

Create a Travel Request

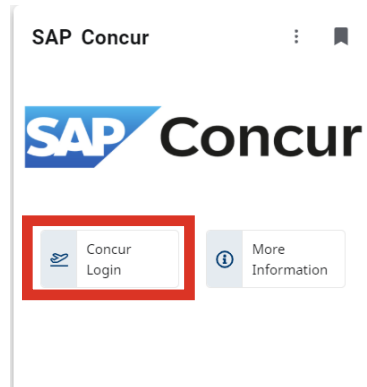
(previously known as a Travel Authorization)

Table of Contents

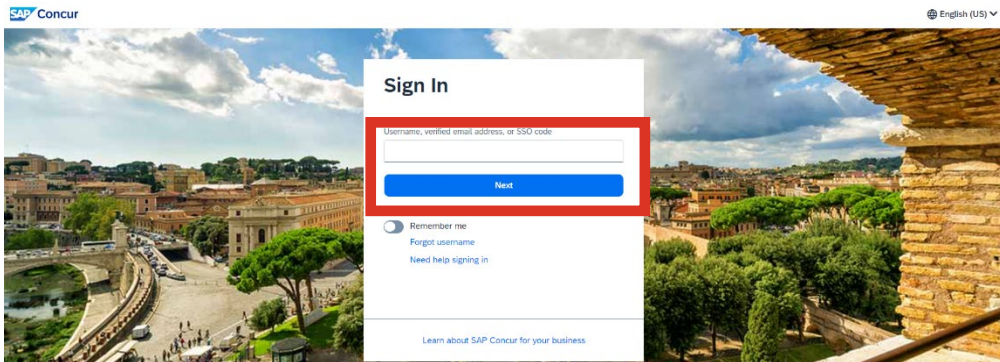
Log in to Concur.....	2
Work as a delegate.....	3
Steps required to create a Travel Request.....	4
Create the Header Record.....	5
Add Expected Expenses	7
Hotel Expense Types	8
Personal Car Mileage	9
Complete Travel Allowance (meal & incidental per diem expenses).....	10
Allocate Expenses – split funding.....	13
Save Favorite Allocations	15
Use Favorite Allocations.....	16
Add Attachments	18
Submit the Request	19

Log in to Concur

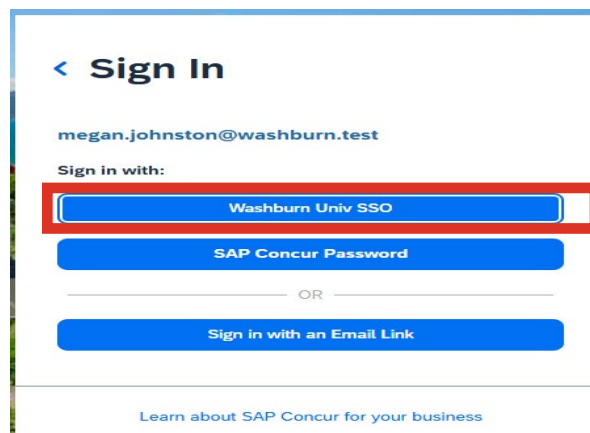
- Go to MyWashburn and find the SAP Concur card and select “Concur Login”.



- Or, go to concurolutions.com.
 - Enter your Washburn University Email and click “Next”.



- Click “Washburn Univ SSO”.
- Enter your Washburn University Single Sign On credentials.



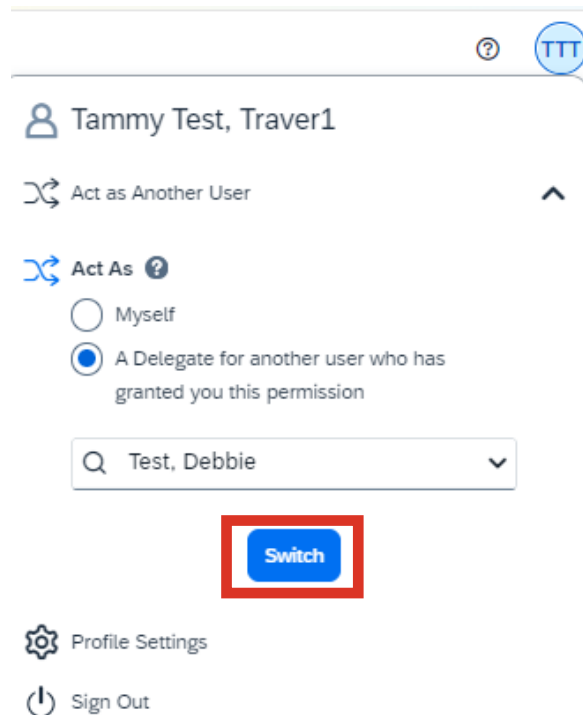
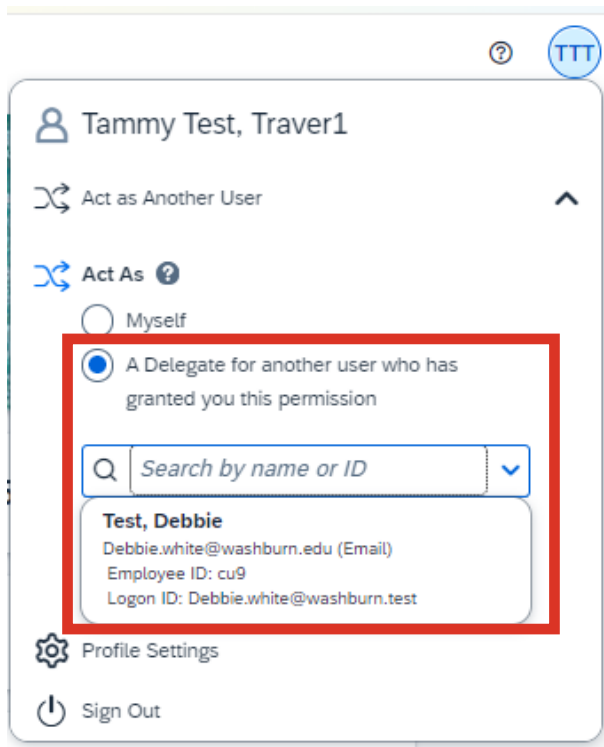
Work as a delegate

If a delegate prepares a Request for someone else, they must do so in the traveler’s Concur account by following these steps. To log into the delegator’s Concur account:

1. Click on the employee profile icon in the upper right corner.
2. Select “Act as another user”.



3. Click the circle next to “A Delegate for another user who has granted you this permission”.
4. Enter the name of the Pcard holder in the search bar.
 - a. If the individual’s name does not appear, that person has not designated you as a delegate.
 - i. Contact the individual to set you up as a delegate in Concur.
 1. Please refer to the document on the Washburn University Accounting website titled “Concur Creating a Delegate”.
5. Click “Switch”.

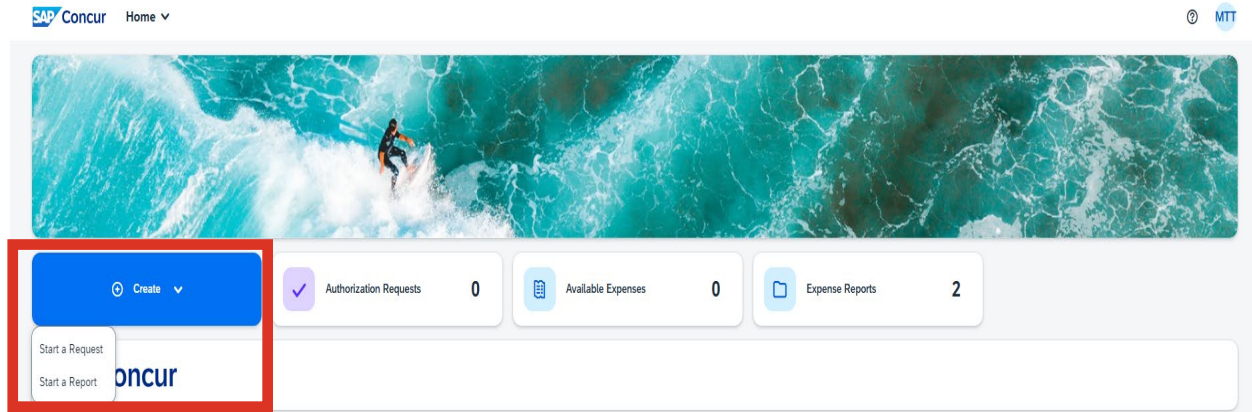


Steps required to create a Travel Request

1. Create the header record using the FOAPAL being used to pay most, if not all, expenses related to the trip.
 - a. Create Travel Allowance (meal and incidental per diem), if applicable.
2. Add all estimated expenses related to the trip.
3. Allocate Expenses (split funding).
 - a. Use if any part of the trip will be paid from a FOAPAL other than what is on the header record.
4. Attach documents.
 - a. Conference Agenda, if applicable.
 - i. Must show the schedule and any meals that were offered as well as the conference hotel rate.
 - b. If group travel, attach a roster.
5. Submit the Request.

Create the Header Record

From the Concur home page, click on the blue “Create” drop down list and select “Start a Request”.



Complete all required fields, with a red asterisk (*):

- Trip Name
 - Enter a short name for the trip.
 - Used to identify this trip from other trips.
- Trip Start Date
- Trip End Date
- Destination City
- Traveler Type
 - Staff, Faculty, Student, Administrator
- Trip Type
 - Domestic – Within the US
 - International – Outside of the US
 - In Town – Local
- Trip Purpose
 - If “other”, add reason in the addition information field.
- Personal Travel
 - Answer “No” if all travel dates are business related.
 - Answer “Yes” if the travel dates include personal travel days.
 - If yes, complete the start and end date for the personal travel days.
- Chart, Fund, Org, Program
 - This is the FOAPAL from where the trip will be paid.
 - If funding is coming from more than one FOAPAL, an additional FOAPAL is entered during step 3, allocation.
 - This information does not auto fill from the user’s Concur profile in Request, it only auto fills on an Expense Report.
 - The FOAPAL account code (now referred to as expense type) is selected later in this process.
 - Activity
 - Not required, enter only if needed.
 - Location
 - Refers to the WU campus location and is never used for travel.

- Additional Information
 - Add any additional information about this trip that would be helpful for individuals who review or approve the Request.
 - If “other” was selected as the Trip Purpose, enter the purpose of the trip in this field.
- Comments
 - Use this field to provide additional information that will answer any questions an auditor may have when reviewing the report.
- Click on “Create Request”.

Create New Request ✕

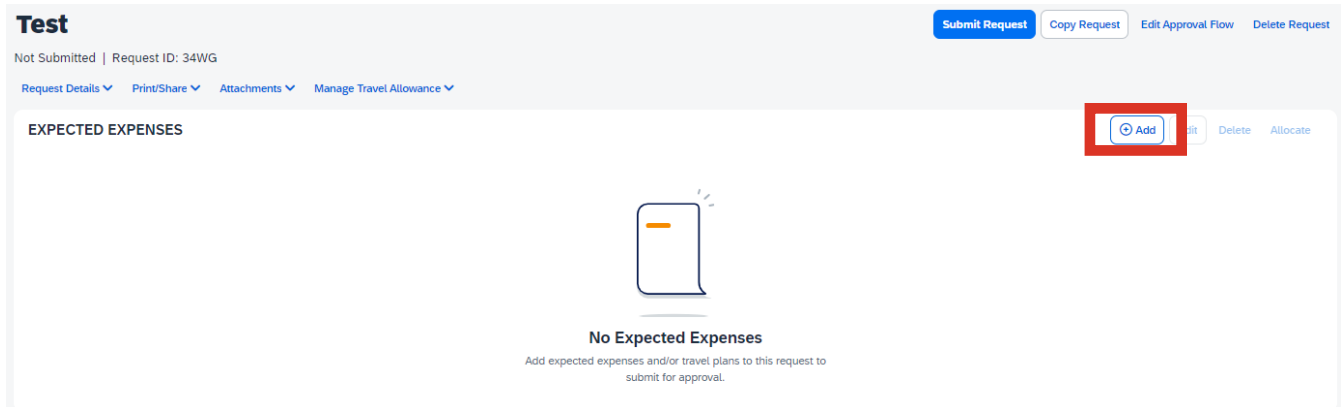
*** Required field**

Trip Name * <input type="text" value="Test"/>	Trip Start Date * <input type="text" value="MM/DD/YYYY"/>	Trip End Date * <input type="text" value="MM/DD/YYYY"/>
Destination City * <input type="text"/>	Destination Country <input type="text" value="Search by Country/Region"/>	
Traveler Type * <input type="text" value="Staff"/>	Trip Type * <input type="text" value="None Selected"/>	
Trip Purpose * <input type="text" value="None Selected"/>	Sport <input type="text" value="None Selected"/>	
Will this trip contain Personal Travel? * <input type="text" value="None Selected"/>	Personal Travel Start Dates ? <input type="text" value="MM/DD/YYYY"/>	Personal Travel End Date ? <input type="text" value="MM/DD/YYYY"/>
Chart * 1 <input type="text"/>	Fund * <input type="text"/>	ORG 2 <input type="text"/>
Program * <input type="text"/>	Activity <input type="text"/>	Location <input type="text"/>
Additional Information 0/500 <input type="text"/>		
Comment To/From Approvers/Processors 0/500 <input type="text"/>		

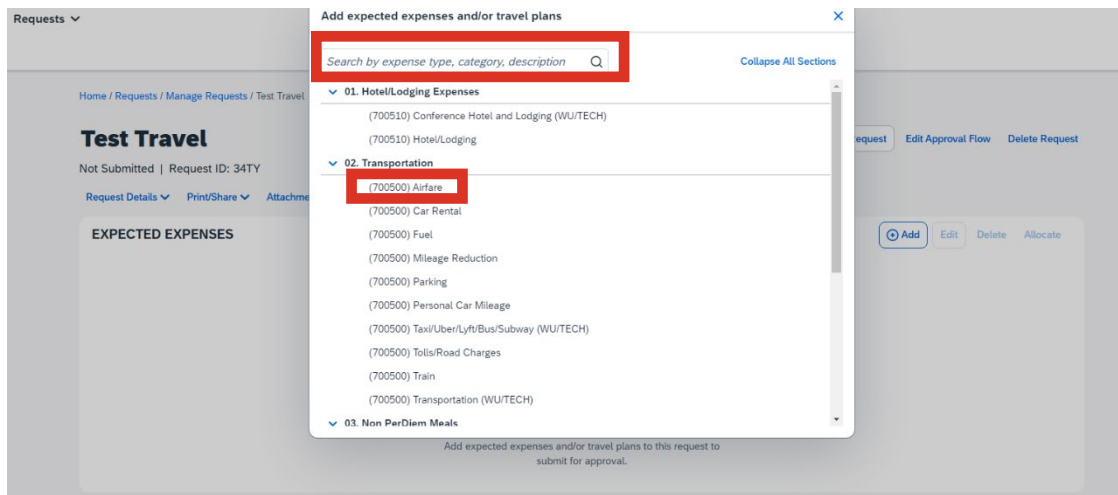
Cancel

Add Expected Expenses

- Click “Add”.



- Select the appropriate Expense Type.
 - A search field is provided at the top of the screen.
 - The 6-digit number before the expense type is the FOAPAL account code.



- Complete all required fields, with a red asterisk (*):
 - Trip Start and End Date
 - These fields will prepopulate from the header record.
 - Transaction Amount
 - Enter the total estimated cost for the expense type.
 - Currency
 - Comment
 - Use this field to provide additional information that will answer any questions an auditor may have when reviewing the report.
 - Click “Save”.

Home / Requests / Manage Requests / Test Travel / New Expense: (700510) Conference Hotel and Lodging (WU/TECH)

New Expense:(700510) Conference Hotel and Lodging (WU/TECH)

[Allocate](#)

Request/Trip Start date * 12/16/2024

Request/Trip End Date * 12/20/2024

Transaction Amount * 500.00

Currency * US, Dollar (USD)

Comment 26/2000
Hotel for Test Conference.

[Save](#) [Cancel](#)

[Save](#) [Cancel](#)

* Required field

- Repeat Steps until all estimated expenses have been added to the Request.
- Do not make any reservations until the Request is fully approved.
- Two expense types move from this Request to the Expense Report after travel occurs.
 - Personal car mileage and Travel Allowance
- All other expense types are manually entered when preparing the Report, after travel.

Hotel Expense Types

- Use one of these hotel expense types on the Travel Request.
 - (700510) Hotel/Lodging
 - Use to report the GSA lodging rate.
 - (700510) Conference Hotel and Lodging (WU/TECH)
 - Use when reporting a conference hotel rate.

Personal Car Mileage

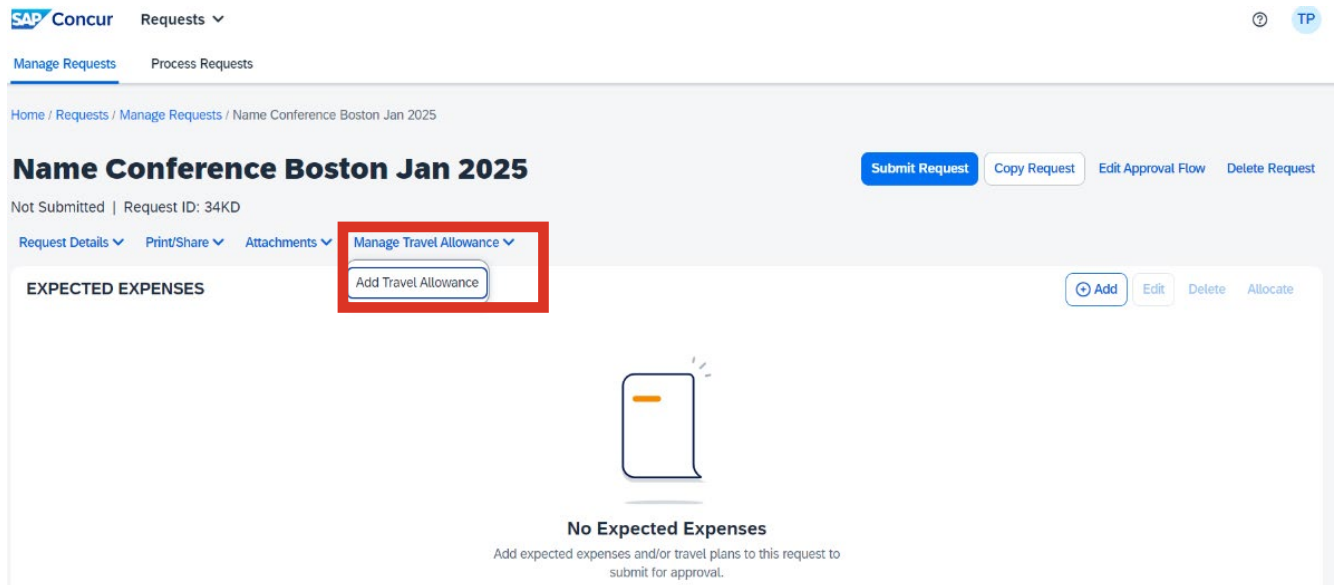
- Select the “Personal Car Mileage” expense type.
- Click on “Mileage Calculator” in the upper left corner.
 - The “From Location” and “To Location” fields are filled in from entering information in the mileage calculator.

- Enter the address for the beginning and ending locations as waypoints A and B.
 - If traveling round trip, click on “Make Round Trip”.
 - If traveling to multiple destinations on the same day, add multiple waypoints by filling in additional addresses in additional waypoint fields.
- Click “Add Mileage to Expense”.

- Enter the Transaction Date.
 - In the lower right corner, above the “comments” field, the IRS mileage reimbursement rate for the date entered is shown.
- Add comments about the mileage, if an explanation will be helpful for Reviewers, Approvers, or Auditors.
- Click on “Save Expense”.

Complete Travel Allowance (meal & incidental per diem expenses)

- GSA = General Services Administration
 - The federal agency who determines food/incidental/lodging rates.
 - Based on date and location.
- Click on “Manage Travel Allowance”.
- Select “Add Travel Allowance”.
 - After the Travel Allowance has been added, it can also be edited by selecting “Edit Travel Allowance” under “Manage Travel Allowance”.
 - The Travel Allowance can be edited until the Request has been submitted.
 - The Travel Allowance can be revised in the Expense Report, after traveling.



- On the first Travel Allowance screen, enter the itinerary.
- Complete all required fields, with a red asterisk (*):
 - Itinerary Name
 - This field auto fills from the Header Record.
 - Start Location/Arrival Location/End Location
 - Only add locations where you sleep.
 - Places traveled throughout the day are not needed.
 - Example: KC Airport, connection airports
 - Start and end dates
 - These fields auto fill from the Header Record.
 - Start and end times
 - Enter the time departed from, and returned to, the official workstation.
- Click “NEXT”.

Travel Allowance

Itinerary

Itinerary Name * * Required

Name Conference Boston Jan 2025 Detailed Itinerary Without overnight

Start Location * Start Date * Start Time *

+ Add Destination

Arrival Location *

+ Add Destination

End Location * End Date * End Time *

[Delete Itinerary](#) Next: Adjust your travel allowance [Next](#) [Cancel](#)

- On the second Travel Allowance screen, declare any free meals that will be received, reducing the daily allowance.
- Check the box for a meal if:
 - The meal will be paid for by another individual.
 - The meal is offered at a conference, as part of the registration fee.
 - Continental breakfast or hors d'oeuvres don't count as a meal.
- The column on the far-right side, "Reimbursement Amount", is the amount calculated for meal and incidentals for each day.
 - First travel day = 50% of the full daily per diem
 - Last travel day = 75% of the full daily per diem
 - Full days in travel status = 100% of the full daily per diem
 - All daily totals are reduced for meal boxes checked each day.
- The 2nd column from the right, "Allowance Limit", is the GSA rate for lodging.
 - The lodging expense does not automatically add to the report.
 - The lodging expense needs to be manually added as an expense.
- Click on "Finish".

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: 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Mon, 12/02/2024 Orlando, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$140.00	\$18.00
Tue, 12/03/2024 Orlando, UNITED STATES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$140.00	\$38.00
Wed, 12/04/2024 Orlando, UNITED STATES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$140.00	\$38.00
Thu, 12/05/2024 Orlando, UNITED STATES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$140.00	\$38.00
Fri, 12/06/2024 Orlando, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$60.00
Total:						\$560.00	\$192.00

[Back](#) [Finish](#) [Cancel](#)

The meal and incidental amount show as “Travel Allowance” in the list of Expected Expenses on the report.

Name Conference Boston Jan 2025 \$279.50 Submit Request Copy Request Edit Approval Flow Delete Request

Not Submitted | Request ID: 34KD

[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"/>	Travel Allowances	Nashville, Tennessee	01/12/2025 - 01/15/2025	\$279.50	\$279.50

\$279.50

If a supervisor approves it, meal and incidental per diem can be requested for same day travel, if the traveler is gone 5 hours or more.

If requesting meal and incidental per diem for more than one same day trip on the same report, add an additional Travel Allowance for each day.

Allocate Expenses – split funding

- Allocate is used in Concur when expenses are being paid from multiple FOAPALs.
- If Allocate isn't used, all estimated expenses will be paid from the FOAPAL on the report header.
- Allocate can be used on one expense line, or multiple expense lines.
 - If all expense lines need to be allocated to a different FOAPAL, and all expenses are being paid from the same FOAPAL, simply change the FOAPAL on the header record, rather than allocating every line.
- Check the box(es) to left of the expected expense line(s) that will be paid from a different source(s).
- Click on “Allocate” in the upper right corner of the Expected Expense section.

Name Conference Boston Jan 2025 \$779.50 Submit Request Copy Request Edit Approval Flow Delete Request

Not Submitted | Request ID: 34KD

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

EXPECTED EXPENSES Add Edit Delete Allocate

Alert	Expense type	Details	Date	Amount	Requested
<input checked="" type="checkbox"/>	(700500) Airfare		01/12/2025	\$500.00	\$500.00
<input type="checkbox"/>	Travel Allowances	Nashville, Tennessee	01/12/2025 - 01/15/2025	\$279.50	\$279.50
					\$779.50

- The Allocate screen shows 100% of the estimated amount charged to the FOAPAL on the header record.
- The allocation can be done by percent or amount.
 - Select the appropriate option at the top of the Allocate screen.
- Select “Add”.

Allocate ×


Expenses: 1 | \$500.00

Amount: \$500.00 | Allocated 100%: \$500.00 | Remaining 0%: \$0.00

Default Allocation

Code: **W-4567-410000-10000** | Amount USD: **\$500.00**

Allocations (0) Add Remove Save as Favorite



No Allocations

This expense is assigned to your default allocation shown above.

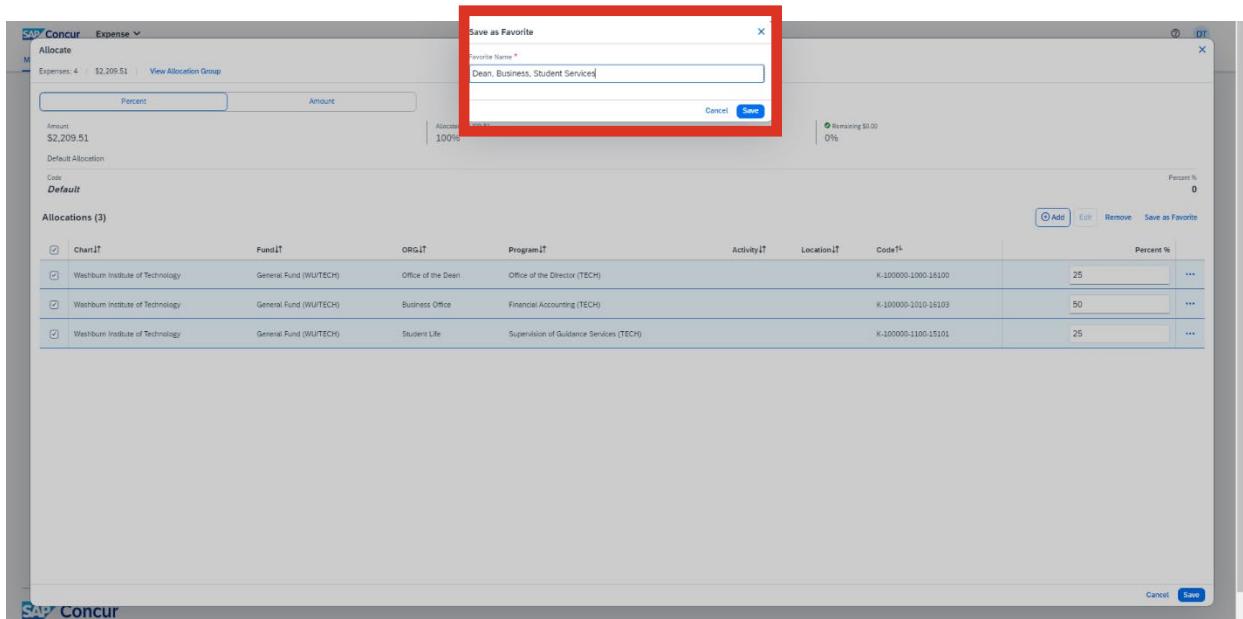
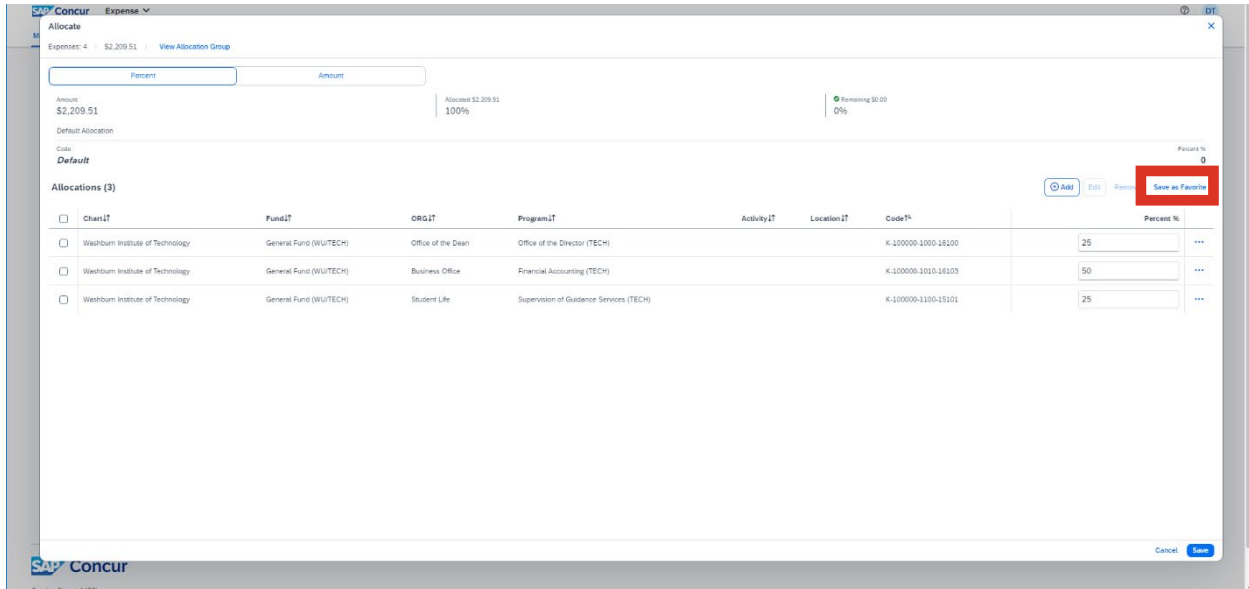
Cancel Save

- The FOAPAL from the header record prepopulates on the Add Allocation screen.
- If the FOAPAL from the header record is partially paying the estimated expense(s) being allocated, click “Save” to add that FOAPAL to the allocation.
 - That FOAPAL shows in the lower part of the Allocate screen.
 - If no other FOAPAL is added, the entire expense that was selected will still be paid from the FOAPAL on the header record.

- To add a 2nd FOAPAL that will be paying for part of the estimated expense, select “Add”.
- Change the appropriate FOAPAL component(s).
- Click on “Save”.
- If the FOAPAL on the header record is not part of the allocation, change the FOAPAL components before clicking save for the first time.
- Continue to “Add” FOAPALS until all FOAPALS paying a portion of the estimated expense(s) have been added.
- Adjust the amount for each FOAPAL, if needed.
- Click “Save” on the Allocate screen to save the current allocation for the estimated expenses previously selected.
- If this is an allocation that will likely be used again in the future, save it as a Favorite Allocation.

Save Favorite Allocations

- Allocation Favorites can be one funding line or multiple funding lines.
- Click “Save as Favorite” in the middle of the Allocate window, on the right side of the screen.
- Enter a name for the favorite allocation that can be selected when allocating future expenses.
- Click “Save”.



Use Favorite Allocations

- Click “Favorite Allocations” at the top of the Add Allocation window.

- Select the appropriate allocation by clicking the circle to the left of the allocation name.
- Click “Replace Allocations”.

- Click “Replace Allocations” again in the next warning message.

- The estimated expense(s) selected will be paid from the favorite allocation that was selected.
- If other estimated expenses in the Request need to be allocated differently, repeat the steps above until all estimated expenses have been properly allocated.

- “Allocated” appears in blue font under the expense amount on all expense lines that have been allocated.
 - Click on it to see the details of the allocation.
 - This detail defers to percentages, even if amount was selected on the Allocate screen.

Name Conference Boston Jan 2025 \$779.50
 Not Submitted | Request ID: 34KD

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

EXPECTED EXPENSES

Alert	Expense type	Details	Date	Amount	Status
<input type="checkbox"/>	(700500) Airfare		01/12/2025	\$500.00	Allocated
<input type="checkbox"/>	Travel Allowances	Nashville, Tennessee	01/12/2025 - 01/15/2025	\$279.50	
				\$779.50	

Allocated Pop-up Window:

Total Allocated: \$500.00

Code	Percent
W-4567-100000-10000	50
W-4567-410000-10000	50

View Allocation

- To see the allocation information a different way, click on Request Details and choose Allocation Summary.

Name Conference Boston
 Not Submitted | Request ID: 34KD

Request Details | Print/Share | Attachments | Manage

EXPECTED EXPENSES

Alert	Expense type	Date	Amount	Requested
<input type="checkbox"/>	(700500) Airfare	01/12/2025	\$500.00	\$500.00 Allocated
<input type="checkbox"/>	Travel Allowances	01/12/2025 - 01/15/2025	\$279.50	\$279.50
				\$779.50

Allocation Summary Pop-up Window:

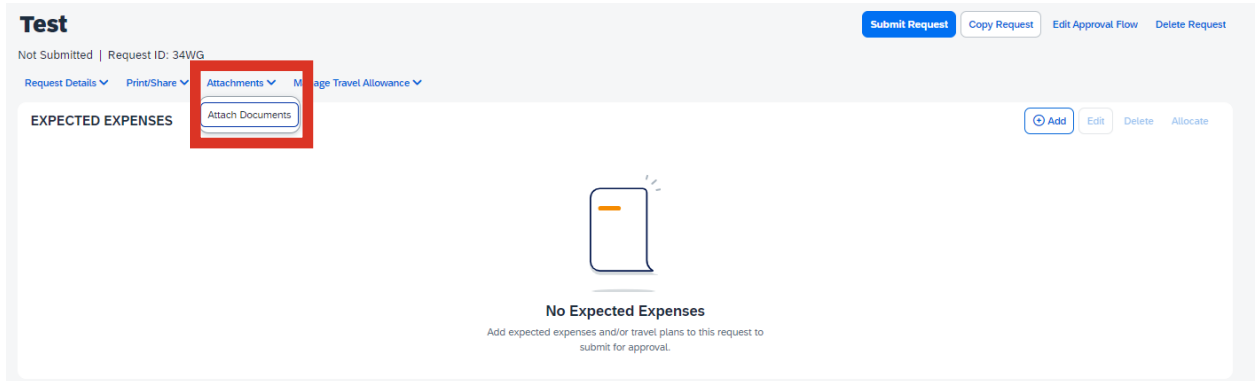
Name Conference Boston Jan 2025 | \$779.50

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

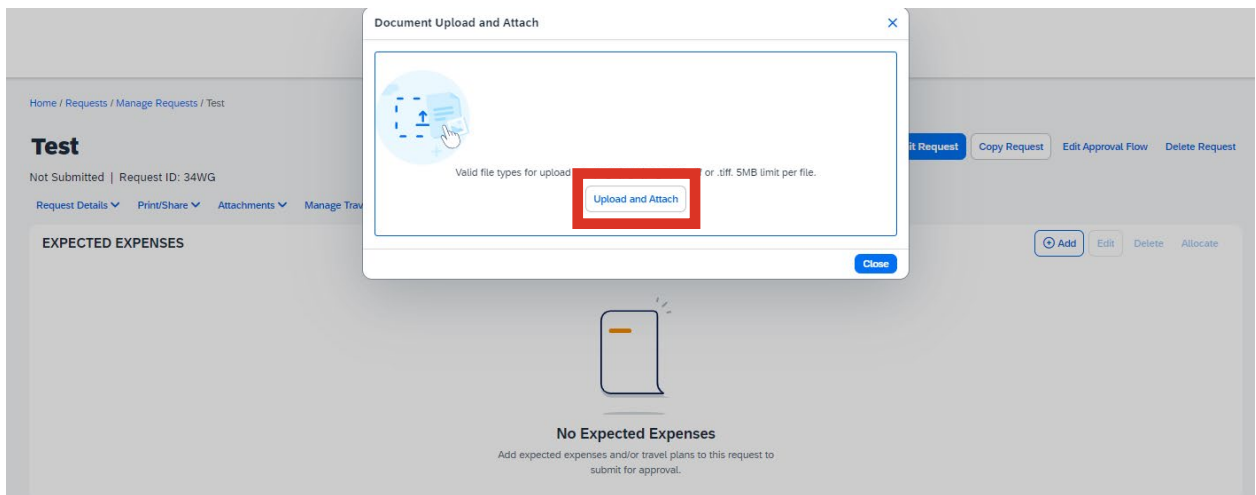
Code	Amount
W-4567-410000-10000 Washburn University - B & K Viets Teach Excell Fac Dev (WU) - Finance Office - Operating Revenues (WU/TECH)	\$529.50
W-4567-100000-10000 Washburn University - B & K Viets Teach Excell Fac Dev (WU) - President's Office - Operating Revenues (WU/TECH)	\$250.00

Add Attachments

- Use this area of the Request to attach Conference Agendas and/or Group Rosters.
 - Conference Agendas must show meals provided and conference hotel rate.
- With the Request open, click “Attachments” above the list of Expected Expenses.
- Select “Attach Documents”.



- Click “Upload and Attach”.



- Browse for the document and select “Open”.

Submit the Request

- Review all alerts on the request.
 - Alerts that have a **RED X** must be resolved prior to submitting the request.
 - Alerts that have an **ORANGE TRIANGLE** are information only and do not prevent the request from being submitted.
- Once all expected expenses have been added to the request, allocated if needed, and alerts have been resolved, click on “Submit Request”.
 - A Delegate cannot submit a Request for someone else.
 - If preparing as a delegate, click “Ready for Review”.
 - The traveler must then log into their Concur account to review the Request and click “Submit Report”.
- Click on “Accept & Continue” after reading the submit agreement.

Alerts for the report are shown here. Review the alerts by clicking on “view”.

Alerts: 3

EXPENSE | (700500) Parking | 12/16/2024 | \$50.00

⚠ Reimbursement for valet parking will require documentation from the hotel of the parking options available. Reimbursement shall be limited to the amount of the fee for self-serve parking. If self-serve parking is available, this is the only rate which will be reimbursed. To be reimbursed for valet parking, a statement from the hotel showing there are no other types of parking options will be included with the expense report. [View](#)

⚠ Travelers are encouraged to use the least expensive convenient parking alternative available. At Kansas City International Airport (KCI), long term economy parking on the airport premises for grant funded trips. For non-grant funded trips, Travelers may use the KCI Park Air Express Outdoor parking. Reimbursement for other KCI parking options will be limited to those listed. [View](#)

EXPENSE | (700500) Airfare | 12/16/2024 | \$350.00

⚠ FYI: The University reimburses for the lowest-priced coach class airfare available consistent with flight availability and Traveler convenience. The cost to upgrade to business or first class shall be borne by the Traveler. Early check in, travel insurance, and seat choices will also be borne by the Traveler unless documentation from the airline is included stating seat choice is required. [View](#)

Test Travel \$1,699.16 [Submit Request](#) [Copy Request](#) [Edit Approval Flow](#) [Delete Request](#)

Not Submitted | Request ID: 34TY

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

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

<input type="checkbox"/>	Alert	Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>			(700600) Conference & Seminar Registration (WU/TECH)		12/16/2024	\$700.00	\$700.00
<input type="checkbox"/>			(700510) Conference Hotel and Lodging (WU/TECH)		12/16/2024	\$500.00	\$500.00
<input type="checkbox"/>			(700900) Personal Car Mileage	1700 SW College Ave, Topeka, KS 66621, USA - Kansas City Int'l Airport (MCI), 1 Kansas City Blvd, Kansas City, MO 64153, USA	12/16/2024	\$99.16	\$99.16
<input type="checkbox"/>	⚠		(700900) Parking		12/16/2024	\$50.00	\$50.00
<input type="checkbox"/>	⚠		(700500) Airfare		12/16/2024	\$350.00	\$350.00

User Electronic Agreement

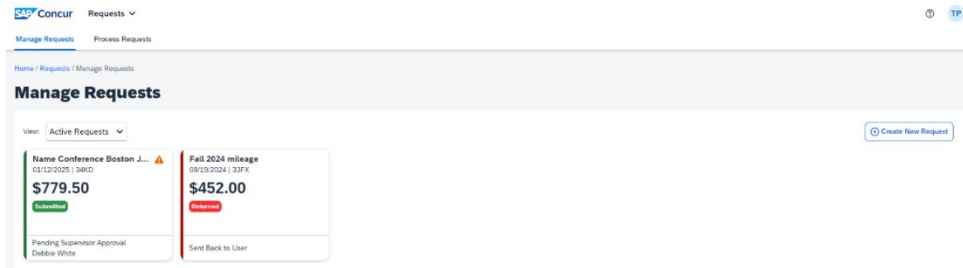
By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the University in full for those expenses.

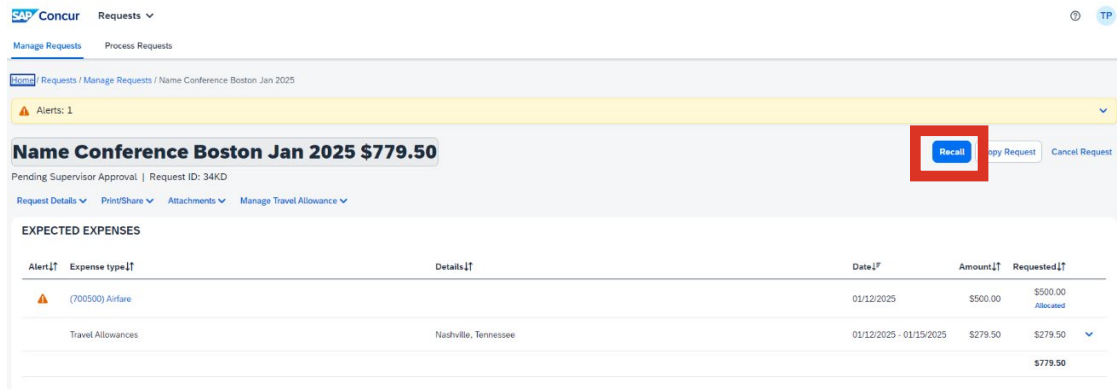
[Cancel](#)

[Accept & Continue](#)

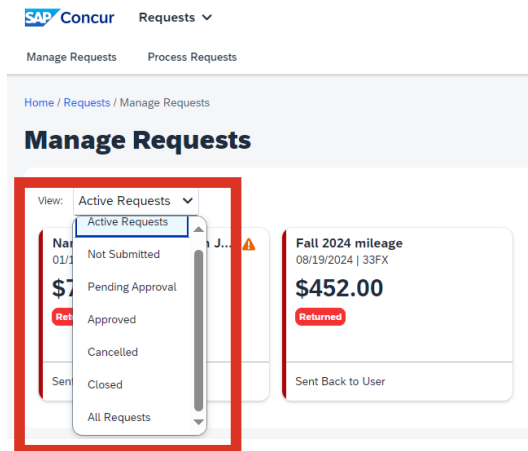
Return to the Request Library to see the status of active requests.



If a revision is needed on a Request that has been submitted, but not fully approved, open the request from the Request Library and click “Recall” in the upper right corner.



Requests remain active for 60 days after the travel end date. After that time, the “view” option will need to be changed to “all requests” to find a request.



Please refer to the document on the Washburn University Accounting website titled “Concur Approval Workflow” to see how the request is routed for approval.

If you have any questions, please contact the designated staff in your unit or contact the Accounting/Finance office

- Call Extension: 2044 or 1859
- Email: accounts-payable@washburn.edu