

# Concur Expense Management: **Funding & Reviewing Travel Requests**

Welcome to our training on funding and reviewing travel requests in Concur.

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

This training is specific to business liaisons who will review requests for travelers. For details on creating or approving travel requests, please refer to our training videos on those topics.

Request Pending Your Approval



Kansas State University Concur <AutoNotificat  
To: Christa Beemer

Reply

Reply All



Forward



Mon 11/13/2023 8:41 AM

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Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

**This email originated from outside of K-State.**



 

**Kansas State University Concur**

**You have a request pending your approval.**

---

Request From	Concur Test
Request ID	33JJ
Request Name	Dawn Test BL is Submitter2
Total Posted Amount	500.00 USD



 

Once a traveler submits a request and the request is approved by the traveler's supervisor, you as the traveler's business liaison will receive an email that the request is ready for your review.

Request Pending Your Approval



Kansas State University Concur <AutoNotificat  
To: Christa Beemer

[Reply](#) [Reply All](#) [Forward](#)  

Mon 11/13/2023 8:41 AM

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

### Kansas State University Concur

**You have a request pending your approval.**

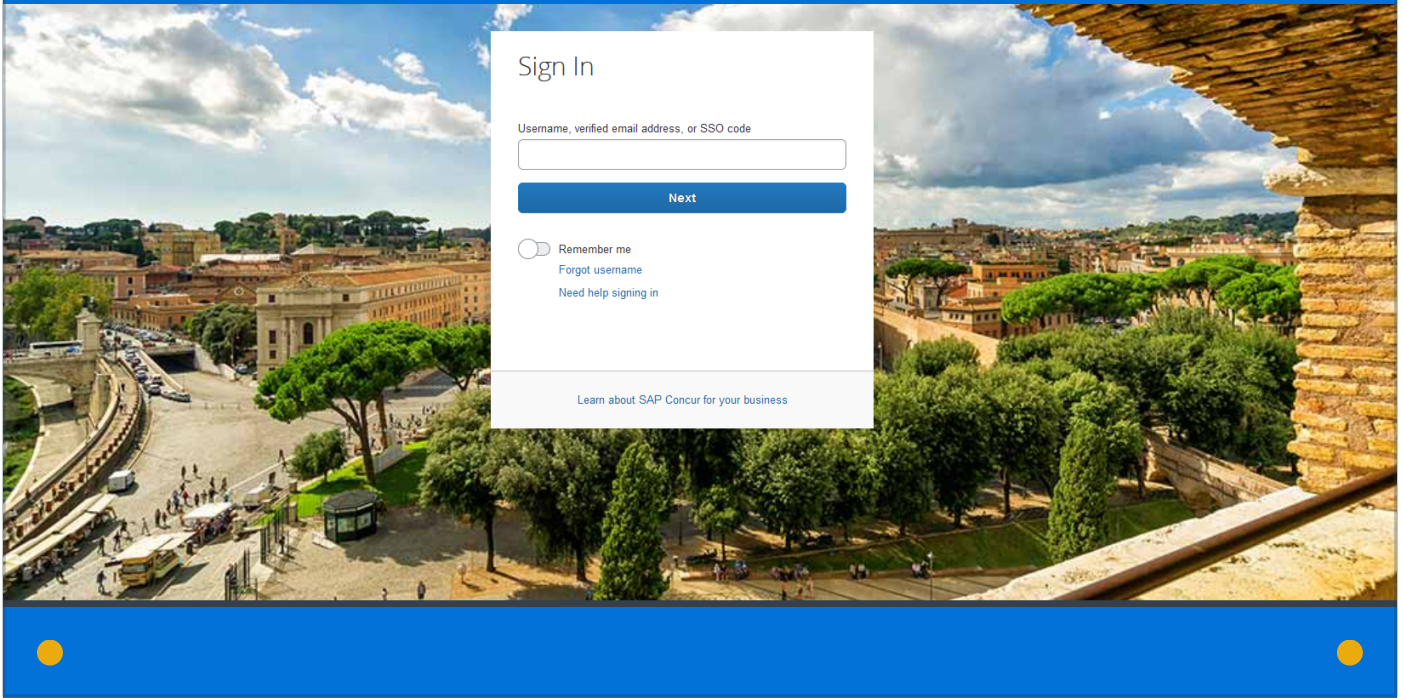
Request From	Concur Test
Request ID	33JJ
Request Name	Dawn Test BL is Submitter2
Total Posted Amount	500.00 USD

**Link To Approve Request**

<http://www.concursolutions.com>



That email will contain a link to access the request in question. Click on this link.



The first step in accessing the request is to log in to Concur.

## Supvsr Blank Submtr Not BL \$485.00

[More Actions](#) ▼ [Approve](#)

 Traveler3 Test | Pending Business Liaison Approval | Request ID: 33NH


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

### EXPECTED EXPENSES

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

<input type="checkbox"/>	Expense type <sup>↓↑</sup>	Details <sup>↓↑</sup>	Date <sup>↓↑</sup>	Amount <sup>↓↑</sup>	Requested <sup>↓↑</sup>
<input type="checkbox"/>	Travel-Related Training & Conference Registration	Iola, Kansas	12/11/2023	\$450.00	\$450.00
<input type="checkbox"/>	Professional Memberships/Dues		12/11/2023	\$35.00	\$35.00
					\$485.00

The applicable request will then open to a screen that allows you to view details of the request.

 Alerts: 2



At the top of this screen, look for any alerts or warnings. These need to be addressed as part of your review process.



Important!



Allocate

Expenses: 1 | \$3.00

Percent

Amount  
\$3.00

Default Allocation

Code  
90001-NKSUDFAULT-10-NOAWRD-2080



Make sure as part of your review to check the allocation. If you see any expense with the default funding string, change the allocation to the funding string appropriate to the department and expense.



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

## Travel Req 0108 \$180.30

More Actions ▾

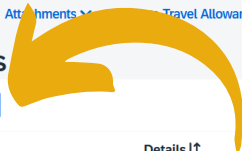
Submit Request

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

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

### EXPECTED EXPENSES

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



<input checked="" type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input checked="" type="checkbox"/>	Parking	Wichita, Kansas	01/08/2024	\$10.00	\$10.00
<input checked="" type="checkbox"/>	Personal Car Mileage	Wichita, Kansas : Manhattan, KS, USA - Wichita, KS, USA	01/08/2024	\$170.30	\$170.30 <small>Allocated</small>
					\$180.30

To allocate an expense—assigning a funding string to it—select the expense on the Expected Expenses screen and then click on the Allocate button.

# Travel Req 0108 \$180.30

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

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

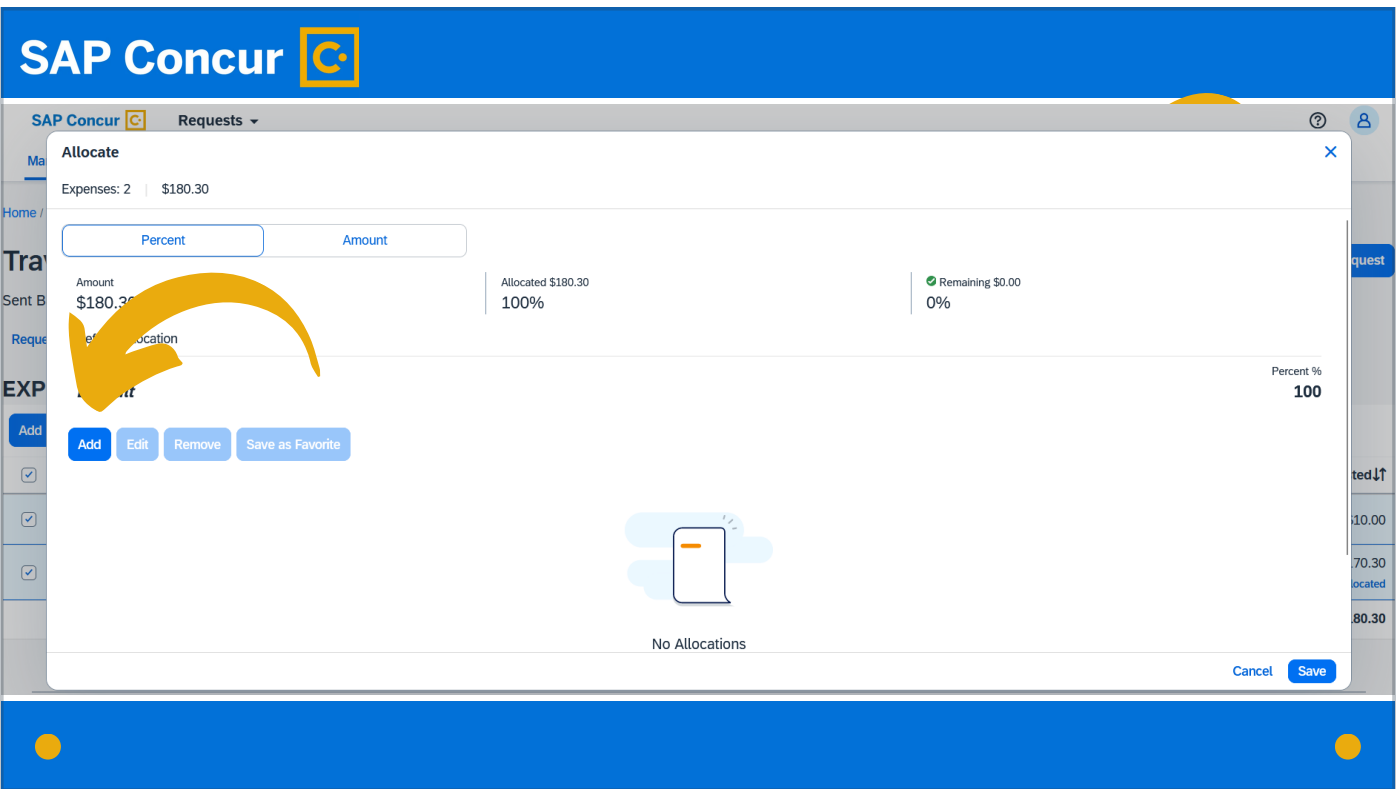


## EXPECTED EXPENSES

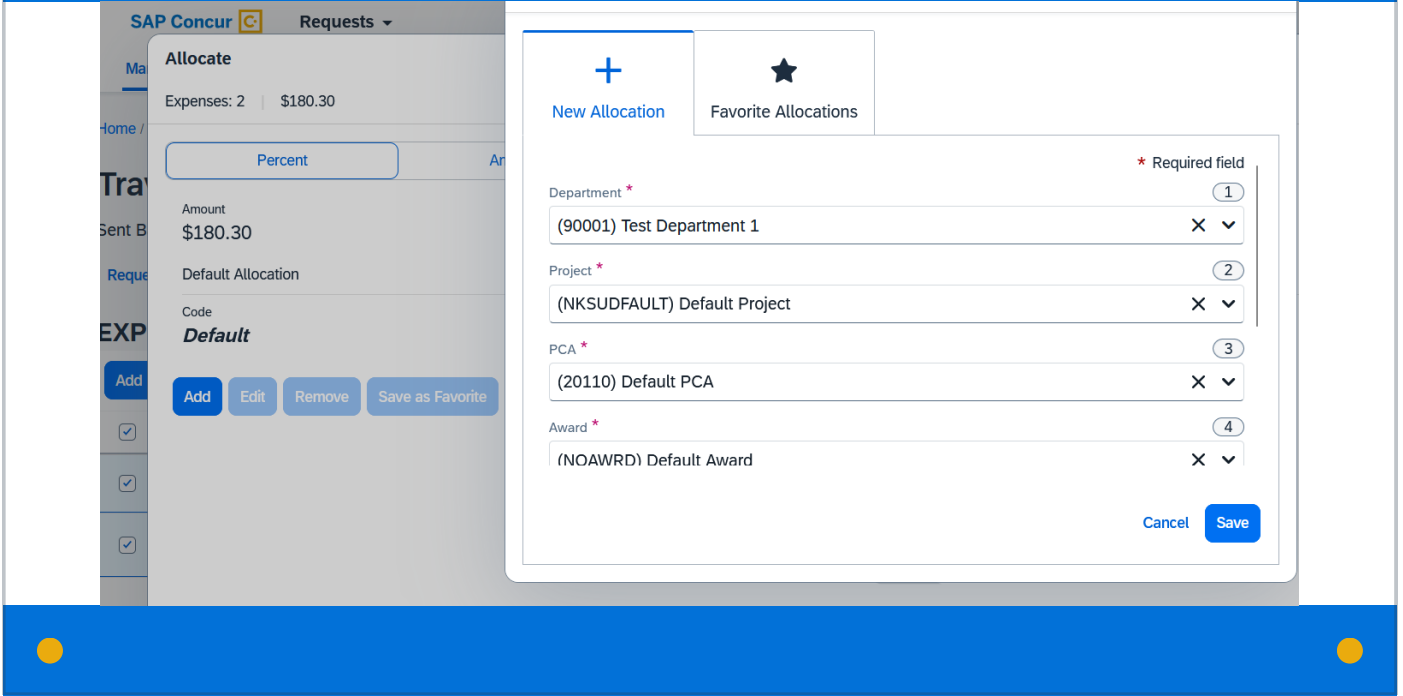
[Add](#) [Delete](#) [Allocate](#)

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

Training Tip! If there are multiple expenses on a request and all expenses are allocated under the same funding string, the allocation can be assigned to all expenses at once by checking the top checkbox on the Expected Expenses screen and then assigning the funding string.



In the Allocation window that populates, click the Add button.



Fill in each field with the applicable funding information.



You should also ensure that any documentation associated with the travel is attached, as defined by departmental procedures regarding PPM 6410. This may include such documents as the International Travel Registration, conference agendas or itineraries, or any other documents the department may find helpful in showing the business purpose of the travel.

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 EXPENSES

[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

If documentation is missing, either the business liaison or the traveler can attach it. Documentation can be attached to a request at any time by clicking on the Attachments dropdown menu.





It is not necessary to send back the request to the traveler for the attachment to be added.

Send Back to Employee

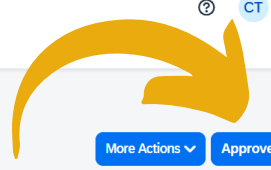


In fact, it is better if the request is not sent back, as—again—this will cause the entire workflow to start over.

## Travel Req w Warning 0108 \$180.30

Traveler3 Test | Pending Business Liaison Approval | Request ID: 33QN

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



[More Actions](#) ▾ [Approve](#)

### EXPECTED EXPENSES

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

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Parking	Wichita, Kansas	01/08/2024	\$10.00	\$10.00
<input type="checkbox"/>	Personal Car Mileage	Wichita, Kansas : Manhattan, KS, USA - Wichita, KS, USA	01/08/2024	\$170.30	\$170.30 <small>Allocated</small>
					\$180.30

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 request forward to the next step in the workflow.