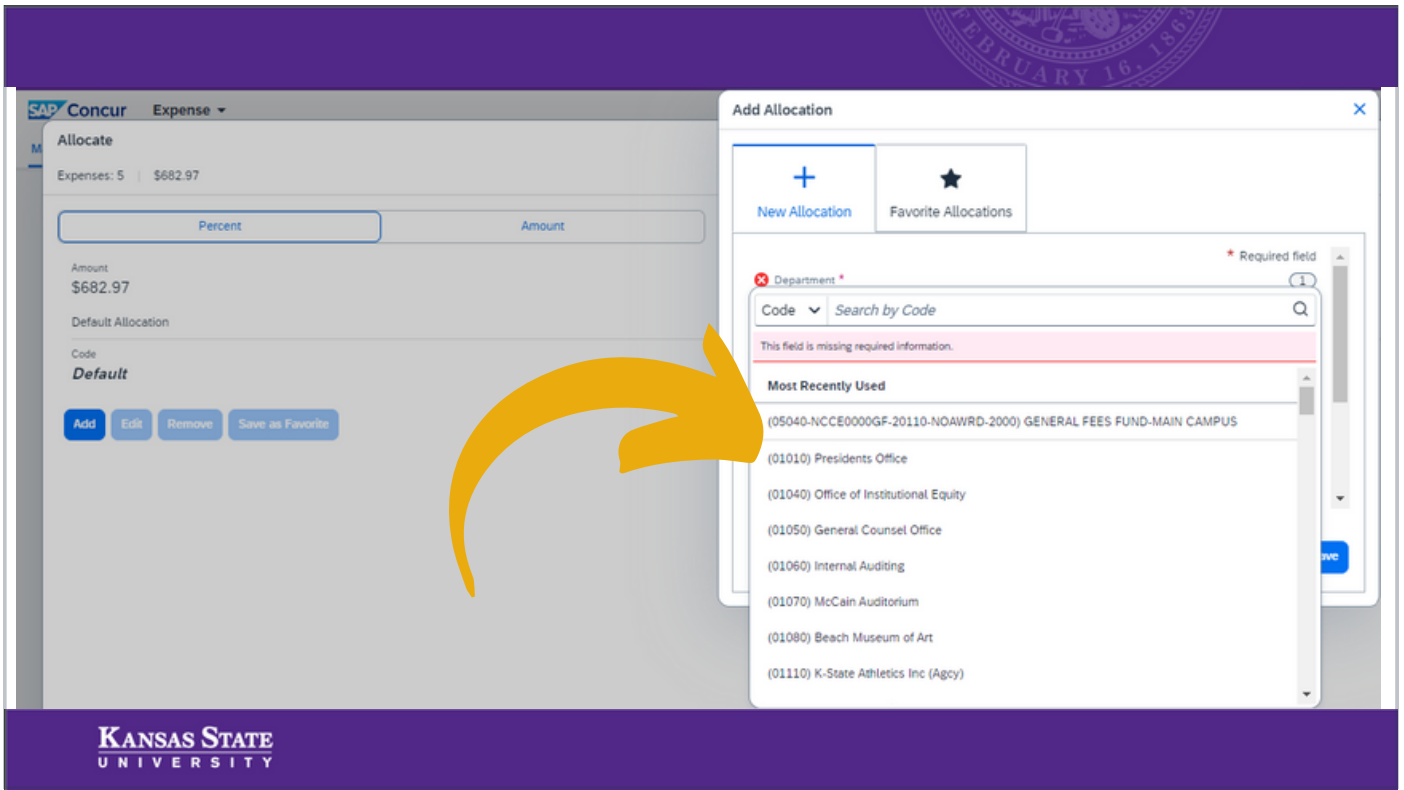
**No Allocations**  
These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently.

**KANSAS STATE UNIVERSITY**

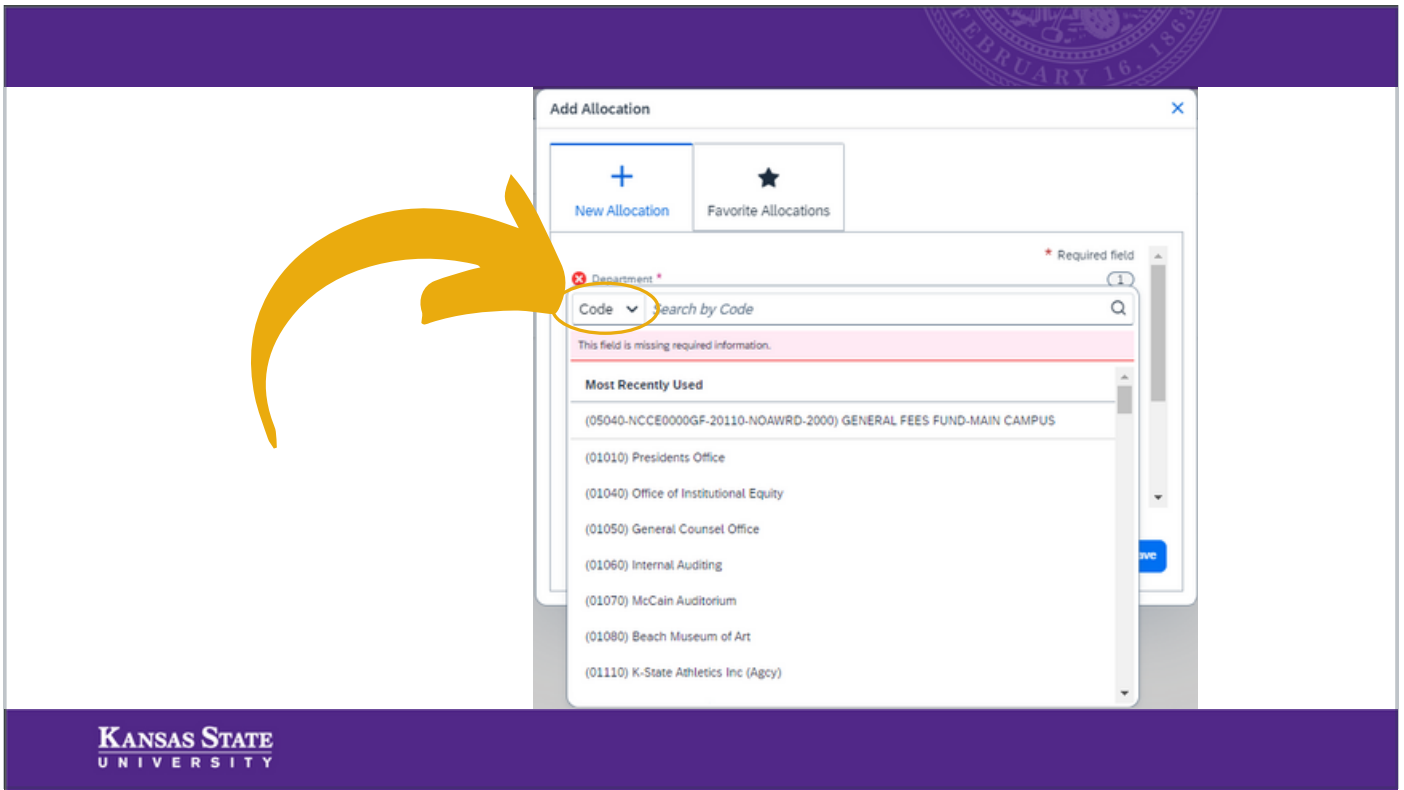
On the Allocation screen, click Add.



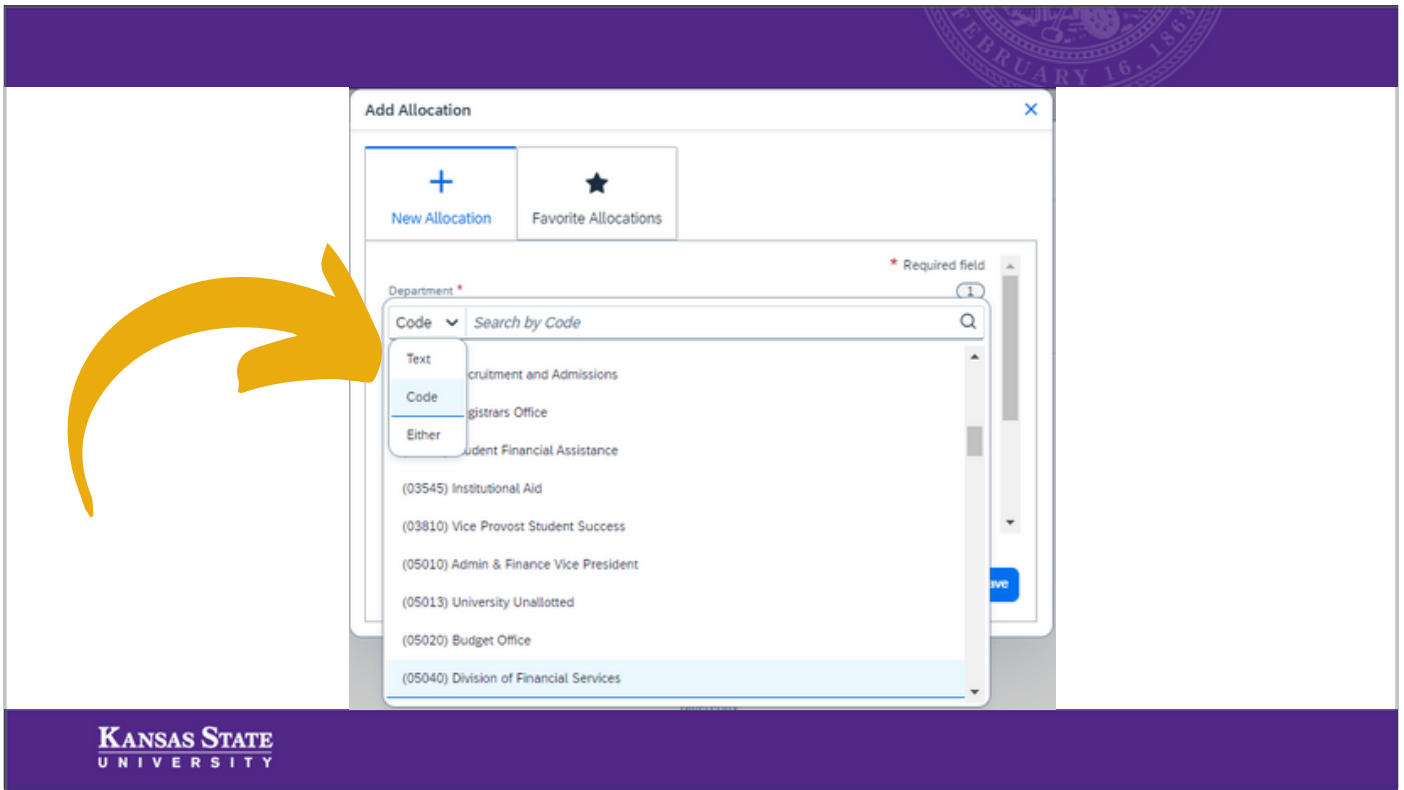
Starting with the top Department field, click on the dropdown menu



And search for and select the appropriate option.



The default search is set to search by code,



but you can change this to search by text or by either text or code.



**Add Allocation** [X]

**+** New Allocation | **★** Favorite Allocations

(20110) General Academic Instruction - Instruction [X] v

Award \* (4)  
NOAWRD [X] v

Fund Source \* (5)  
(2000) RESTRICTED FEES FUND - MAIN [X] v

Department Identifier

Cancel Save

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The last allocation field in the Department Identifier field. This is an optional field that may be used by departments to add other identifying information associated with the funding string for departmental use.



SAP Concur Expense

Allocate

Expenses: 5 | \$682.97

Percent Amount

Amount  
\$682.97

Default Allocation

Code  
**Default**

Add Edit Remove Save as Favorite

**Add Allocation**

New Allocation Favorite Allocations

Department \* (05040) Division of Financial Services

Project \* (NCCE0000GF) CCE GF

PCA \* (20110) General Academic Instruction - Instruction

Award \* NOAWRD

Cancel Save

Once all fields are filled in, click save.



SAP Concur Expense

Allocate

Expenses: 5 | \$682.97 | View Allocation Group

Percent | Amount

Amount: \$682.97 | Allocated \$682.97 100% | Remaining \$0.00 0%

Default Allocation

Code: Default

Buttons: Add, Edit, Remove, Save as Favorite

Department	Project	PCA	Award	Fund Source	Department Identifier	Code	Percent %
Division of Financial Services	CCE GF	General Academic Instruction - Instruction	NOAWRD	GENERAL FEES FUND-MAIN CAMPUS	05040-NCCCE0000GF-20110-NOAWRD-2000	100	100

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If this is a funding string you will use often, click Save as Favorite to store it in your favorite allocations cache. Favorite allocations are specific to a person's profile. They cannot be shared or accessed by delegates.

The screenshot displays the 'Allocate' interface in the Concur system. At the top, it shows 'Expenses: 5 | \$682.97' and a 'View Allocation Group' link. Below this, there are input fields for 'Percent' and 'Amount'. A summary section indicates 'Allocated \$682.97' (100%) and 'Remaining \$0.00' (0%). The 'Code' is set to 'Default'. A table lists the allocation details:

<input type="checkbox"/>	Department	Project	PCA	Award	Fund Source	Department Identifier	Code	Percent %	
<input type="checkbox"/>	Division of Financial Services	CCE GF	General Academic Instruction - Instruction	NOAWRD	GENERAL FEES FUND-MAIN CAMPUS		05040-NCCES000GF-20110-NOAWRD-2000	100	...

A yellow arrow points to the 'Save' button located at the bottom right of the screen, next to a 'Cancel' button.

Then, to save the allocation you assigned to the expenses, click on the Save button at the bottom right of the screen.



# Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

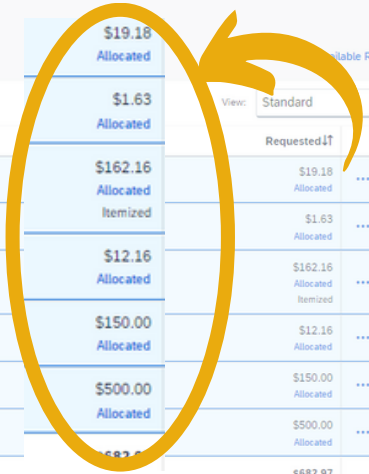
Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Alerts	Receipts	Payment Type	Expense Type	Vendor Details		Requested	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	\$19.18 Allocated	\$19.18 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	\$162.16 Allocated	\$162.16 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	\$12.16 Allocated	\$12.16 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel Tax	Great Hotels Grand Rapids, Michigan	\$150.00 Allocated	\$150.00 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	\$500.00 Allocated	\$500.00 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Airfare	Grand Rapids, Michigan	\$682.97 Allocated	\$682.97 Allocated	...



The expenses now show on the expense list as allocated.



# Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input checked="" type="checkbox"/>	Alerts	Receipts	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Allocated Itemized	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel Tax	Great Hotels Grand Rapids, Michigan	02/22/2024	\$12.16 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/22/2024	\$150.00 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00 Allocated	...
							\$682.97	



To edit the allocation, check the box or boxes of the entries you wish to change and click Allocate.



# Grand Rapids IDT Conference \$682.97

Delete Report Copy Report Submit Report

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81

Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input type="checkbox"/>	Alerts	Re	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Allocated Itemized	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel Tax	Great Hotels Grand Rapids, Michigan	02/22/2024	\$12.16 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/22/2024	\$150.00 Allocated	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00 Allocated	...
							\$682.97	



To edit other expense details, check the box or boxes of the applicable expenses, and click Edit.



## Grand Rapids IDT Conference \$682.97

[Delete Report](#) [Copy Report](#) [Submit Report](#)

Not Submitted | Report Number: KO2QDD

REQUEST  
Approved  
\$820.81



[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

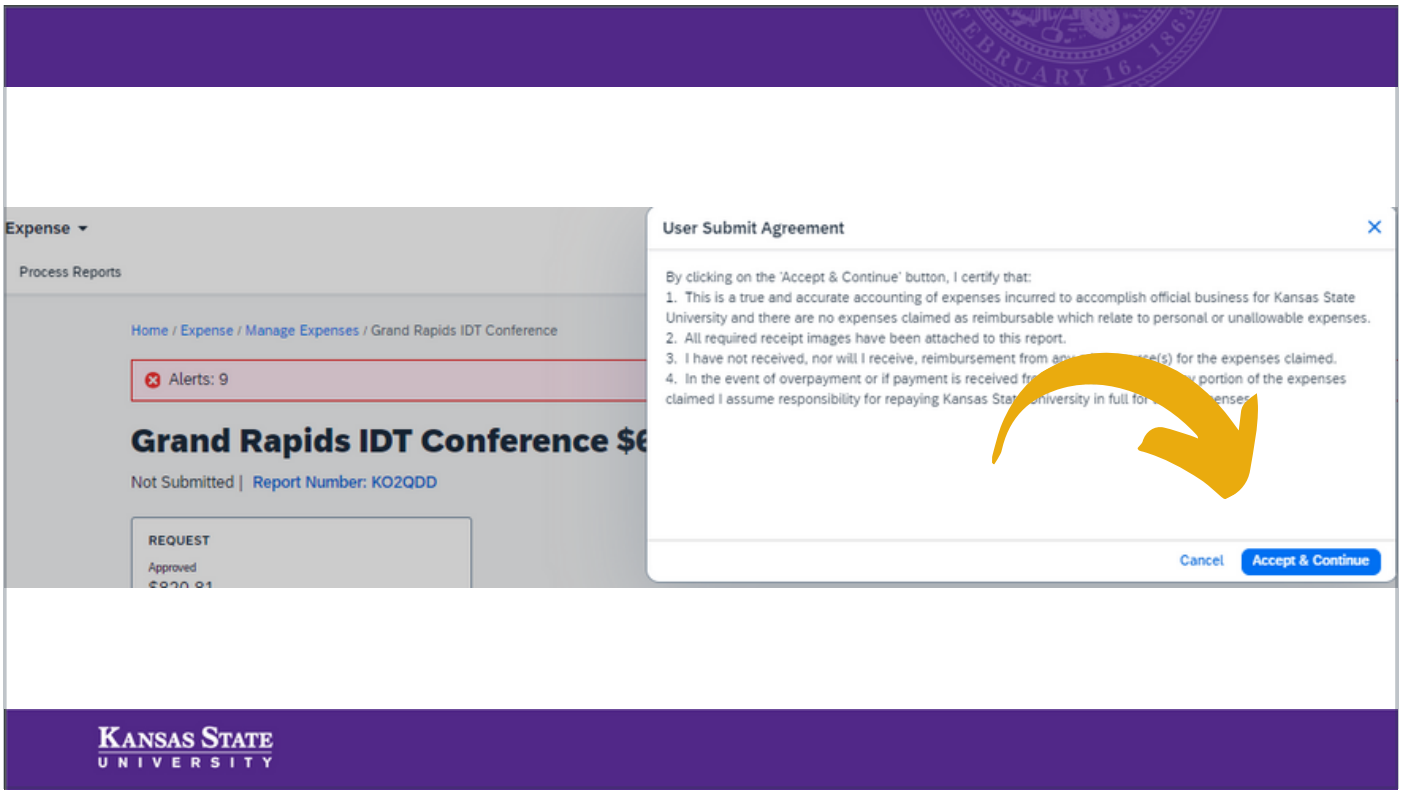
View: [Standard](#)

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Meal Per Diem	Grand Rapids, Michigan	02/22/2024	\$19.18 Allocated	...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Incidentals Per Diem	Grand Rapids, Michigan	02/22/2024	\$1.63 Allocated	...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/21/2024	\$162.16 Allocated Itemized	...	^
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel Tax	Great Hotels Grand Rapids, Michigan	02/22/2024	\$12.16 Allocated	...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Hotel	Great Hotels Grand Rapids, Michigan	02/22/2024	\$150.00 Allocated	...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out of Pocket	Airfare	Grand Rapids, Michigan	02/21/2024	\$500.00 Allocated	...	
							<b>\$682.97</b>		



When all expense details are complete, click Submit Report in the top right corner.





The User Submit Agreement will appear. Review and acknowledge the terms of the electronic submission. Clicking Accept and Continue serves as your electronic signature.



**Report Totals** [X]

<b>Company Payments</b> <b>\$350.00</b> Employee	<b>\$232.62</b> KSU Credit Card
--	------------------------------------

---

<b>Employee Payments</b> <b>\$0.00</b> Company
--

Amount Total: \$582.62	Employee: \$0.00	Owed Company: \$0.00
---------------------------	---------------------	-------------------------

Requested Amount: \$582.62	Total Paid By Company: \$582.62	Total Owed By Employee: \$0.00
-------------------------------	------------------------------------	-----------------------------------

Amount Due (KSU Credit Card):  
\$232.62

Cancel Submit Report

You will see the report totals screen that provides details of the total expenses paid by university credit card

Report Totals

<b>Company Payments</b>		
<b>\$350.00</b> Employee	<b>\$232.62</b> KSU Credit Card	
<b>Employee Payments</b>		
<b>\$0.00</b> Company		
Amount Total: \$582.62	Due Employee: \$350.00	Owed Company: \$0.00
	Amount Due (KSU Credit Card): \$232.62	
Requested Amount: \$582.62	Total Paid By Company: \$582.62	Total Owed By Employee: \$0.00

Cancel Submit Report

and/or due to the traveler for the out-of-pocket expenses being reimbursed.

SAP Concur Expense

Manage Expenses Card Transactions Cash Advances

## Manage Expenses

Report Library Create New Report

View: Active Reports

<b>Seminar</b> 10/15/2023 <b>\$614.59</b> Not Submitted	<b>Card Transactions Test</b> 10/15/2023 <b>\$481.29</b> Not Submitted	<b>September 2023 Mileage</b> 10/10/2023 <b>\$237.49</b> Due Employee: \$237.49 Submitted Pending Accounts Payable Manager Approval
--	---	--

Available Expenses

Enable Expense Assistant and these expenses will be placed in a report for you. [Learn More](#)

Delete Combine Expenses Move to

View: All Expenses

Receipt	Payment Type	Expense Source	Expense Type	Vendor Details	Date	Amount
---------	--------------	----------------	--------------	----------------	------	--------

KANSAS STATE UNIVERSITY

Like requests, the submitted report will show in your Report Library, where you will find all reports that have not yet been paid by Processing. This includes reports you have not yet submitted, those you have submitted that are pending approval, and those that have been returned to you by an approver for correction. Reports that are fully approved will not show here



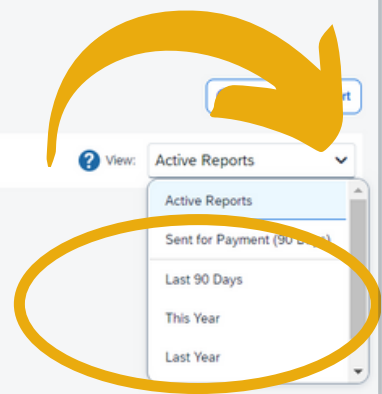
Home / Expense / Manage Expenses

## Manage Expenses

### Report Library

**Airfare Expense Review 0221**  
02/21/2024  
**\$25.68**  
Not Submitted

**Grand Rapids IDT Conference** ✖  
02/21/2024  
**\$712.97**  
Not Submitted



but can be found under the dropdown menu that allows you to access archived reports.

The screenshot displays the SAP Concur Expense management interface. At the top, there is a navigation bar with 'SAP Concur Expense' and a 'Manage Expenses' section containing 'Manage Expenses', 'Card Transactions', and 'Cash Advances'. The main heading is 'Manage Expenses' with a 'Report Library' sub-section. A 'Create New Report' button is visible in the top right. A 'View: Active Reports' dropdown menu is present. Three report cards are shown: 'Seminar' (\$614.59, Not Submitted), 'Card Transactions Test' (\$481.29, Not Submitted), and 'September 2023 Mileage' (\$237.49, Submitted). The 'September 2023 Mileage' card includes a status indicator 'Submitted' and a note 'Pending Accounts Payable Manager Approval'. A yellow arrow points to the 'Submitted' status. Below the reports is an 'Available Expenses' section with a message: 'Enable Expense Assistant and these expenses will be placed in a report for you. Learn More'. At the bottom, there are buttons for 'Delete', 'Combine Expenses', and 'Move to', and a 'View: All Expenses' dropdown. A table header is visible with columns: Receipt, Payment Type, Expense Source, Expense Type, Vendor Details, Date, and Amount. The footer of the page features the 'KANSAS STATE UNIVERSITY' logo.

The report box will indicate the status of the report

The screenshot displays the SAP Concur Expense Management interface. At the top, there is a navigation bar with 'SAP Concur Expense' and a 'Manage Expenses' section containing 'Manage Expenses', 'Card Transactions', and 'Cash Advances'. The main heading is 'Manage Expenses' with a 'Report Library' sub-section. A 'Create New Report' button is visible in the top right. Below this, a 'View: Active Reports' dropdown is present. Three expense reports are shown in a grid:

- Seminar** (10/15/2023): Amount \$614.59, Status: Not Submitted.
- Card Transactions Test** (10/15/2023): Amount \$481.29, Status: Not Submitted.
- September 2023 Mileage** (10/10/2023): Amount \$237.49, Status: Submitted. A yellow arrow points to the 'Submitted' label. Below the amount, it says 'Due Employee: \$237.49' and 'Pending Accounts Payable Manager Approval'.

Below the reports is an 'Available Expenses' section with a message: 'Enable Expense Assistant and these expenses will be placed in a report for you. Learn More'. At the bottom, there are action buttons: 'Delete', 'Combine Expenses', and 'Move to'. A 'View: All Expenses' dropdown is also present. A table header is visible at the very bottom with columns: Receipt, Payment Type, Expense Source, Expense Type, Vendor Details, Date, and Amount.

And, if it's in the approval process, where it is in that process.

**SAP Concur** Expense

Manage Expenses | Card Transactions | Cash Advances

## Manage Expenses

Report Library Create New Report

View: Active Reports

<b>Seminar</b> 10/15/2023 <b>\$614.59</b> Not Submitted	<b>Card Transactions Test</b> 10/15/2023 <b>\$481.29</b> Not Submitted	<b>September 2023 Mileage</b> 10/10/2023 <b>\$237.49</b> Due Employee: \$237.49 Submitted Pending Accounts Payable Manager Approval
--	---	---

### Available Expenses

Enable Expense Assistant and these expenses will be placed in a report for you. [Learn More](#)

Delete | Combine Expenses | Move to

View: All Expenses

<input type="checkbox"/>	Receipt	Payment Type	Expense Source	Expense Type	Vendor Details	Date	Amount
--------------------------	---------	--------------	----------------	--------------	----------------	------	--------

**KANSAS STATE UNIVERSITY**

And that’s the process of creating and submitting an expense report—again, very similar to the process for requests.



- **concur.k-state.edu**

- Training
  - videos
  - printable pdfs
- FAQs
- Survey link



- **Concur Collaboration Zoom sessions:**

- February 27-March 31: 8am-noon; 1-5pm (hours may be reduced based on need)
- <https://ksu.zoom.us/j/94653408664> Meeting ID: 946 5340 8664

- **Anthony Travel**

- Training March 26-28
- On-site agent April 1

A reminder—as you are working with Concur, numerous resources are available to you, including our survey link for questions which can be accessed through the QR code.

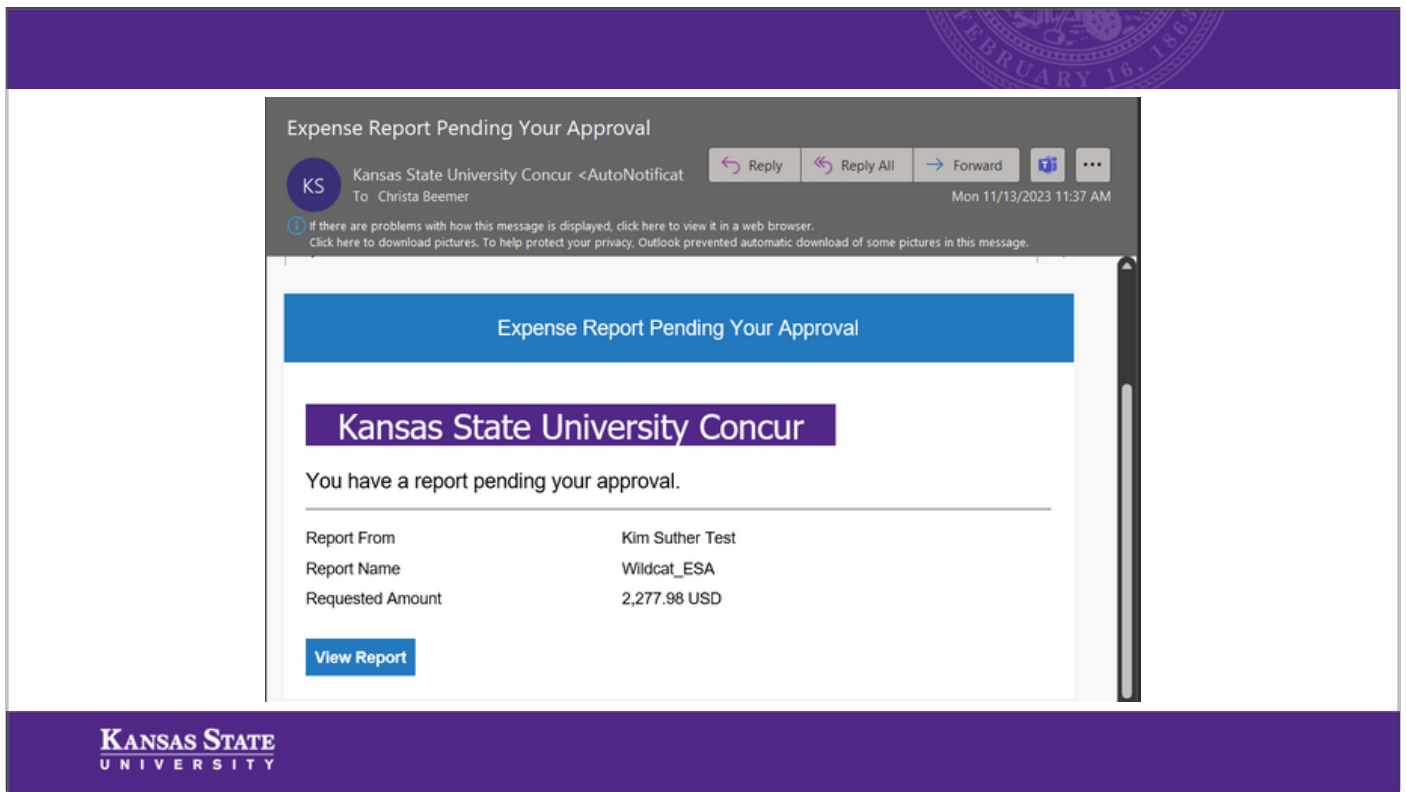


On that note, we'll take questions at this time.



# Approver/Delegate Responsibilities

We'll transition next to the approval responsibilities of supervisors and department heads or their approval delegates. To start with, let's look at how to access requests and reports for approval.



If you have email notifications turned on in your profile settings email preferences, you can access each request or report through the email you will receive once that request or expense report enters your approval queue.

SAP Concur Home

KANSAS STATE UNIVERSITY

+ Start a Request + Start a Report 02 Required Approvals 00 Authorization Requests 00 Available Expenses 00 Open Reports

Deployment Notes

You can access the deployment toolkit using this link.

Concur Training Toolkit

This link provides access to the Concur Expense System.

My Tasks

02 Required Approvals →

Nick T. | Europe Travel Request  
\$3,000.00 — Travel

Stacy T. | Red Stapler  
\$15.00 — Expense

00 Available Expenses →

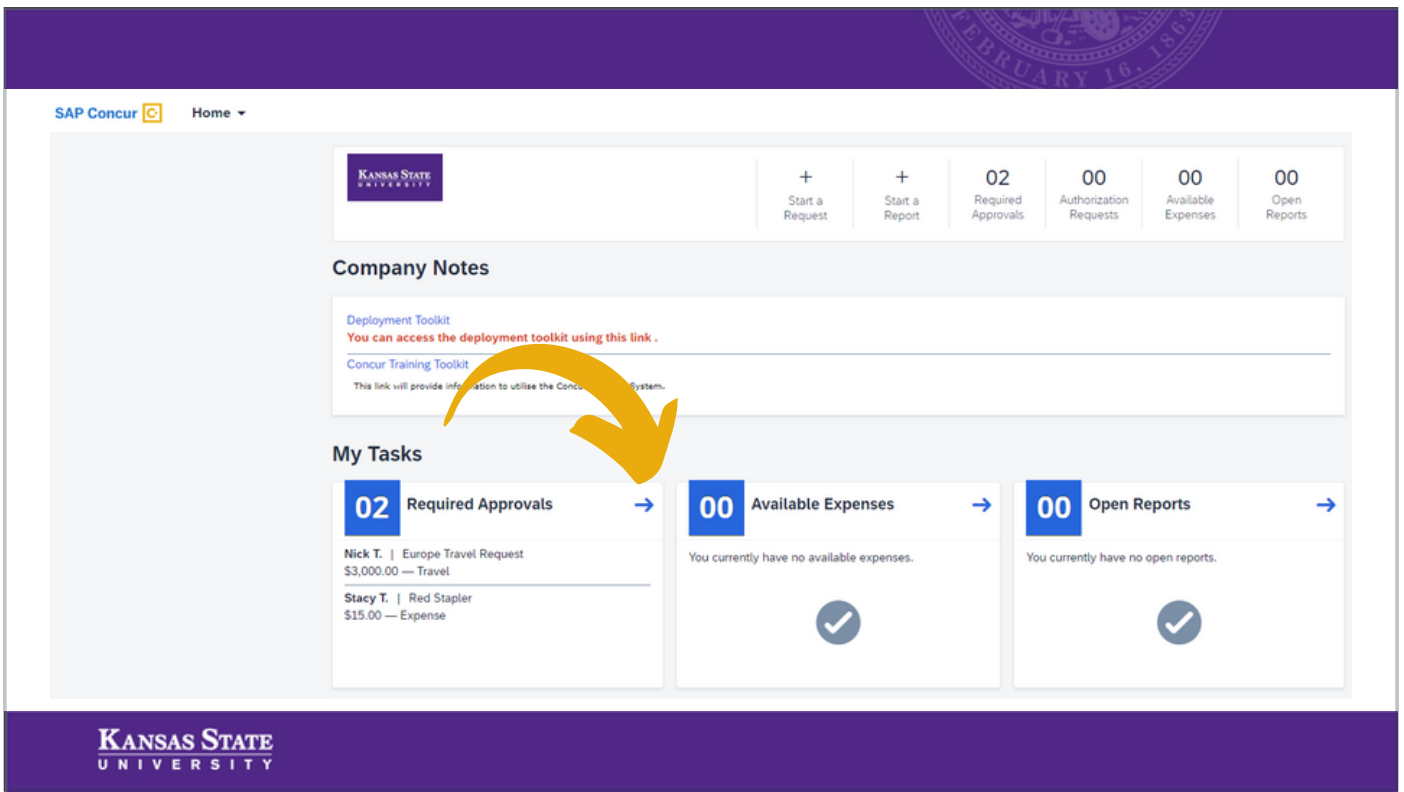
You currently have no available expenses.

00 Open Reports →

You currently have no open reports.

KANSAS STATE UNIVERSITY

You can also access all requests or expense reports in your approval queue.



On your Concur dashboard under the Required Approvals task section, click on the arrow to go to the Approvals screen.



Expense Report List

### Reports Pending your Approval (4)

View

Report Name Begins With  Go

<input type="checkbox"/>	Employee Name	Report Name	Comments	Report Date	Date Submitted	Total	Amount Due Empl...	Requested Amount
<input type="checkbox"/>	Test, Nick	Delegate Report Training registration fees		10/16/2023	10/16/2023	\$175.00	\$175.00	\$175.00
		INFO: This expense report was created by a delegate/proxy.						
<input type="checkbox"/>	Test, Nick	Expense Report with No Request		10/13/2023	10/13/2023	\$600.00	\$600.00	\$600.00
		This report has one or more entry level exceptions.						
<input type="checkbox"/>	Test, Stacy	Travel to Super Cool Conference	Gonna learn cool stuff	10/10/2023	10/17/2023	\$4,092.50	\$4,092.50	\$4,092.50
<input type="checkbox"/>	Test, Stacy	Red Stapler Cuz I needed it		10/09/2023	10/09/2023	\$15.00	\$15.00	\$15.00
		This report has one or more entry level exceptions.						

The Requests/Reports Pending Approval page will appear showing all the requests or expense reports in your approval queue.



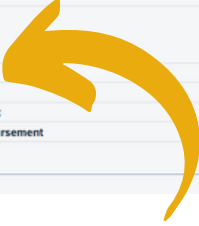
Expense Report List

## Reports Pending your Approval (7)

View ▾

Report Name  Begins With

<input type="checkbox"/>	Employee Name	Report Name	Comments	Report Date	Date Submitted	Total	Amount Due Empl...	Requested Amount
<input type="checkbox"/>	Test, Nick	January Reimbursements		01/18/2024	01/19/2024	\$180.00	\$180.00	\$180.00
<input type="checkbox"/>	Test, Traveler3	Find the Funding 0111		01/11/2024	01/11/2024	\$687.31	\$687.31	\$687.31
		⚠ This report has one or more entry level exceptions.						
<input type="checkbox"/>	Test, Nick	1.10.24 Report		01/10/2024	01/12/2024	\$65.30	\$65.30	\$65.30
<input type="checkbox"/>	Test, Traveler3	Testing 0108		01/08/2024	01/09/2024	\$276.21	\$276.21	\$276.21
<input type="checkbox"/>	Test, Nick	WFL Limit Test - DH Submit		12/04/2023	12/05/2023	\$600.00	\$600.00	\$600.00
<input type="checkbox"/>	Test, Supervisor Approver	August 2023 Travel Reimbursement		11/09/2023	11/09/2023	\$34,936.66	\$34,936.66	\$34,936.66
<input type="checkbox"/>	Test, Supervisor Approver	August 2023 Conference Christa Beemer		11/09/2023	11/09/2023	\$663.50	\$663.50	\$663.50



To open a request or report from these screens, click on the line for the request or report in question.





### Travel to Super Cool Conference [Text: Stacy]

Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email

#### Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Int...	City of Purcha...	Payment Type
10/04/2023	Meal Per Diem			Atlanta, Georgia	Out of Pocket
10/04/2023	Incidentals Per...			Atlanta, Georgia	Out of Pocket
10/03/2023	Meal Per Diem			Atlanta, Georgia	Out of Pocket
10/03/2023	Incidentals Per...			Atlanta, Georgia	Out of Pocket
10/02/2023	Hotel	Holiday Inn		Atlanta, Georgia	Out of Pocket
10/02/2023	Airfare	1Time Airline		Manhattan, Ka...	Out of Pocket
10/02/2023	Travel-Related ...	Cool Conferen...		Atlanta, Georgia	Out of Pocket
10/02/2023	Car Rental	Enterprise		Atlanta, Georgia	Out of Pocket
10/02/2023	Incidentals Per...			Atlanta, Georgia	Out of Pocket
10/02/2023	Meal Per Diem			Atlanta, Georgia	Out of Pocket

#### Summary

#### Report Summary

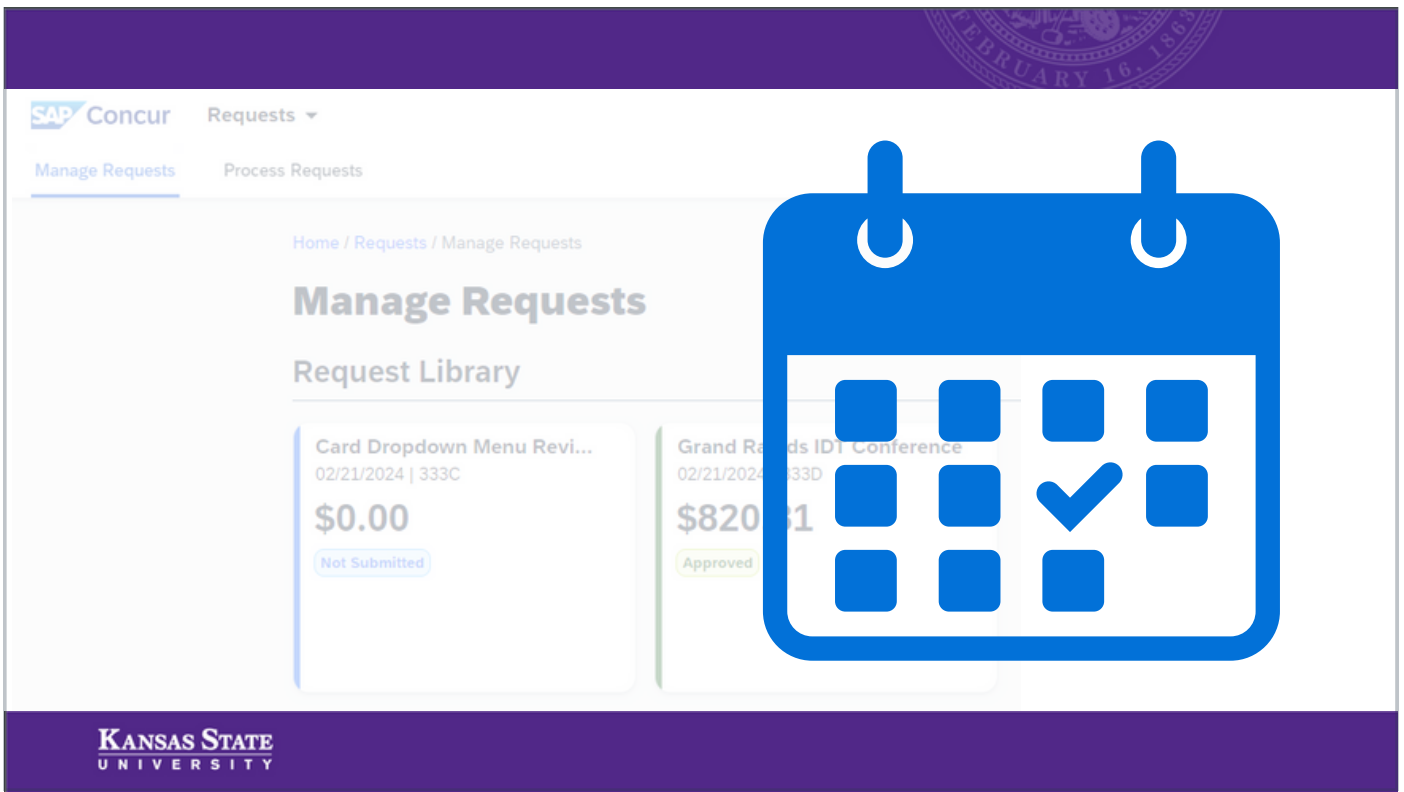
Report Totals	Amount Due Company
	\$0.00

#### Requests (1)

Request Name	Request ID	Amount Approved
Travel to Super Cool Conference	3369	\$4,000.00

TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

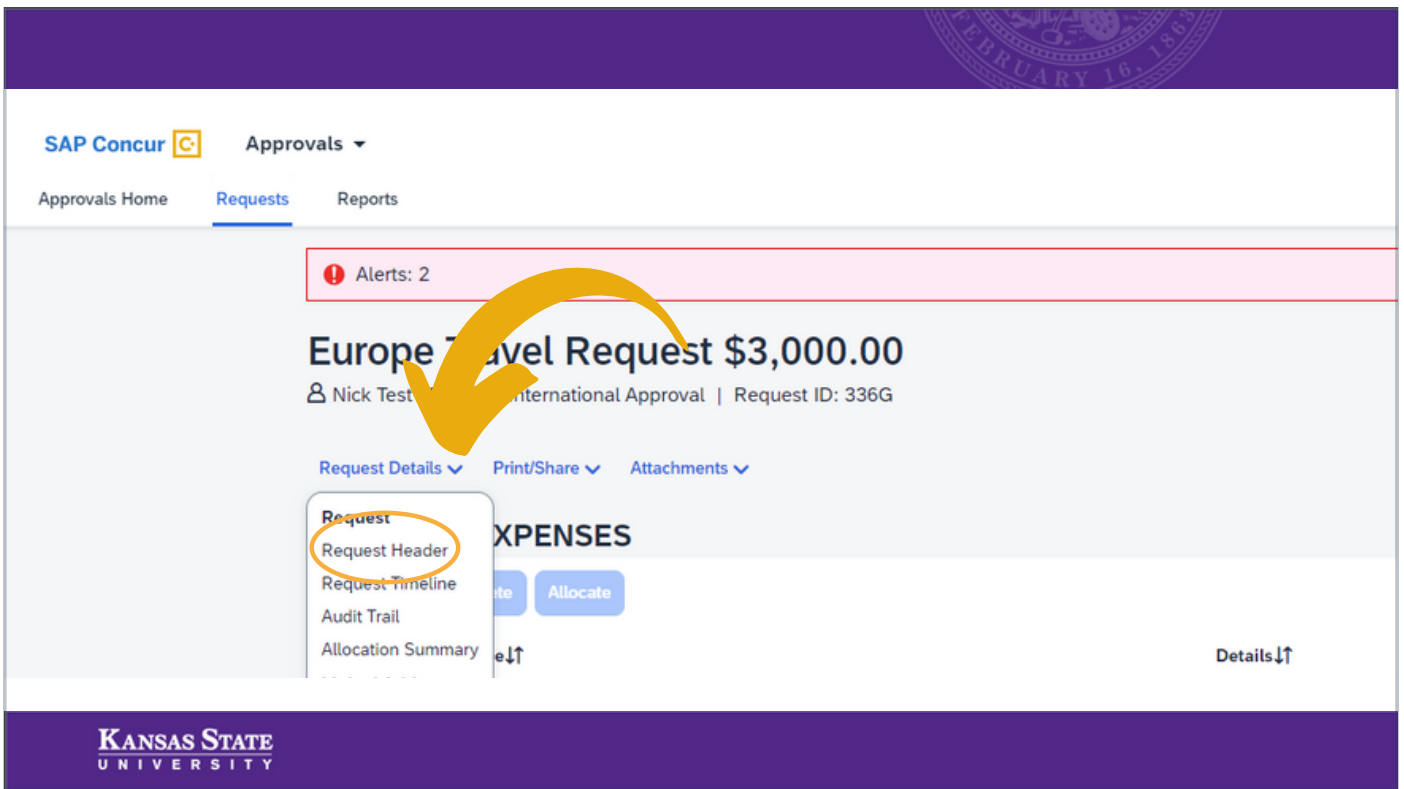
The applicable request or report will then open to a screen that allows you to view details of the request or report. From here, you can begin the approval process, which varies between supervisors and department heads because each has a unique function.



As mentioned earlier, supervisors are part of the travel request approval process and are concerned with the dates of travel in relation to how the traveler's absence during those dates affects the department.

The screenshot shows the 'Edit Request Header' form in SAP Concur. The form is titled 'International Conference | Request ID: 336T'. The 'Request Type' is '\*Credit Card Request'. The 'Request/Trip Name' is 'International Conference'. The 'Request/Trip Start Date' is '10/22/2023' and the 'Request/Trip End Date' is '10/28/2023'. The 'Request/Trip Purpose' is '1) Conference Attendee', the 'Trip Type' is '3) International', and the 'Trip Type' is '2) Staff'. The 'Destination City' is 'Londonderry, UNITED KINGDOM' and the 'Destination Country' is 'UNITED KINGDOM (GB)'. The start and end dates are circled in orange, and a yellow arrow points to them. The form has a 'Cancel' button and a 'Save' button. The SAP Concur logo is in the top left, and the Kansas State University logo is in the bottom left.

These dates are located on the request header,



which can be found by clicking on the Request Details dropdown menu and selecting Request Header.



Department heads are responsible for approving both requests and expense reports as delegated to them by the President of the University in accordance with university policy. Approvers may delegate their approval in Concur through the delegate functionality within their profile settings. Also, expense report approvals are defined by use of department funding. This means expense reports including funding from multiple departments will require approval from each of those departments.



SAP Concur Approvals CT

Approvals Home **Requests** Reports

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G More Actions Approve

Request Details Print/Share Attachments

#### EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/> Expense type↑↓	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/> Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				<b>\$3,000.00</b>

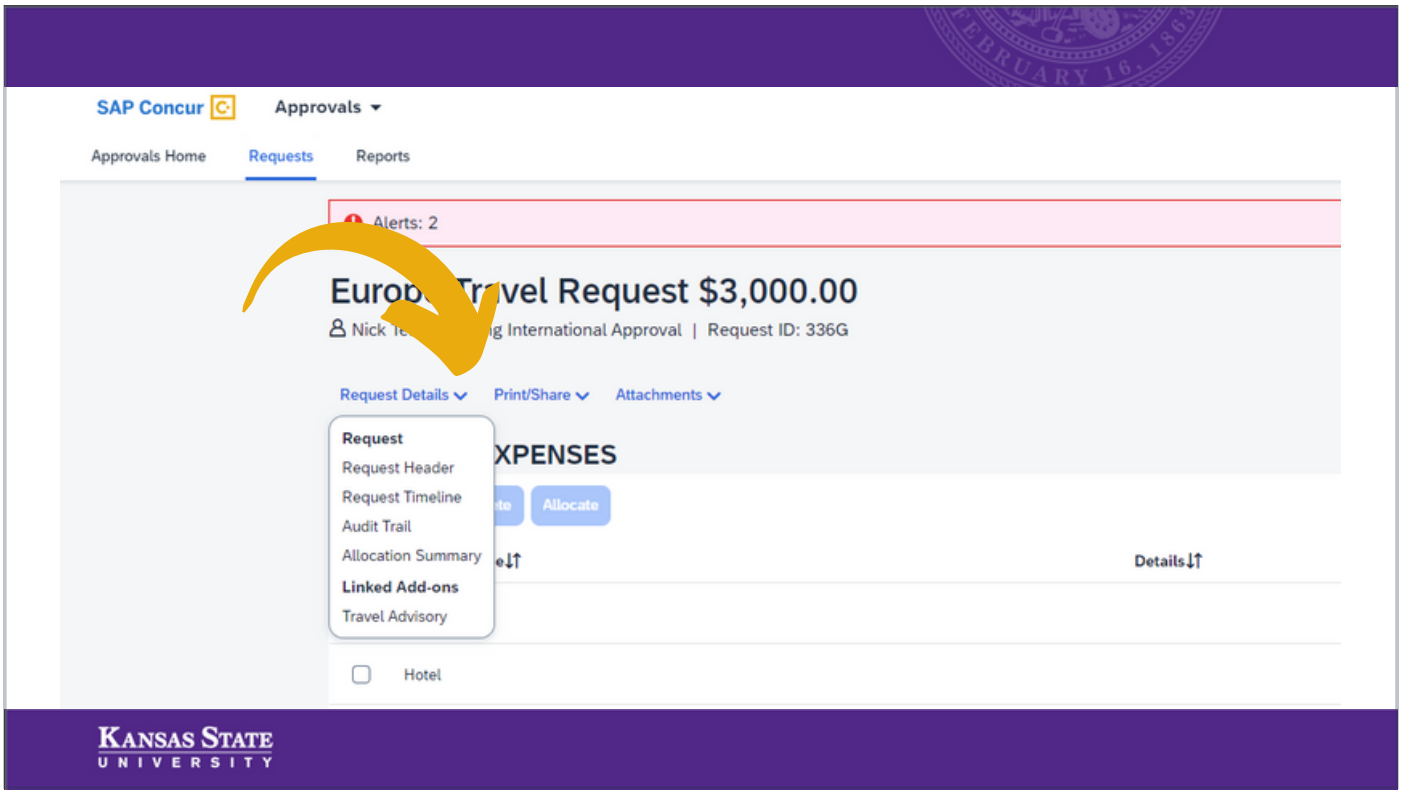
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To begin approving a report or request, on the screen that shows the expenses, you can see the individual expenses

The screenshot shows the SAP Concur 'Approvals' page for a 'Europe Travel Request' with a total amount of \$3,000.00. The request is pending international approval and has a request ID of 336G. The 'EXPECTED EXPENSES' table lists 'Airfare' and 'Hotel' as expense types, each with a requested amount of \$1,500.00. A large yellow arrow highlights the flow from the individual expense rows to the total amount of \$3,000.00.

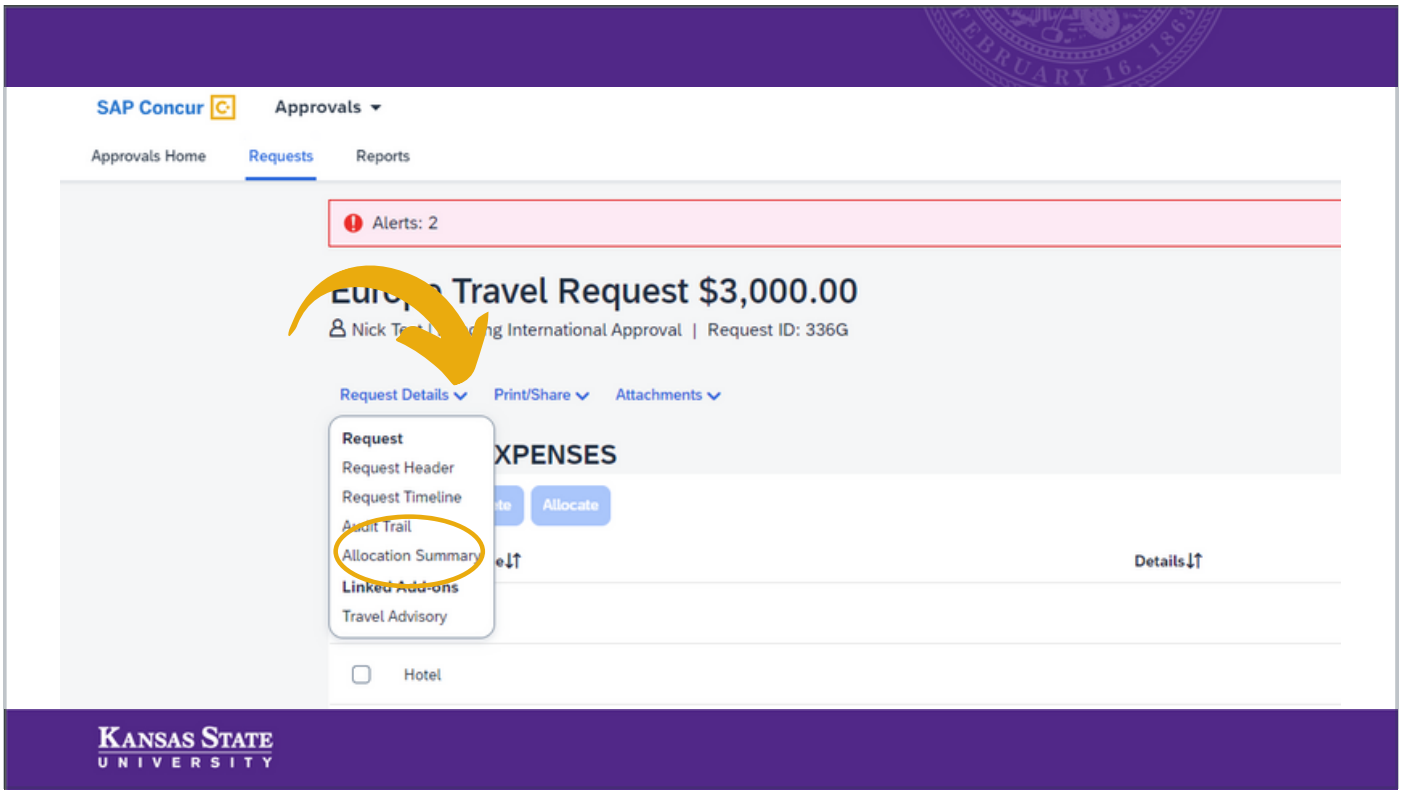
Expense type	Details	Requested
<input type="checkbox"/> Airfare		\$1,500.00
<input type="checkbox"/> Hotel		\$1,500.00
		<b>\$3,000.00</b>

and the total.



Additional details are available under the Request/Report Details dropdown menu.





This includes the Allocation Summary



SAP Concur Approvals

Europe Travel Request | \$3,000.00

The sum of allocation amounts may not exactly match the expense amount due to rounding.

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request

Request Details | Print/Share | Attachments

#### EXPECTED EXPENSES

Add Edit Delete Allocate

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

Code

90001-90001-NKSUDFAULT-90001-NKSUDFAULT-20110-90001-NKSUDFAULT-20110-NOAWRD-90001-NKSUDFAULT-20110-NOAWRD-2080

Test Department 1 - Default Project - Default PCA - Default Award - Default Funding for Department 1

Amount: \$3,000.00

Close

More Actions | Approve

KANSAS STATE UNIVERSITY

which allows you to see the fund sourcing for the request.

The screenshot displays the SAP Concur interface for a travel request. At the top, there is a navigation bar with 'SAP Concur' and 'Approvals Home' links. A yellow arrow points to an 'Alerts: 2' notification in a pink bar. Below this, the main title is 'Europe Travel Request \$3,000.00' with a status of 'Pending International Approval' and 'Request ID: 336G'. A 'More Actions' dropdown and an 'Approve' button are visible. The left sidebar contains a menu with options like 'Request Details', 'Print/Share', and 'Attachments'. The main content area is titled 'EXPENSES' and features a table with columns for 'Details', 'Date', 'Amount', and 'Requested'. The table lists two expense items, each for \$1,500.00 on 10/15/2023, with a total of \$3,000.00. The bottom of the page features the Kansas State University logo.

Alerts regarding the request/report are noted near the top of the screen.

SAP Concur Approvals

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

Request Details | Print/Share | Attachments

Request

Request Header

Request Timeline

Audit Trail

Allocation Summary

Linked Add-ons

Travel Advisory

EXPENSES

Allocate

	Details	Date	Amount	Requested
		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				<b>\$3,000.00</b>

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For both supervisors and department heads, once you have reviewed all aspects of a request/report, you have the options to approve it or send it back to the employee.



A word of caution on sending things back to the employee, though:



Sending the request/report back to the employee causes the entire workflow process to start over—and there are times some changes may be made without the report having to be sent back.



## Send Back to Employee

- incorrect expense amounts
- itemization errors
- missing expenses
- inapplicable expenses

A request/report does need to be sent back to the employee when an expense amount is incorrect, expenses need to be itemized, expenses are missing, and/or expenses are listed that should not be included on the report.

Send Back to Employee

- incorrect expense amounts
- itemization errors
- missing expenses
- inapplicable expenses

~~Send Back to Employee~~

- missing receipts/documentation
- missing information

A report does not need to be sent back when documentation or information is missing. The traveler is able to attach items such as receipts and documents even after the report is submitted.





- missing receipts/documentation
- missing information

If the reason you cannot approve the request is something that can be corrected without sending the report back, email the employee to request the necessary change.

The screenshot shows the SAP Concur interface for an Approvals page. At the top, there is a purple header with the SAP Concur logo and 'Approvals' with a dropdown arrow. Below this, there are navigation links for 'Approvals Home', 'Requests' (which is underlined), and 'Reports'. A red alert banner at the top indicates 'Alerts: 2'. The main content area features a large heading 'Europe Travel Request \$3,000.00' and a sub-heading 'Nick Test | Pending International Travel | Request ID: 3306'. Below the heading are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. The 'Print/Share' dropdown is open, showing a list of options, with '\*KSU-Travel Request Printed Report' highlighted. Below the dropdown are four buttons: 'Add', 'Edit', 'Delete', and 'Allocate'. Underneath these buttons is a table with two rows. The first row has a checkbox, the text 'Expense type', and a 'Details' link with up/down arrows. The second row has a checkbox and the text 'Airfare'. At the bottom of the page is a purple footer with the 'KANSAS STATE UNIVERSITY' logo.

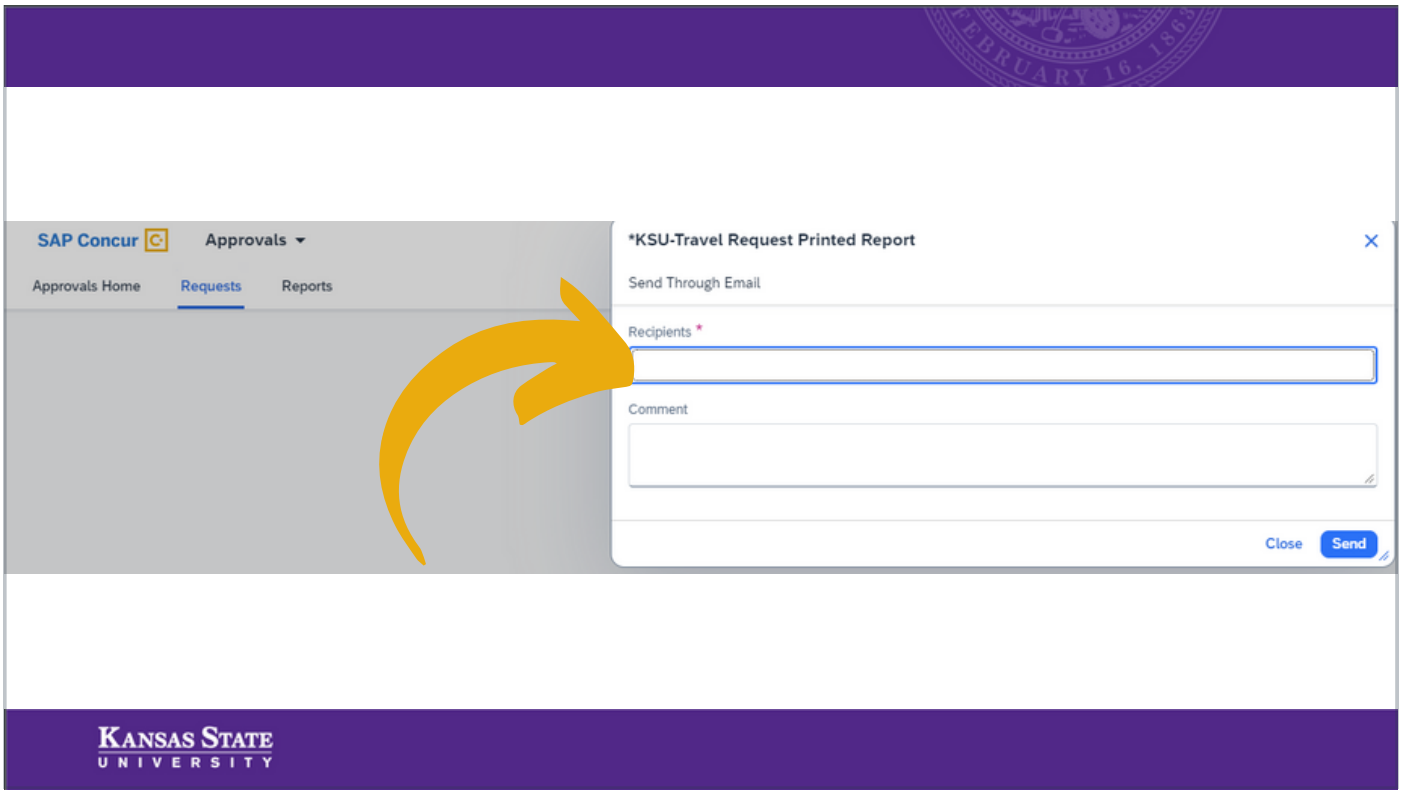
You can email the employee in Concur by clicking on the Print/Share dropdown menu and selecting KSU Travel Request/Report Printed Report.

The screenshot displays the SAP Concur 'Approvals' interface. A report window titled 'Booking Business Travel' is open, showing the following details:

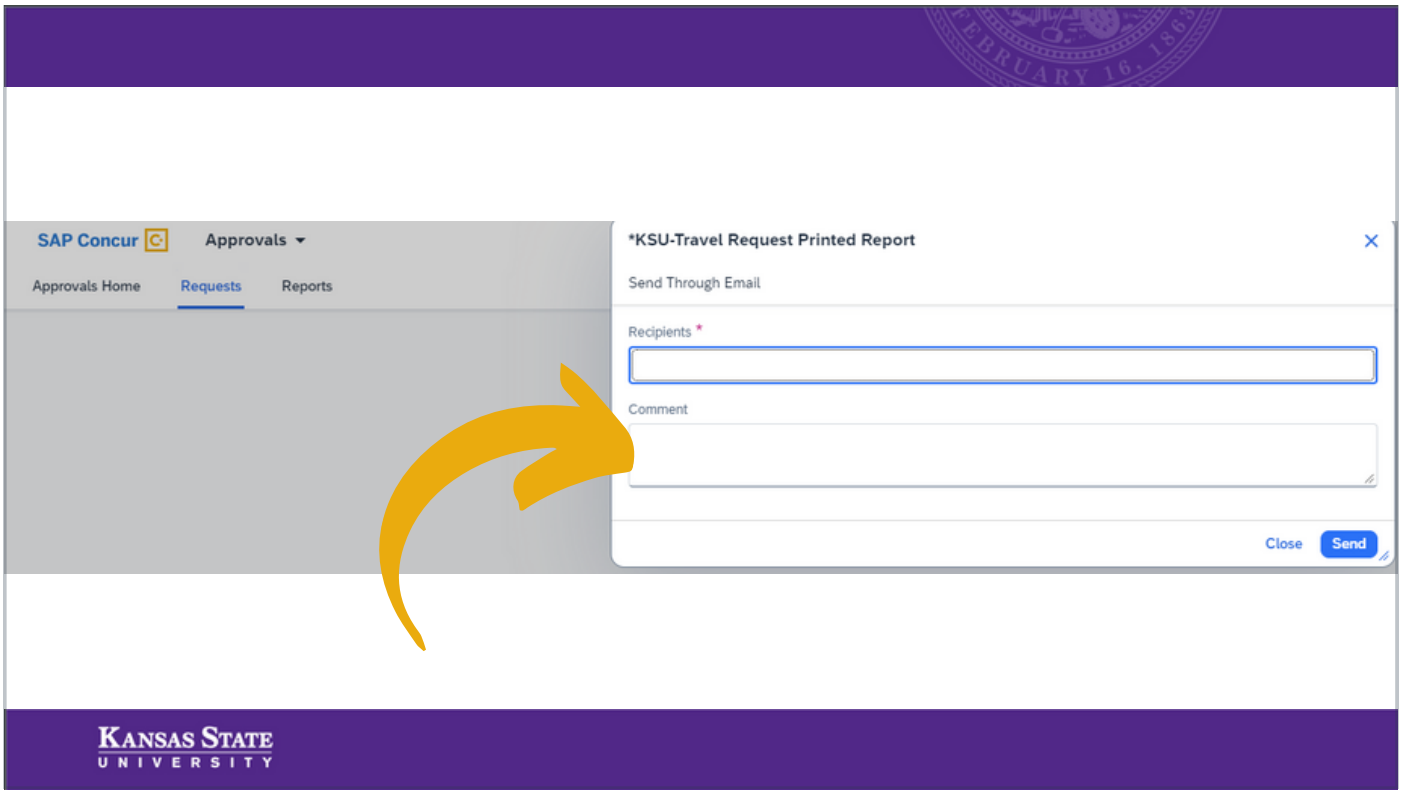
- Request ID: 336G
- Approval Status: Pending International Approval
- List of Request Exceptions: Message: One or more Cost objects could not be approved by the right authority (%costObject%). The request has been moved to the next workflow step. Request requires International Approval.
- Employee Name: Test, Nick
- Email Address: NickTest@state.edu.uat
- Default Manager Name: Test Approver 1, Department Head
- Default Manager Email: dh1@ksu.edu.uat
- Country/Region of Residence: UNITED STATES
- \*Department: Test Department 1
- \*Project: Default Project
- \*PCA: Default PCA
- \*Award: Default Award
- \*Fund Source: Default Funding for Department 1
- Sender Name: Test, Nick

At the bottom right of the report window, there are four buttons: 'Close', 'Print', 'Save as PDF', and 'Email'. A yellow arrow points to the 'Email' button. The interface also shows 'THE BEST RUN SAP' logo, 'SAP Co' text, and a footer with 'KANSAS STATE UNIVERSITY' and '© Copyright 2023 - SAP Concur - All Rights Reserved'.

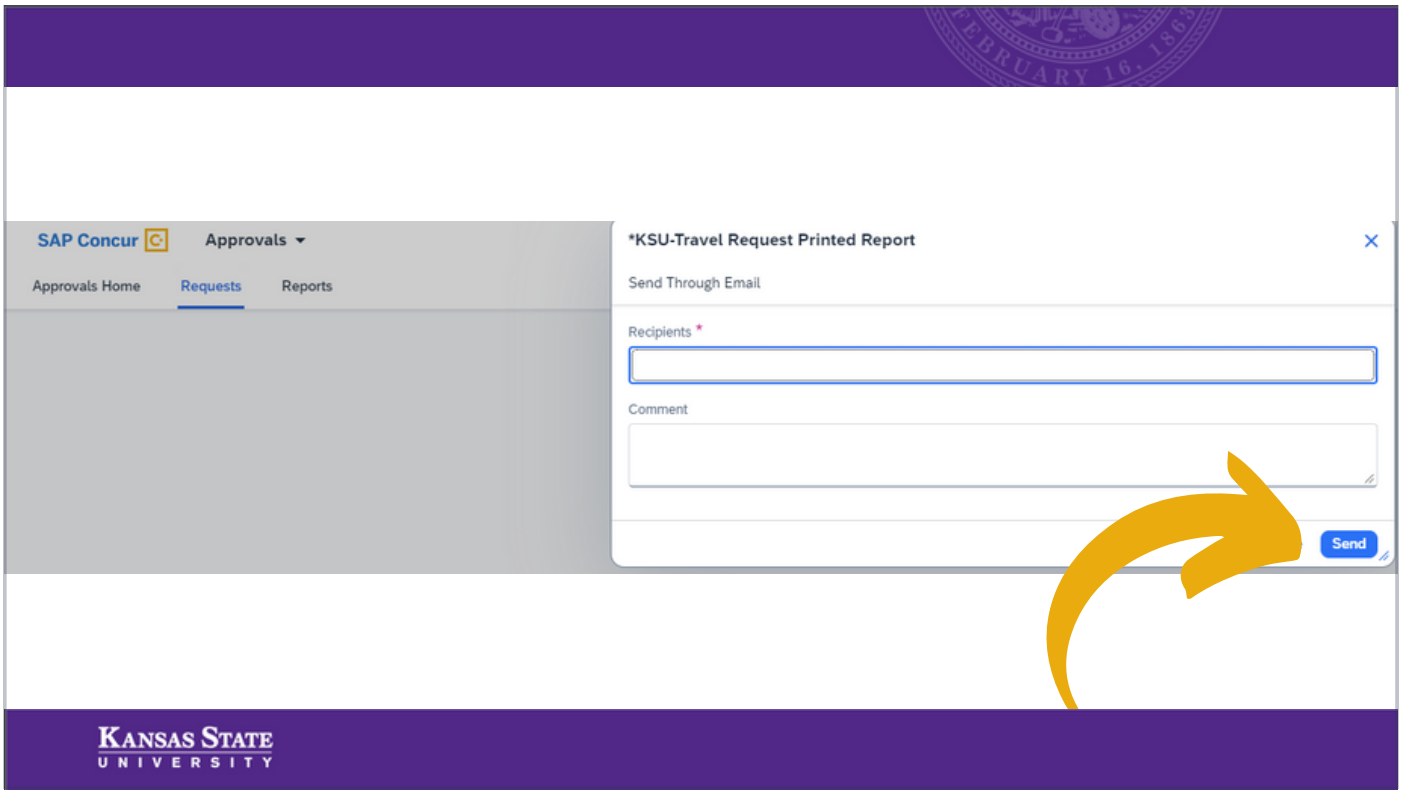
When the report window opens, click the Email button in the bottom right corner of that window.



Enter the email address of the employee,



and add a comment explaining what needs to be added or clarified.



Then click Send.

SAP Concur Approvals

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

Request Details | Print/Share | Attachments

#### EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00

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If the reason the report cannot be approved is something that does require the report to be sent back to the employee, click the More Actions dropdown menu and the Send Back to Employee option.

The screenshot displays the SAP Concur Approvals interface. At the top, there is a navigation bar with 'SAP Concur' and 'Approvals' menus. Below this, there are tabs for 'Approvals Home', 'Requests', and 'Reports'. A notification bar indicates 'Alerts: 2'. The main content area shows a 'Europe Travel Request \$3,000.00' by 'Nick Test' in a 'Pending International Approval' state. A 'Comment History' pop-up window is open, showing 'No comments.' and an 'Add Comment' section with a text input field labeled 'Reason for Sending Back the Request\*'. A large yellow arrow points to this input field. Below the pop-up, there are buttons for 'Cancel' and 'Send Back'. The 'EXPECTED EXPENSES' section includes a table with columns for 'Expense type', 'Date', 'Amount', and 'Requested'. The table lists 'Airfare' and 'Hotel' expenses, each for \$1,500.00, totaling \$3,000.00. The bottom of the page features the 'KANSAS STATE UNIVERSITY' logo.

In the comments box, which is a required field, explain why the request is being sent back so the employee understands what needs to be changed or happen next.



SAP Concur Approvals

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

More Actions Approve

Request Details Print/Share Attachments

#### EXPECTED EXPENSES

Add Edit Delete Allocate

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Airfare	10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel	10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

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If the report is good to be approved, you can either click the Approve button

SAP Concur Approvals

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

Request Details | Print/Share | Attachments

#### EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00

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or, if you need to insert an additional approver into the approval workflow, you can do that at this point by clicking the More Actions dropdown menu and selecting Approve and Forward. For more details on this process, please refer to our Adding an Approver to the Workflow training videos.

SAP Concur Approvals

Alerts: 2

### Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

More Actions Approve

Request Details Print/Share Attachments

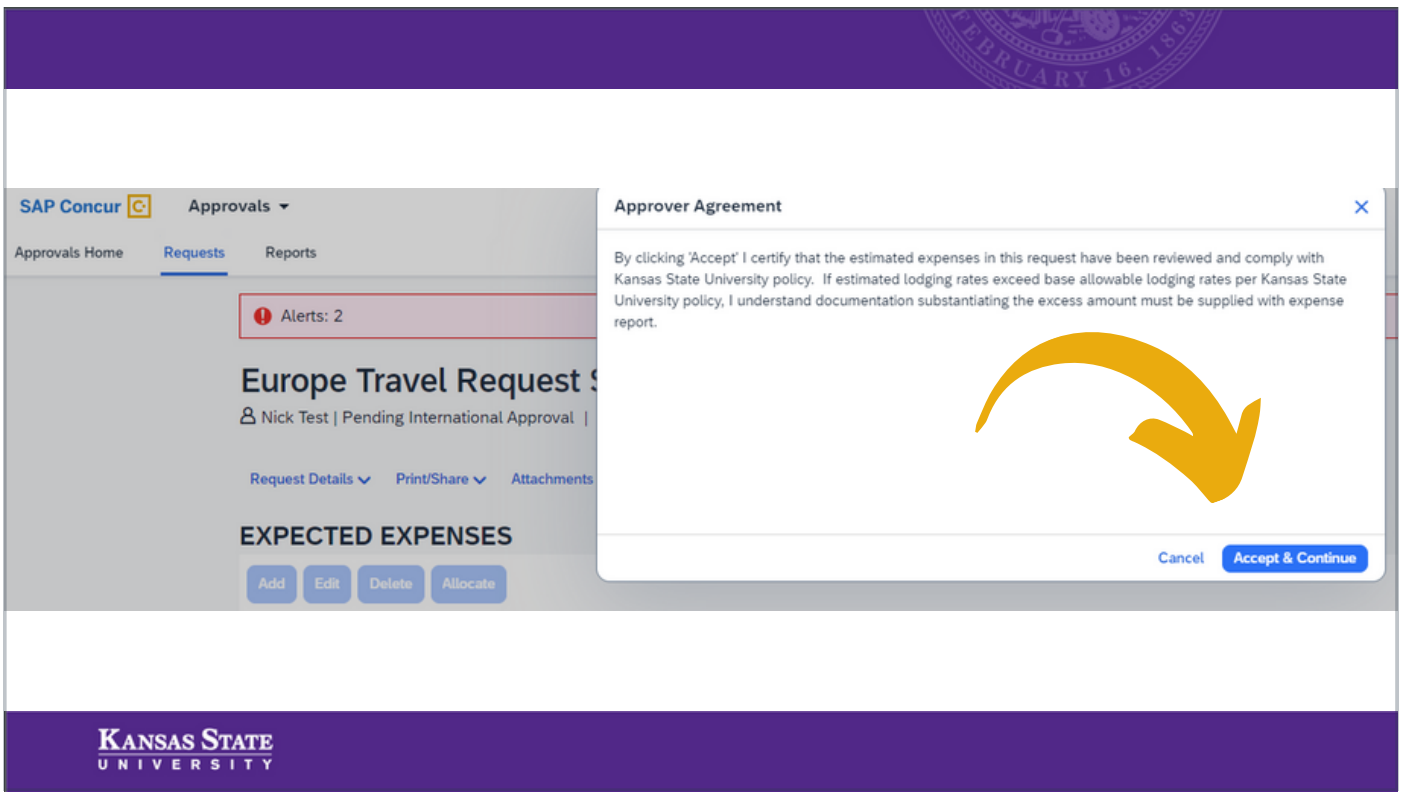
#### EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/> Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				<b>\$3,000.00</b>

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Once you click Approve,



The Approver Agreement will appear. Review and acknowledge the terms of the electronic submission. Clicking Approve serves as your electronic signature. And the approval is complete.



Do we have any questions regarding that approval process?



# Business Liaison Responsibilities

Moving next to the responsibilities of business liaisons,



Alerts: 1

### Final WFL BL Submit 0104 \$3.00

Delete Report Copy Report Submit Report

Not Submitted | Report Number: W7F9KE

# Review

REQUEST

Approved  
\$3.00

Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Out of Pocket	Parking	Topeka, Kansas	01/04/2024	\$3.00
							\$3.00

The primary function of business liaisons is to review the requests and reports to ensure data is accurate and complete. The process for reviewing requests is very similar to reviewing reports, other than the fact that the appearance of some of the screens is different. Because the report review is more in-depth, we're going to go through that process now, but for specific details on reviewing card and travel requests, we do have training videos available on those topics.



# August 2023 Travel Reimbursement [Test, Supervisor Approver]

Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email

## Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	Adjusted Clai...
08/30/2023	Professional Material and Supplies	GameStop		Tulsa, Oklahoma	Out of Pocket	\$34,000.00	\$34,000.00
08/16/2023	Personal Car Mileage				Out of Pocket	\$261.35	\$261.35
08/15/2023	Personal Car Mileage				Out of Pocket	\$206.98	\$206.98
08/01/2023	Personal Car Mileage				Out of Pocket	\$206.98	\$206.98
08/01/2023	Personal Car Mileage				Out of Pocket	\$261.35	\$261.35
<b>TOTAL AMOUNT</b>						<b>\$34,936.66</b>	<b>\$34,936.66</b>

### Report Summary

Report Totals

Amount Due Company	Amount Due Employee
\$0.00	\$34,936.66

### Requests (1)

Request N...	Request ID	Amount A...	Amount R...
August 202...	33HQ	\$468.33	\$-468.33



To start the review process, at the top of the screen that allows you to view details of the report,



 Alerts: 2 



look for any alerts or warnings. These need to be addressed as part of your review.



One of the most important aspects of your review as business liaisons

### Allocate

Expenses: 1 | \$3.00

Percent

Amount

\$3.00

Default Allocation

Code

90001-NKSUDFAULT-10-NOAWRD-2080



is to make sure the allocations for all expenses are correct and that they are not set to default funding. All expenses start out with a default funding string. If this default funding string is still set or if the allocation is incorrect at the point of your review, change the allocation to the funding string appropriate to the department and expense.

Send Back to Employee



This is important because, if this funding string is not set appropriately and the report gets sent back to the employee later in the workflow as a result, the return of the report to the employee requires the entire workflow process to start over.

SAP Concur Approvals

Approvals Home Requests Reports

# August 2023 Travel Reimbursement [Test, Supervisor Approver]

Summary Details Receipts Print / Email

**Expenses**

- Report
- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Allocations
- Allocations

View <<

Expense Type	Enter Vendor ...	Additional Inf...	C
Professional M...	GameStop		T
Personal Car ...			
Personal Car ...			
Personal Car ...			
Personal Car ...			

**Report Summary**

Report Totals

**Requests (1)**

- > Request Name
- > August 2023 Travel Reimbursement

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To view the allocations, click on the Details dropdown menu and select Allocations.

SAP Concur Approvals

Approvals Home

Allocations for Report: August 2023 Travel Reimbursement

### Expense List

Allocate Selected Expenses Clear Selections **Summary**

Select Group

<input type="checkbox"/>	Date	Expense Type	Group	Amount
<input type="checkbox"/>	08/01/2023	Personal Car ...		\$206.98
<input type="checkbox"/>	08/01/2023	Personal Car ...		\$261.35
<input type="checkbox"/>	08/15/2023	Personal Car ...		\$206.98
<input type="checkbox"/>	08/16/2023	Personal Car ...		\$261.35
<input type="checkbox"/>	08/30/2023	Professional ...		\$34,000.00

### Allocations

Allocate By: | Add New Allocation

<input type="checkbox"/>	Percentage	* Department
--------------------------	------------	--------------

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On the Allocations Expense List window that opens, click the Summary button.



SAP Concur Approvals

Approvals Home

Allocations for Report: August 2023 Travel Reimbursement

### August 2023 Expense List

Allocate Selected Expenses

Select Group

Department	Project	PCA	Award	Fund Source	Department Ide...	Amount
(25020) Accounting	(NBAACOLFEE) B...	(20110) General ...	NOAWRD	(2000) GENERAL ...		\$34,936.66

Expenses

Transaction
08/30/2023
08/16/2023
08/15/2023
08/01/2023
08/01/2023

Close

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The Summary page will allow you to quickly view all allocations currently assigned to the report.



Allocations for Report: August 2023 Travel Reimbursement

### Expense List

Allocate Selected Expenses

Clear Selections

Summary

Select Group ▼

<input type="checkbox"/>	Date	Expense Type	Group	Amount
<input type="checkbox"/>	08/01/2023	Personal Car ...		\$206.98
<input type="checkbox"/>	08/01/2023	Personal Car ...	1	\$261.35
<input type="checkbox"/>	08/15/2023	Personal Car ...		\$206.98
<input type="checkbox"/>	08/16/2023	Personal Car ...		\$261.35
<input type="checkbox"/>	08/30/2023	Professional ...		\$34,000.00

### Allocations

Allocate By: ▼

Add New Allocation

Percentage \* Department \* I

To change an allocation, on the Allocations Expense List screen, click on the expense or expenses you wish to allocate.





Allocations for Report: August 2023 Travel Reimbursement

### Expense List

Allocate Selected Expenses

Clear Selections

Summary

Select Group

<input checked="" type="checkbox"/>	Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	08/01/2023	Personal Car ...		\$206.98
<input checked="" type="checkbox"/>	08/01/2023	Personal Car ...	1	\$261.35
<input checked="" type="checkbox"/>	08/15/2023	Personal Car ...		\$206.98
<input checked="" type="checkbox"/>	08/16/2023	Personal Car ...		\$261.35
<input checked="" type="checkbox"/>	08/30/2023	Professional ...		\$34,000.00

### Allocations

Allocate By: ▼

Add New Allocation

Delete Selected Allocation

<input type="checkbox"/>	Percentage	* Department	* Project	* PC
--------------------------	------------	--------------	-----------	------

Then click on the Allocate Selected Expenses button near the top left of the screen.



Allocations for Report: August 2023 Travel Reimbursement

### Expense List

Allocate Selected Expenses Clear Selections Summary

Select Group

<input checked="" type="checkbox"/>	Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	08/01/2023	Personal Car ...		\$206.98
<input checked="" type="checkbox"/>	08/01/2023	Personal Car ...	1	\$261.35
<input checked="" type="checkbox"/>	08/15/2023	Personal Car ...		\$206.98
<input checked="" type="checkbox"/>	08/16/2023	Personal Car ...		\$261.35
<input checked="" type="checkbox"/>	08/30/2023	Professional ...		\$34,000.00

### Allocations

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage \* Department \* Project \* PCA \* Award \* Fund Source Department Id... Co

#### Please Confirm

Some of the selected expenses have already been allocated. Allocating them again will overwrite the previous allocations. Do you want to proceed?

Yes No



If you see a message informing you that allocating these expenses will overwrite existing allocations, make sure you have reviewed the allocations already assigned. To proceed, click Yes.



Allocations for Report: August 2023 Conference



### Expense List

Allocate Selected Expenses Clear Selections Summary

Select Group

<input type="checkbox"/>	Date	Expense ...	Group	Amount
<input checked="" type="checkbox"/>	08/16/2023	Meal Per ...		\$40.50
<input type="checkbox"/>	08/16/2023	Incidental...		\$3.75
<input type="checkbox"/>	08/15/2023	Travel-Rel...		\$250.00
<input type="checkbox"/>	08/15/2023	Rental Car...		\$25.00
<input type="checkbox"/>	08/15/2023	Meal Per ...		\$40.50
<input type="checkbox"/>	08/15/2023	Incidental...		\$3.75
⊖ Hotel				
<input type="checkbox"/>	08/15/2023	Hotel		\$300.00

### Allocations

Total:\$40.50 Allocated:\$40.50 (100%) Remaining:\$0.00 (0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

<input type="checkbox"/>	Percentage	* Department	* Project	* PCA	* Award	* Fund Source	Department Id...	Code
<input type="checkbox"/>	100	(25020) Acco...	(NBAACOLFE...	(20110) Gene...	NOAWRD	(2000) GENE...		25020-NBAAC...

Save Cancel

Done



The Allocations window will populate.

Allocations for Report: August 2023 Conference

Total:\$40.50 Allocated:\$40.50 (100%) Remaining:\$0.00 (0%)

**Expense List**

Allocate Selected Expenses Clear Selections Summary

Select Group

Date	Expense	Group	Amount
<input type="checkbox"/>	08/16/2023	Meal Per ...	\$40.50
<input type="checkbox"/>	08/16/2023	Incidental...	\$3.75
<input type="checkbox"/>	08/15/2023	Travel-Rel...	\$250.00
<input type="checkbox"/>	08/15/2023	Rental Car...	\$25.00
<input type="checkbox"/>	08/15/2023	Meal Per ...	\$40.50
<input type="checkbox"/>	08/15/2023	Incidental...	\$3.75
Hotel			
<input type="checkbox"/>	08/15/2023	Hotel	\$300.00

**Allocations**

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage	Department	Project	PCA	Award	Fund Source	Department Id...	Code
<input type="checkbox"/>	100	(25020) Acco...	(NBAACOLFE...	(20110) Gene...	NOAWRD	(2000) GENE	25020

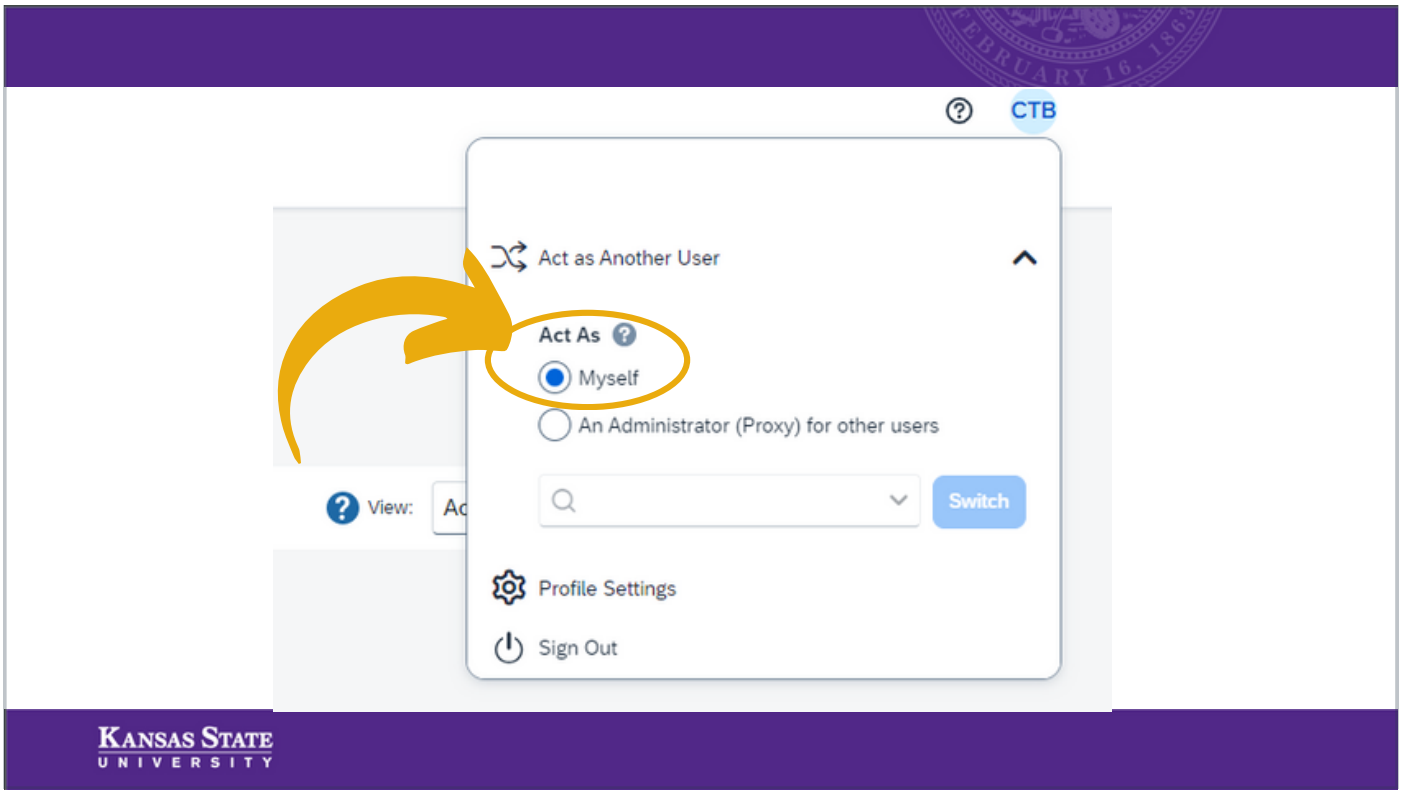
Add to Favorites N/A

**Training Tip!**

Save Cancel Done

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Here's an important tip that will help you with this process. Once a request or report is in the approval workflow, you do not have the ability to set favorite allocations from there—but you can access pre-existing favorites you have already established in your own profile.



To set these up, make sure you are under your profile—acting as yourself—and create a mock expense report.



Home / Expense / Manage Expenses / Mock Expense Report

## Mock Expense Report \$225.00

Delete Report Copy Report Submit Report

Not Submitted | Report Number: NLCBKH

Report Details Print/Share Manage Receipts Travel Allowance

View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

View: Standard

<input checked="" type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>		Out of Poo	Airfare	Fly Me There Inc Chicago, Illinois	02/13/2024	\$225.00	...
						\$225.00	

Add an expense to this report, and click to allocate it.

The screenshot shows the SAP Concur Expense interface. On the left, the 'Allocate' section displays 'Expenses: 1 | \$225.00'. Below this, there are tabs for 'Percent' and 'Amount', and a table with columns for 'Amount' and 'Default Allocation'. The 'Amount' is \$225.00. The 'Default Allocation' section shows a 'Code' of '05040-NKSUDFAULT-20110-NOAWRD-2080' and buttons for 'Add', 'Edit', 'Remove', and 'Save as Favorite'. On the right, the 'Add Allocation' dialog box is open. It has two tabs: 'New Allocation' (selected) and 'Favorite Allocations'. The 'New Allocation' tab contains four required fields: 'Department \*' (05040) Division of Financial Services, 'Project \*' (NKSUDFAULT) KSU DFAULT, 'PCA \*' (20110) General Academic Instruction - Instruction, and 'Award \*' NOAWRD. A yellow arrow points from the 'PCA' field to the 'Save' button. The dialog also has 'Cancel' and 'Save' buttons at the bottom right.

Set the allocation and save it to the expense;



SAP Concur Expense

### Allocate

Expenses: 1 | \$225.00 | [View Allocation Group](#)

Percent | Amount

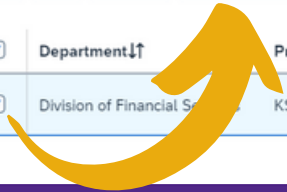
Amount: \$225.00 | Allocated \$225.00 | 100%

Default Allocation

Code: 05040-NKSUDFAULT-20110-NOAWRD-2080

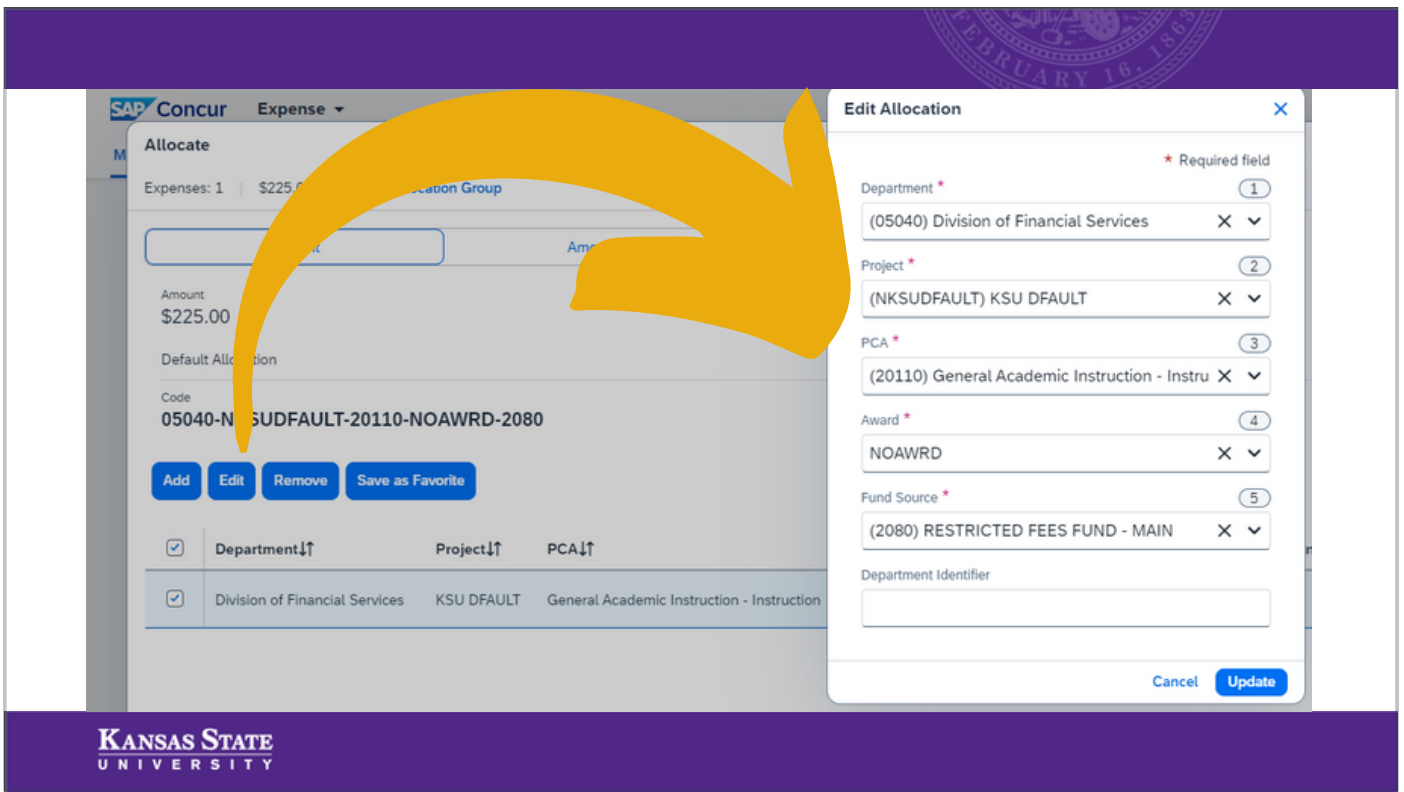
[Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

<input checked="" type="checkbox"/>	Department↑↓	Project↑↓	PCA↑↓	Award↑↓	Fund Source↑↓
<input checked="" type="checkbox"/>	Division of Financial Services	KSU DFAULT	General Academic Instruction - Instruction	NOAWRD	RESTRICTED FEE



Then save it as a favorite.





To add another, click Edit and edit that expense allocation



SAP Concur Expense

### Allocate

Expenses: 1 | \$225.00 | [View Allocation Group](#)

Percent | Amount

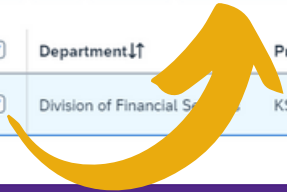
Amount: \$225.00 | Allocated \$225.00 | 100%

Default Allocation

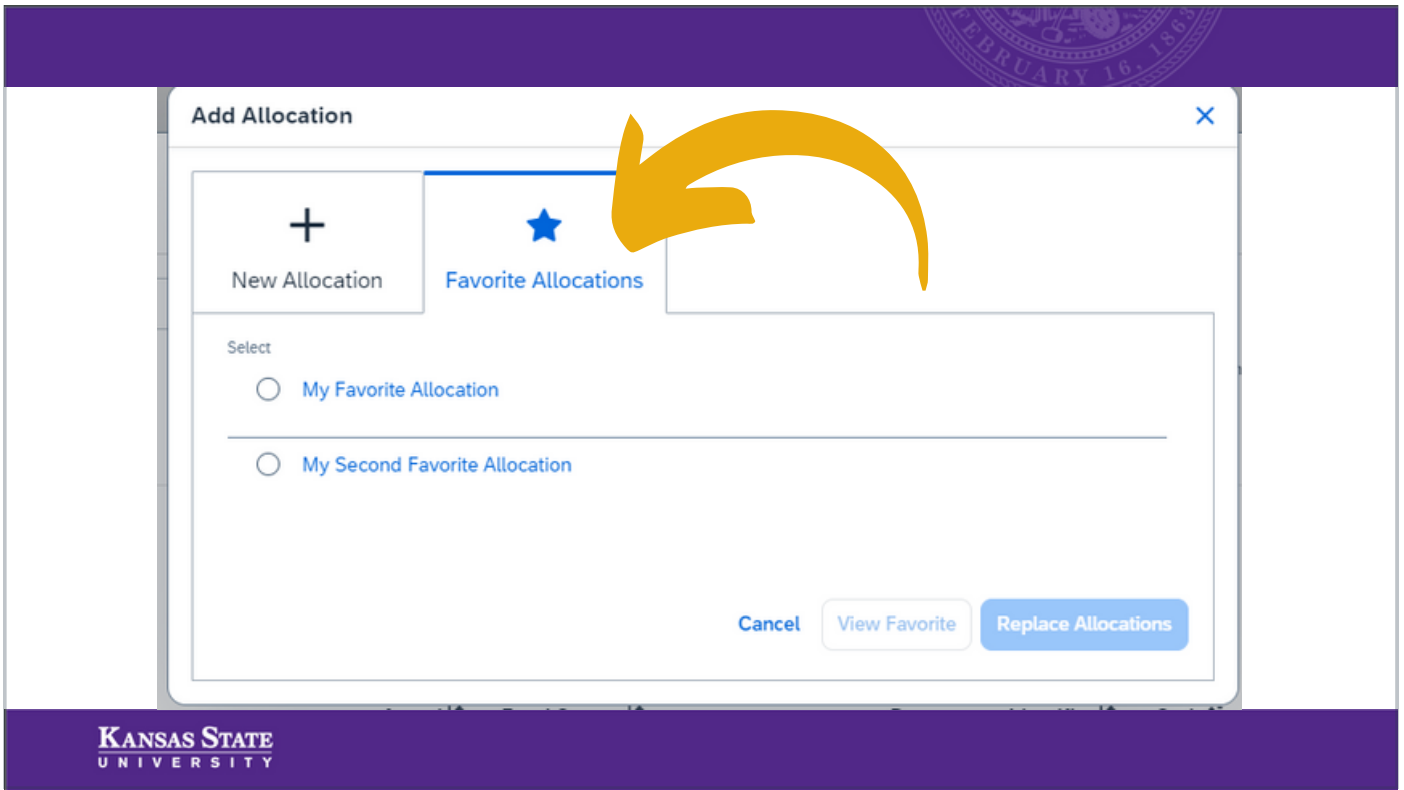
Code: 05040-NKSUDFAULT-20110-NOAWRD-2080

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

<input checked="" type="checkbox"/>	Department↑↓	Project↑↓	PCA↑↓	Award↑↓	Fund Source↑↓
<input checked="" type="checkbox"/>	Division of Financial Services	KSU DFAULT	General Academic Instruction - Instruction	NOAWRD	RESTRICTED FEE



and save it as a favorite.



Continue this process until you have added all your common allocations to the Favorite Allocations cache.



Home / Expense / Manage Expenses / Mock Expense Report

## Mock Expense Report \$225.00

Not Submitted | Report Number: NLCBKH

[Delete Report](#) [Copy Report](#) [Submit Report](#)



[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

[View Available Receipts](#)

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

View: [Standard](#)

<input checked="" type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input checked="" type="checkbox"/>		Out of Pocket	Airfare	Fly Me There Inc Chicago, Illinois	02/13/2024	\$225.00 Allocated	...
						\$225.00	

Then delete this mock report.

The screenshot displays the SAP Concur Approvals interface for 'Testing 0108'. It is divided into two main sections: 'Expense List' and 'Allocations'.

**Expense List:** Contains a table with columns: Date, Expense, Group, and Amount. One entry is visible: 01/08/2024, Computer, \$276.21.

**Allocations:** Shows a summary: Total: \$276.21, Allocated: \$276.21 (100%), Remaining: \$0.00 (0%). Below this is a table with columns: Percentage, Department, Project, PCA, Fund Source, Department Id..., and Code. One allocation is listed: 100%, (90001) Test..., (NKSUDFAUL..., (20110) Defa..., (2080) Defaul..., 90001-NKSUD....

A yellow arrow points to the 'Favorites' dropdown menu in the Allocations table's header.

Your favorite allocations will now be available for you to work with in your review process.

The screenshot displays the SAP Concur Approvals interface for 'Testing 0108'. It is divided into two main sections: 'Expense List' and 'Allocations'.

**Expense List:** Contains a table with columns for Date, Expense, Group, and Amount. One entry is visible: 01/08/2024, Computer, \$276.21.

**Allocations:** Shows a summary: Total: \$276.21, Allocated: \$276.21 (100%), Remaining: \$0.00 (0%). Below this is a table with columns for Percentage, Department, Project, PCA, Award, Fund Source, Department Id., and Code. A yellow arrow points to the table, which has six numbered columns (1-6) for funding strings.

Percentage	Department	Project	PCA	Award	Fund Source	Department Id...	Code
100	(90001) Test ...	(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defaul...		90001-NKSUD...

Buttons at the bottom include 'Save', 'Cancel', and 'Done'.

If you need to add a new allocation, fill in each of the 6 funding string fields with the applicable funding information

**Allocations** Total: \$276.21 Allocated: \$276.21 (100%) Remaining: \$0.00 (0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

* Department	* Project	* PCA	* Award	* Fund Source	Department Id...	Code
Test Departm	(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defaul...		90001-NKSUD...

Type to search by:

Text  Code  
(Code) Text

- (85530) Poly Prfsnl Educ & Outreach
- (85535) Poly Dept of UAS
- (85540) Poly Finance
- (85542) Poly Facilities
- (85543) Poly Operations
- (85544) Poly Information Technology
- (85545) Poly Auxiliary Svcs
- (85547) Poly Dept of Aviation
- (90001) Test Department 1

Save Cancel Done

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by clicking on the name of the funding string field and then searching for and selecting the appropriate option. Again, the default search setting is by code, but you can change this to text.

**Allocations**

Total: \$250.00 Allocated: \$250.00 (100%) Remaining: \$0.00 (0%)

Percentage	Department	Project	PCA	Award	Fund Source	Department Id...	Code
10	...	(GRP00388...	(21220) Indivi...	(BG5022) RP...	(3145) UNIV ...	They are payi...	03010-GRP0...
45	...	(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defaul...		90002-NKSUD...
45	(30005) Divisi...	NCASDRARA...	(20460) Acad...	NOAWRD	(2080) RESTR...		30005-NCASD...

1000-2023 Home Tax \$80.00

Save Cancel

TOTAL AMOUNT \$4,092.50 TOTAL REPORTED \$4,092.50

Save Allocate Search Receipt

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If there are multiple allocations and you need to change the percentage of funds divided between or among them, you can adjust the percentage





**Allocate By:** Percentage (selected), Amount (circled)

Percentage	Department	Project	PCA	Award	Fund Source	Department Id...	Code
20	(03010) Provo...	(GRP00388...	(21220) Indivi...	(BG5022) RP...	(3145) UNIV ...	They are payi...	03010-GRP0...
45	(90002) Testin...	(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defau...		90002-NKSUD...
45	Division of Ir...	(NCASDRARA...	(20460) Acad...	NOAWRD	(2080) RESTR...		30005-NCASD...

Or—to allocate by amount, click the Allocate By button and select amount.



SAP Concur Approvals

Travel to S

Expense List

Allocations

Total: \$250.00 Allocated: \$250.00 (100%) Remaining: \$0.00 (0%)

Percentage	Department	Project	PCA	Award	Fund Source	Department Id...	Code
10	(03010) Provi...	(GRP00388...	(21220) Indivi...	(BG5022) RP...	(3145) UNIV ...	They are payi...	03010-GRP0...
45	(90002) Testi...	(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defaul...		90002-NKSUD...
45	(30005) Divisi...	(NCASDRARA...	(20460) Acad...	NOAWRD	(2080) RESTR...		30005-NCASD...

Allocations Total: \$250.00 Allocated: \$250.00 (100%)

Allocate By: | Add New Allocation | Delete Selected Allocations | Favorites | Add to Favorites

Amount	Department	Project	PCA	Award	Fund Source	Department Id...	Code
\$25.00		(GRP00388...	(21220) Indivi...	(BG5022) RP...	(3145) UNIV ...	They are payi...	03010-GRP0...
\$112.50		(NKSUDFAUL...	(20110) Defa...	(NOAWRD) D...	(2080) Defaul...		90002-NKSUD...
\$112.50	(30005) Divisi...	(NCASDRARA...	(20460) Acad...	NOAWRD	(2080) RESTR...		30005-NCASD...

Save Cancel

TOTAL AMOUNT \$4,092.50 TOTAL RECALC \$4,092.50

Save Allocate Attach Receipt

Then adjust the amount values as needed.

The screenshot shows the SAP Concur 'Allocations' window for a report titled 'Travel to Super Cool Conference'. The window is divided into two main sections: 'Expense List' on the left and 'Allocations' on the right. The 'Expense List' contains a table of transactions with columns for Date, Expense, Group, and Amount. The 'Allocations' section features a table with columns for Percentage, Department, Project, PCA, Award, Fund Source, Department ID, and Code. A large yellow arrow points to the 'Save' button at the bottom right of the 'Allocations' table. At the bottom of the window, there are summary statistics: 'TOTAL AMOUNT \$4,092.50' and 'TOTAL REQUESTED \$4,092.50'. The background of the application shows a navigation menu with 'Travel to Super Cool Conference' selected and a 'Kansas State University' logo at the bottom.

Date	Expense	Group	Amount
10/04/2023	Meal Per ...		\$34.50
10/04/2023	Incidental...		\$2.50
10/04/2023	Meal Per ...		\$34.50
10/03/2023	Incidental...		\$2.50
10/02/2023	Airfare		\$750.00
10/02/2023	Travel-Rel...		\$2,500.00
10/02/2023	Car Rental	1	\$250.00
10/02/2023	Incidental...		\$1.25
10/02/2023	Meal Per ...		\$17.25
<b>Hotel</b>			
10/03/2023	Hotel		\$200.00
10/03/2023	Hotel Tax		\$50.00
10/02/2023	Hotel		\$200.00
10/02/2023	Hotel Tax		\$50.00

Percentage	Department	Project	PCA	Award	Fund Source	Department ID	Code
10	(03010) Prov...	(GRP/00388...	(21220) Indiv...	(BG5022) RP...	(3145) UNIV ...	They are pay...	03010-GRPVO...
45	(90002) Testi...	(NKSUDFAUL...	(20110) Defa...	(NOAWARD) D...	(2080) Defaul...		90002-NKSUD...
45	(30005) Divis...	(NCASDRARA...	(20460) Acad...	NOAWARD	(2080) RESTR...		30005-NCASD...

When finished, click save.

SAP Concur Requests ▾

Manage Requests

Home / Requests / Manage Requests / Travel Req 0108

## Travel Req 0108 \$180.30

Sent Back to Employee | Request ID: 33QN | [View](#)

Request Details ▾ Print/Share ▾ Attachments ▾ Manage Travel Allowance ▾

**EXPECTED EXPENSE:**

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

View Documents  
Attach Documents  
Delete Documents

<input type="checkbox"/>	Expense type↓↑	Details↓↑
<input type="checkbox"/>	Parking	Wichita, Kansas
<input type="checkbox"/>	Personal Car Mileage	Wichita, Kansas : Manhattan, KS, USA - Wichita, KS, USA

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Another part of your business liaison review is to ensure that any documentation associated with the report/expenses is attached. This includes receipts and such documents as the International Travel Registration, conference agendas or itineraries, the cost comparison spreadsheet, or any other documents the department may find helpful in showing the business purpose of the travel or expense. If documentation is missing,



- missing receipts/documentation
- missing information

remember it is not necessary to send back the expense report to the employee for the attachment to be added. Documentation can be attached to a report at any time.

Send Back to Employee



Sending the report back causes the workflow to start over.

Send Back to Employee

- incorrect expense amounts
- itemization errors
- missing expenses
- inapplicable expenses

~~Send Back to Employee~~

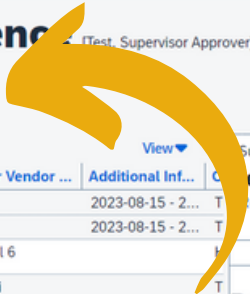
- missing receipts/documentation
- missing information

As a review, refer to this table to determine when a report does and does not have to be sent back for correction.



# August 2023 Conference [Test, Supervisor Approver]

Summary Details ▾ Receipts ▾ **Print / Email ▾**



## Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	C
	08/16/2023	Meal Per Diem		2023-08-15 - 2...	T
	08/16/2023	Incidentals Per...		2023-08-15 - 2...	T
>	08/15/2023	Hotel	Motel 6		T
	08/15/2023	Travel-Related ...	Omni		T
	08/15/2023	Rental Car/Ren...	Hertz		S
	08/15/2023	Meal Per Diem		2023-08-15 - 2...	T
	08/15/2023	Incidentals Per...		2023-08-15 - 2...	T

Report Summary	
Report Totals	Amount Due Company
	\$0.00

## Requests (1)

Request Name	Request ID
> August 2023 Conference	33HR

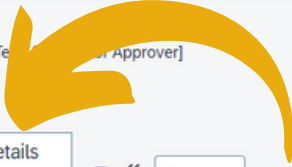
To request documentation from the employee, click on the Print/Email dropdown menu





# August 2023 Conference [Te... Approver]

Summary Details Receipts Print / Email



\*KSU-Travel Report Details

## Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	C
08/16/2023	Meal Per Diem		2023-08-15 - 2...	T
08/16/2023	Incidentals Per...		2023-08-15 - 2...	T
> 08/15/2023	Hotel	Motel 6		H
> 08/15/2023	Travel-Related ...	Omni		T
> 08/15/2023	Rental Car/Ren...	Hertz		S
08/15/2023	Meal Per Diem		2023-08-15 - 2...	T
08/15/2023	Incidentals Per...		2023-08-15 - 2...	T

Summary

## Report Summary

Report Totals

Amount Due Company  
\$0.00

## Requests (1)

Request Name	Request ID
> August 2023 Conference	33HR

And select KSU Travel Report Details.

Show Expenses  Show Itemizations

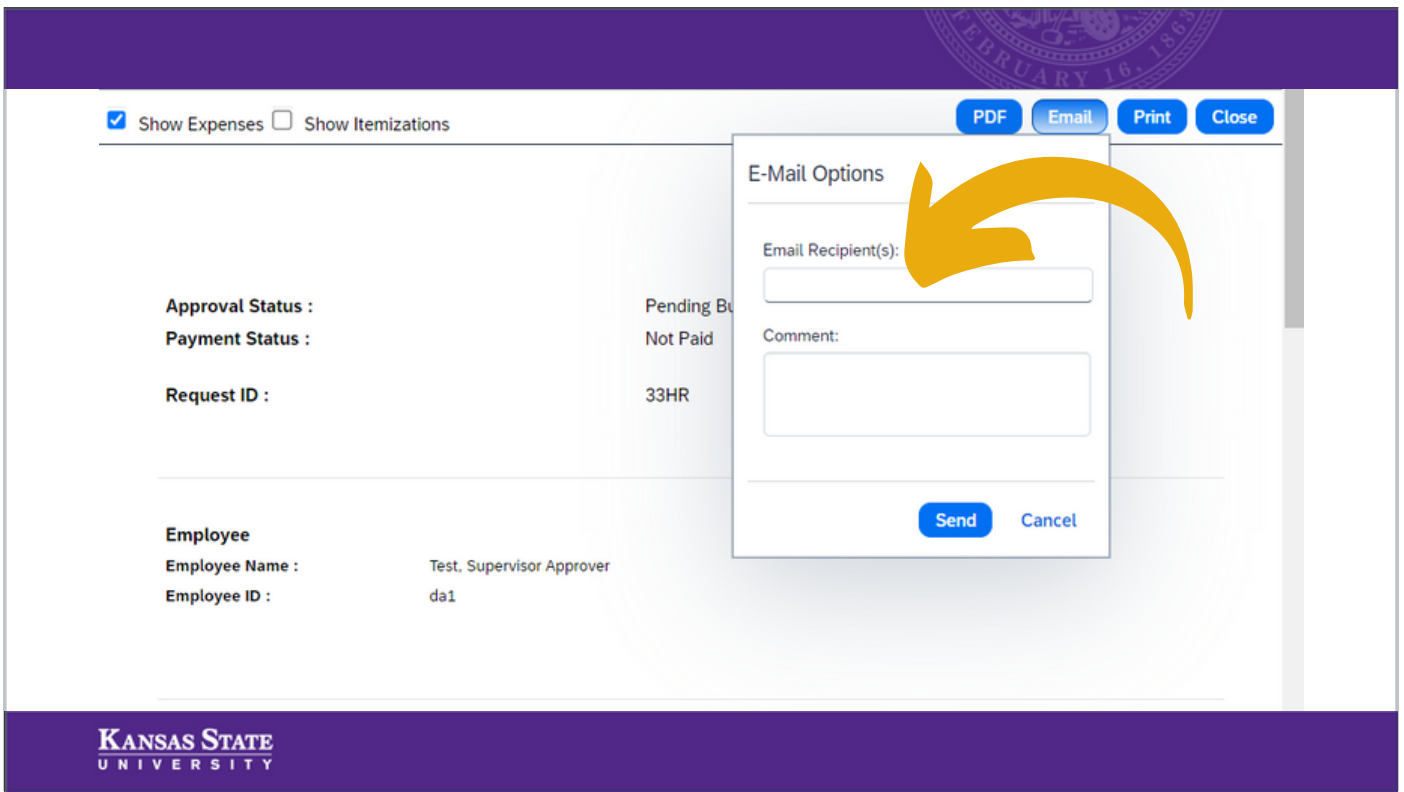
PDF Email Print Close

Approval Status : Pending Business Liaison Approval  
Payment Status : Not Paid  
Request ID : 33HR

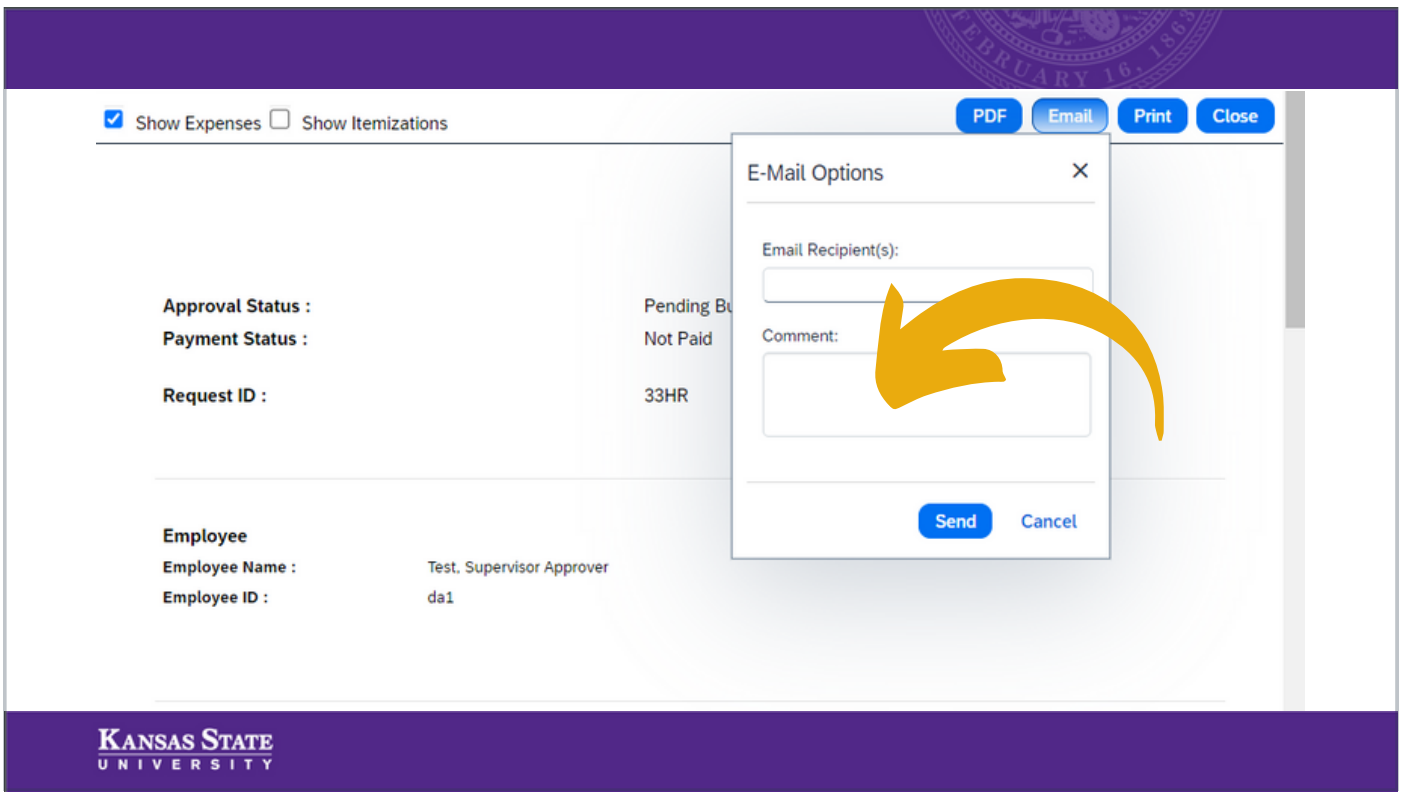
Employee  
Employee Name : Test, Supervisor Approver  
Employee ID : da1

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The report window will open. Click on the Email button.



On the Email Options window, enter the employee's email address,



And add a comment that explains what documentation the employee needs to add to the report.

Approval Status : Pending Bu  
Payment Status : Not Paid  
Request ID : 33HR

Employee  
Employee Name : Test, Supervisor Approver  
Employee ID : da1

E-Mail Options

Email Recipient(s):  
Comment:

Send Cancel

KANSAS STATE UNIVERSITY

Then click send.



## Testing 0108

[Test, Traveler3]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

[Summary](#) [Details](#) [Receipts](#) [Print / Email](#)

### Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...
01/08/2024	Computer Acce...	Computer Peo...	

Expense [Receipt Image](#)

Expense Type Computer Accessories & Supp	Transaction Date 01/08/2024	Additional Comments	Additional Information
Enter Vendor Name Computer People	City of Purchase	Payment Type Out of Pocket	Amount 276.21 USD
Reviewed No	Approved Amount 276.21	Comment	

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Once you have confirmed that all expenses are allocated appropriately and all financial data and documentation are accurate and complete, click **Approve** at the top right of the screen to move the report forward to the next step in the workflow.



And that brings us to the end. Do we have any questions?

- **concur.k-state.edu**

- Training
  - videos
  - printable pdfs
- FAQs
- Survey link



- **Concur Collaboration Zoom sessions:**

- February 27-March 31: 8am-noon; 1-5pm (hours may be reduced based on need)
- <https://ksu.zoom.us/j/94653408664> Meeting ID: 946 5340 8664

- **Anthony Travel**

- Training March 26-28
- On-site agent April 1

Thank you so much for joining us today. Again, I want to remind you of the resources available to you as you're learning to navigate the new Concur processes. We sincerely appreciate your time today.