How to Manage an Employee Request

Michigan State University employees can submit a travel Request in Concur with your requested trip expenses. Follow the Table of Contents below to manage a Travel Request in Concur.

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How to Manage an Employee Request

Create a Request

1. Start at the **Concur Homepage**, click **Create**, then select **Start a Request**.

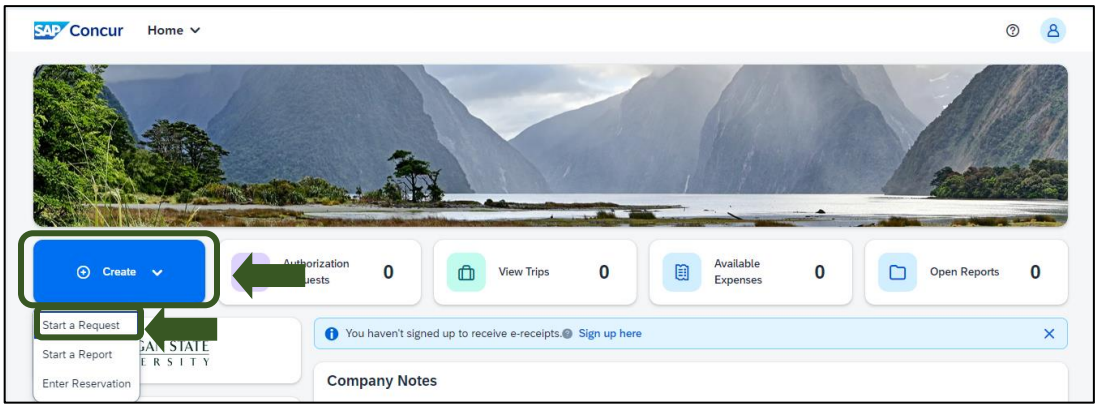

Exhibit 1

2. Enter the necessary information and required fields indicated with a (*). Enter any additional information you would like to share with the Approver in the **Comments** To/From Approvers/Processors field. Select **Create Request** once you are done filling in the required information.

NOTE: Entries in the **Request/Trip Name** field, populate the KFS Accounting String.

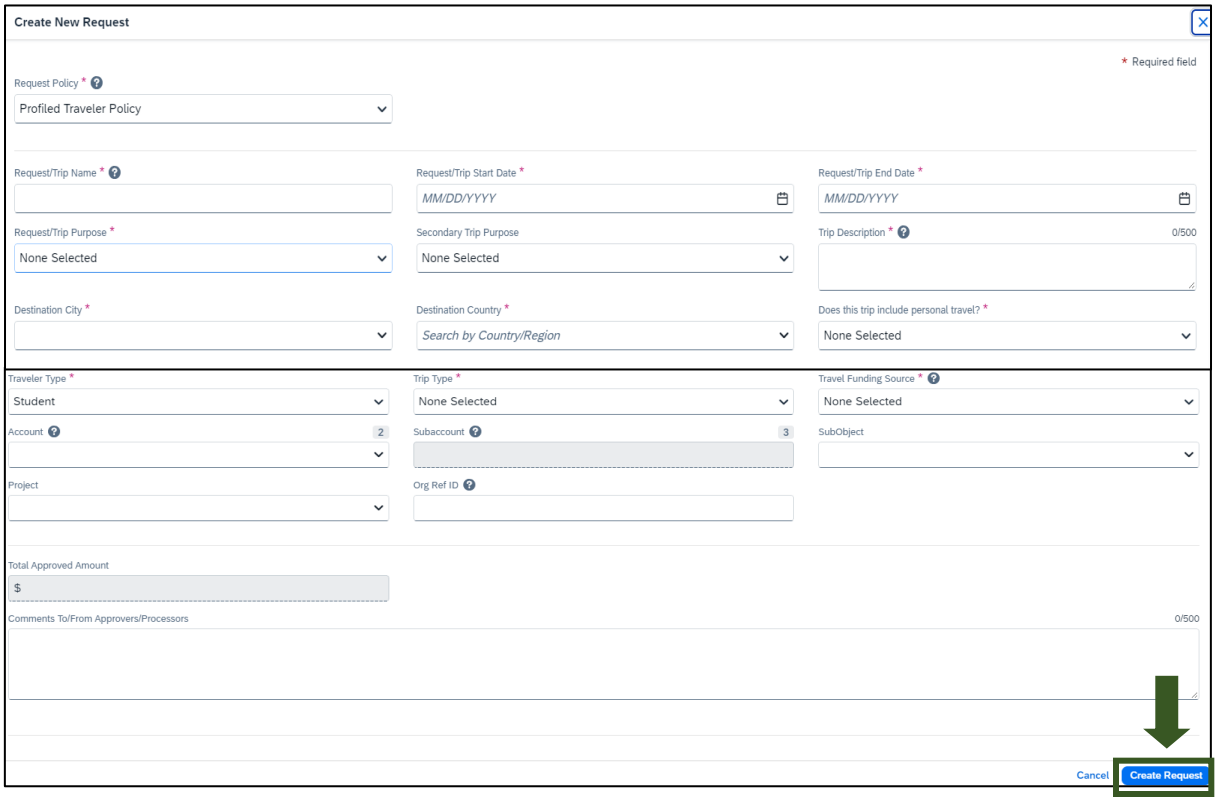

Exhibit 2

3. In the **Expected Expenses** section, select **Add** and enter estimated amounts for each trip expense. Select all expense types that apply.

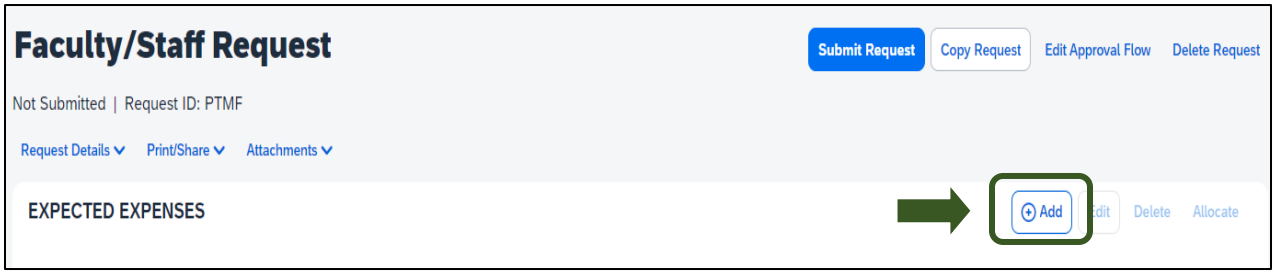

Exhibit 3

How to Manage an Employee Request

Common expenses are *Air Ticket, Car Rental, Hotel Reservation, and Daily Meal Per Diem Allowance.*

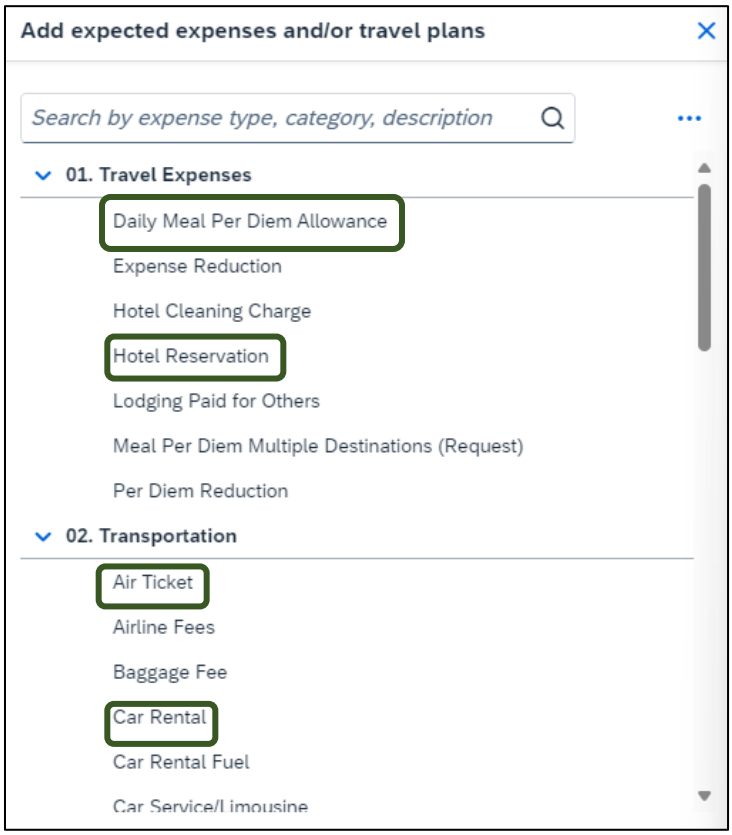

Exhibit 4

5. To add documents for Approvers review, select the **Attachments** dropdown menu
>**Attach Documents**
>**Upload and Attach**
>Double click the file you want to upload.

NOTE: Documents attached to a Request are not available in the Expense Report.

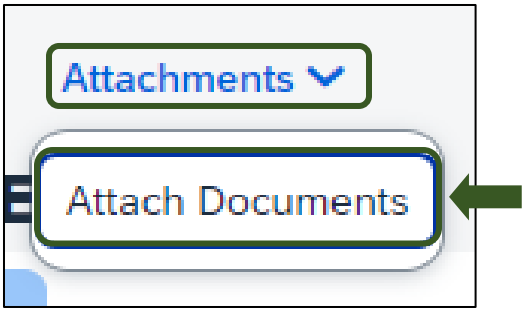

Exhibit 5

NOTE: Preferred attachment formats are JPEG or PDF.

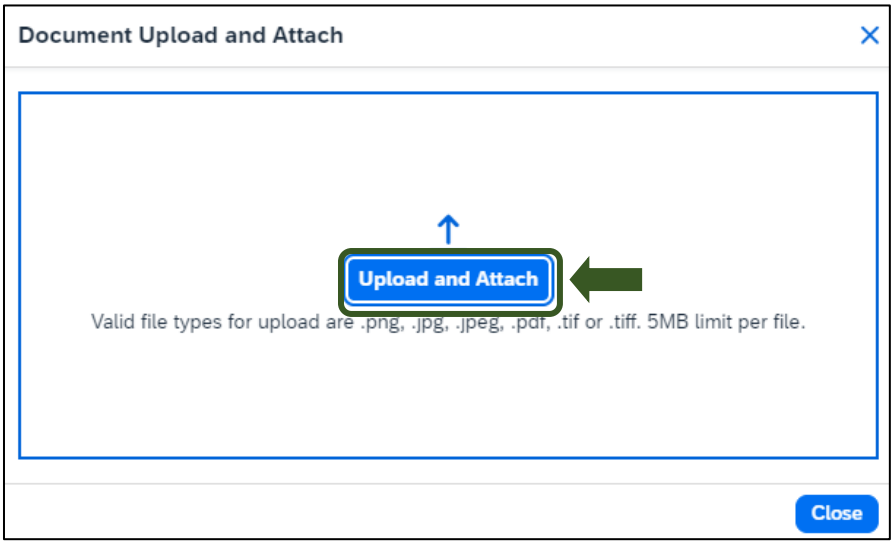

Exhibit 6

How to Manage an Employee Request

6. The red folder icon will indicate the file is uploaded for your Approvers review.

Exhibit 7

7. After all Expected Expenses have been added, select **Submit Request.**

Exhibit 8

8. Select **Accept & Continue** to send the Request to the next workflow step.

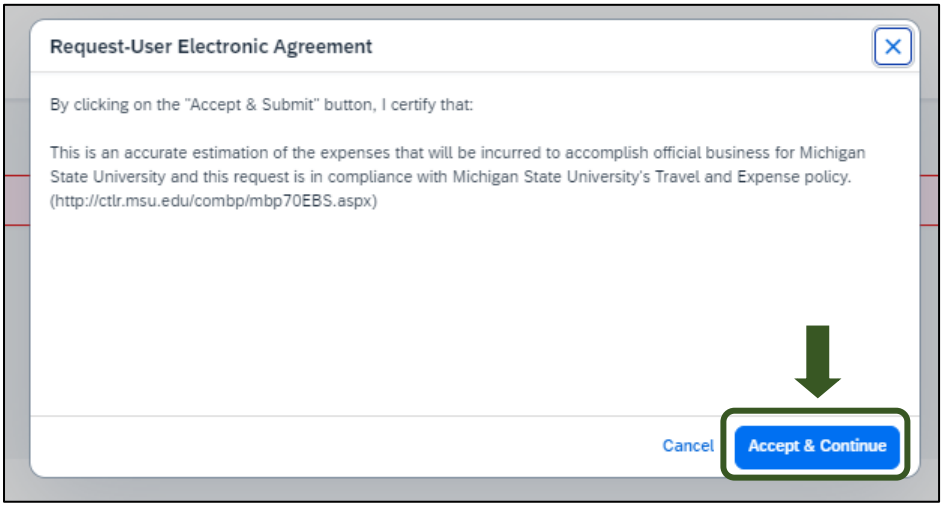

Exhibit 9

NOTE: The Request tile displays the Request 4 digit ID and the name of the individual/workflow step that is pending to grant approval.

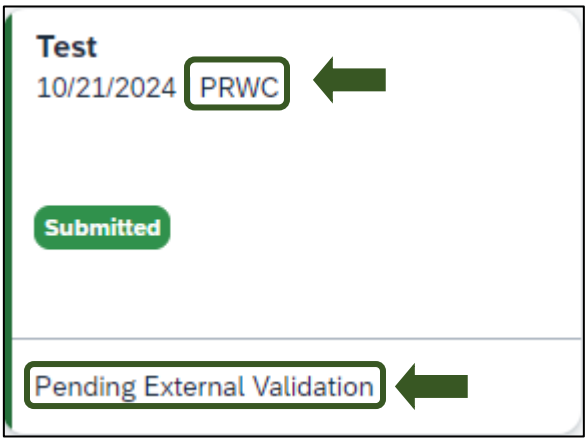

Exhibit 10

How to Manage an Employee Request

Copy a Request

1. Start at the **Concur Homepage**, select **Home** >**Requests**.

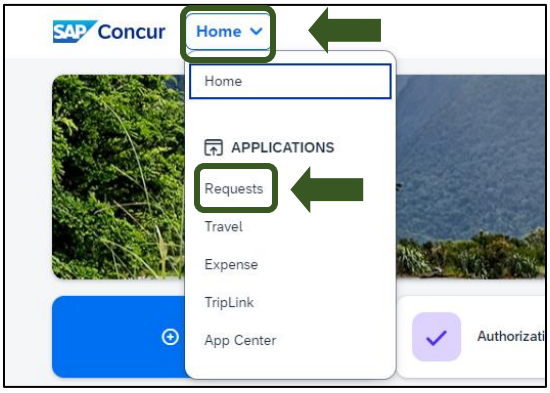

Exhibit 11

2. Select the Request you would like to Copy.

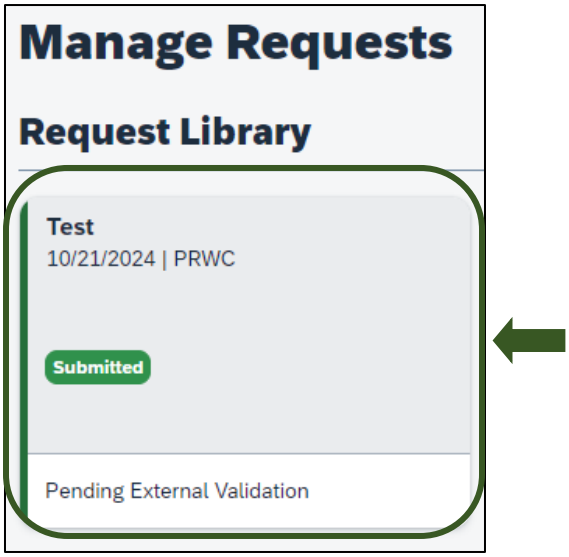

Exhibit 12

3. Select **Copy Request**.

Exhibit 13

4. By default, Concur assigns a New Request Name for the copy. Change it, if desired.

5. **Create New Request**.

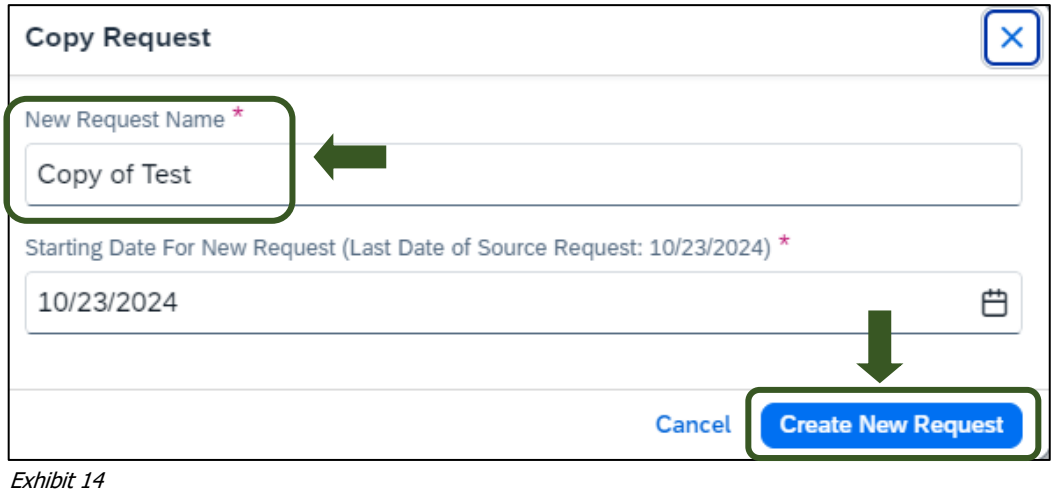

Exhibit 14

How to Manage an Employee Request

6. If you need to edit the dates for your Copy Request, once you **Create New Request**, select **Request Details** >**Edit Request Header**.

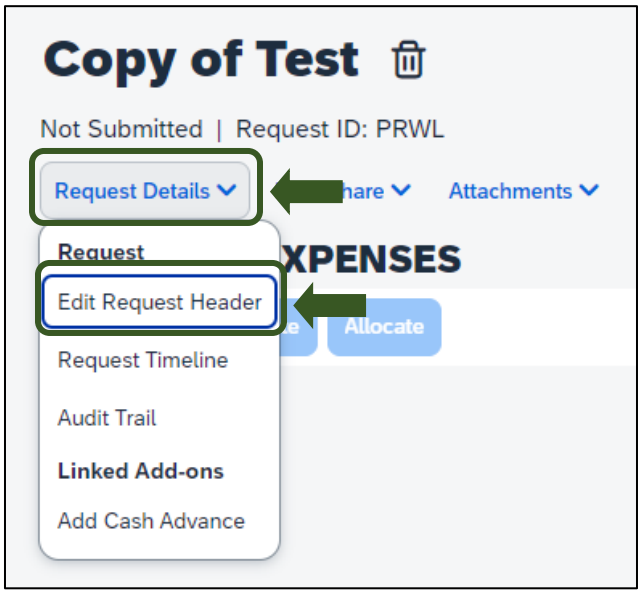

Exhibit 15

7. When you have completed all your edits in the Copy Request, select **Submit Request**.

Exhibit 16

8. Select **Accept & Continue** to send the Request to your Approver/next workflow step.

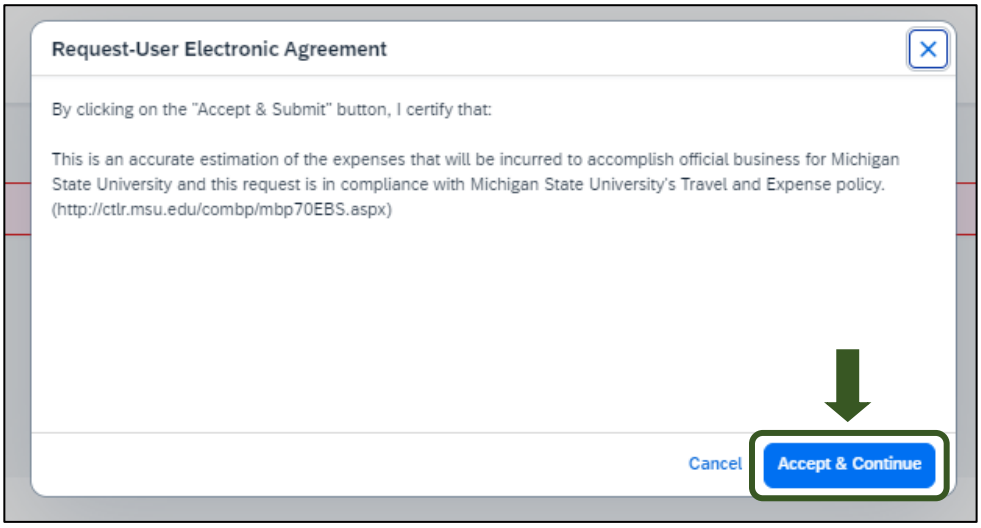

Exhibit 17

NOTE: The Request tile displays the Request ID and the name of the individual/workflow step that is pending to grant approval.

Exhibit 18

How to Manage an Employee Request

Delete a Request

NOTE: If your Request was already submitted, please refer to the **Recall a Request** section for instructions.

1.To delete a not submitted Request, start at the **Concur Homepage** and select **Home** >**Requests** >Request you wish to delete.

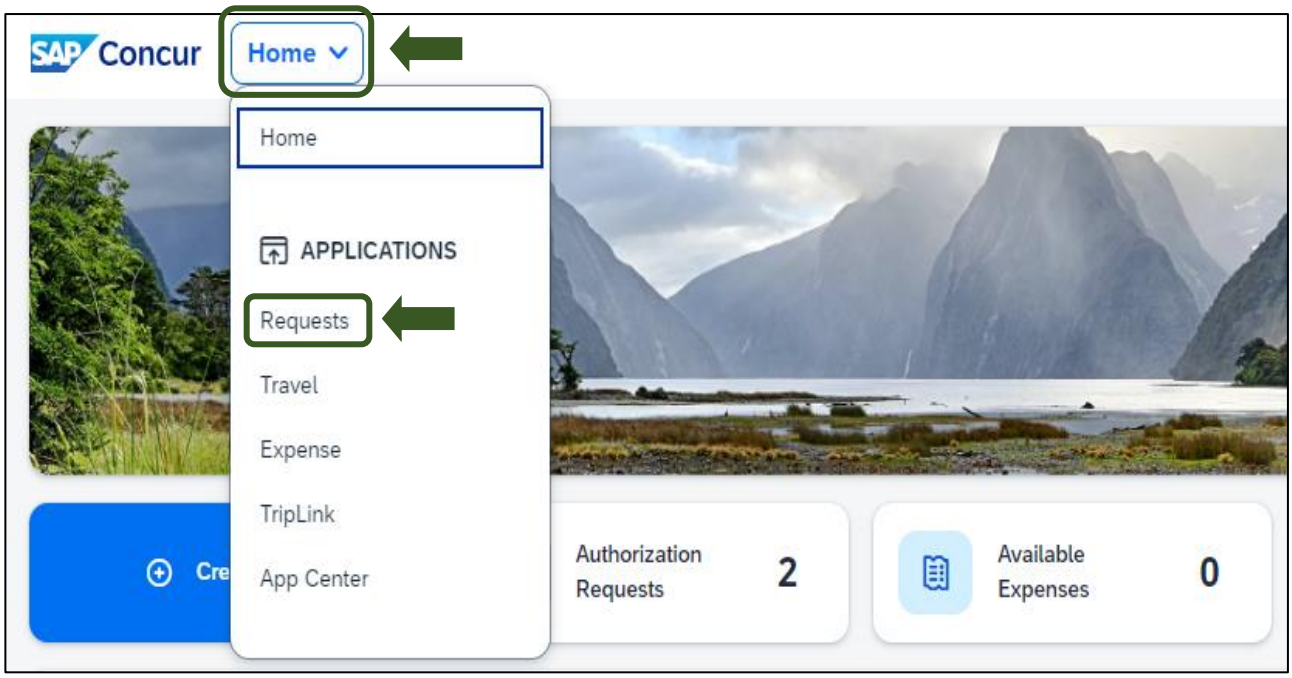

Exhibit 19

2. Select the **Trash Can** >**Yes**.

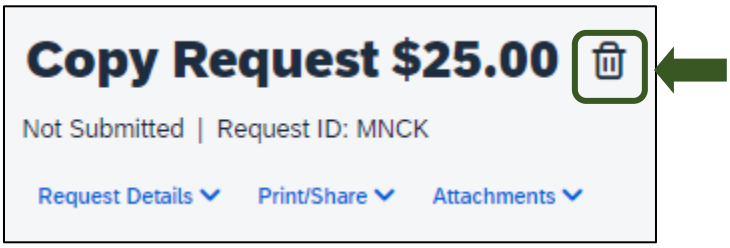

Exhibit 20

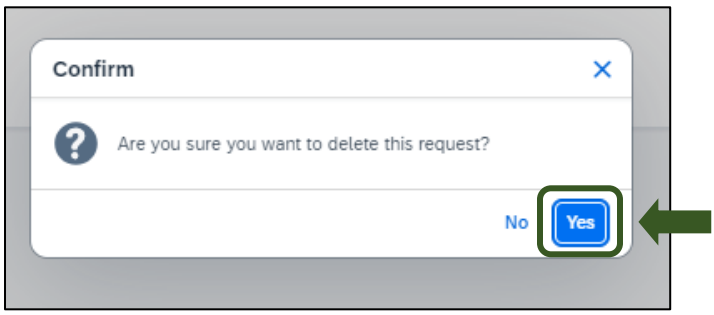

Exhibit 21

How to Manage an Employee Request

Recall a Request

You cannot change, cancel, or delete a Request that is in submitted status unless you recall it first.

1. Start at the **Concur Homepage**, select **Home** >**Requests** >Request you wish to recall.

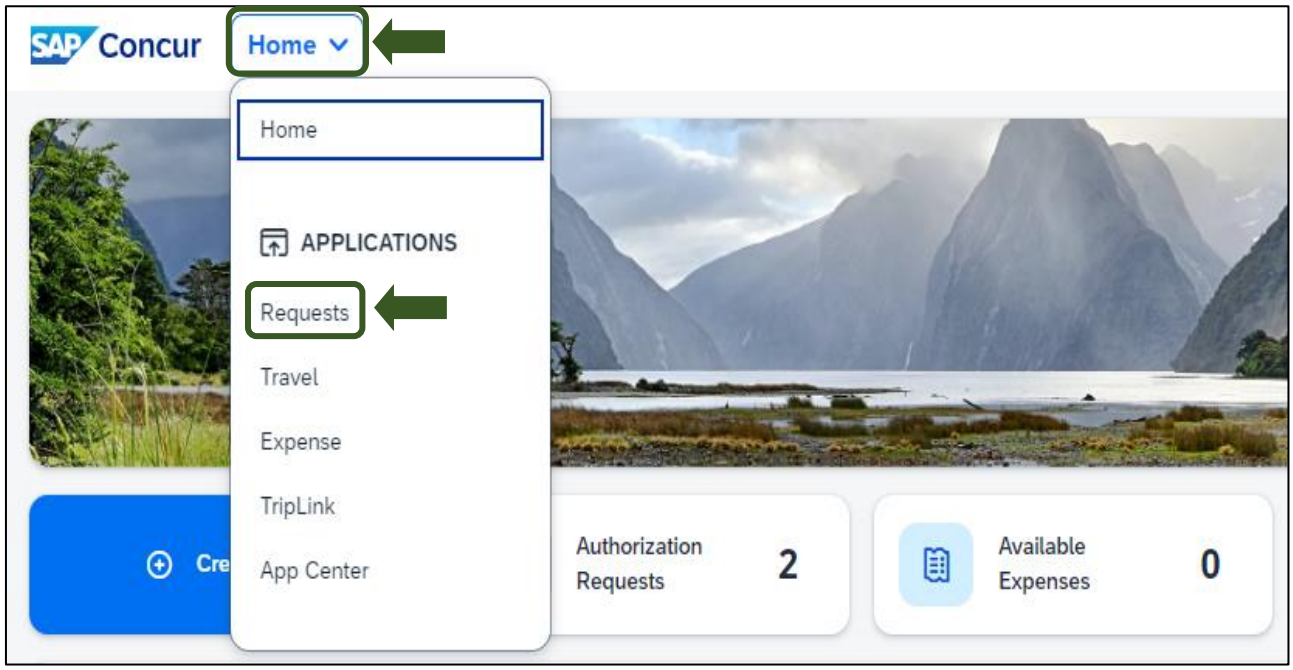

Exhibit 22

2. Select **Recall** >**Yes**.

Exhibit 23

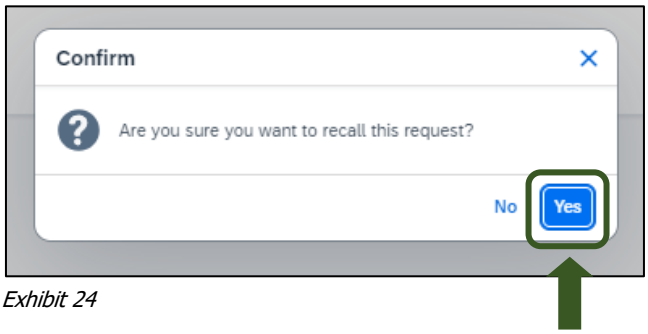

Exhibit 24

3. When you have completed all edits in the Recalled Request and your Request is ready, select **Submit Request**.

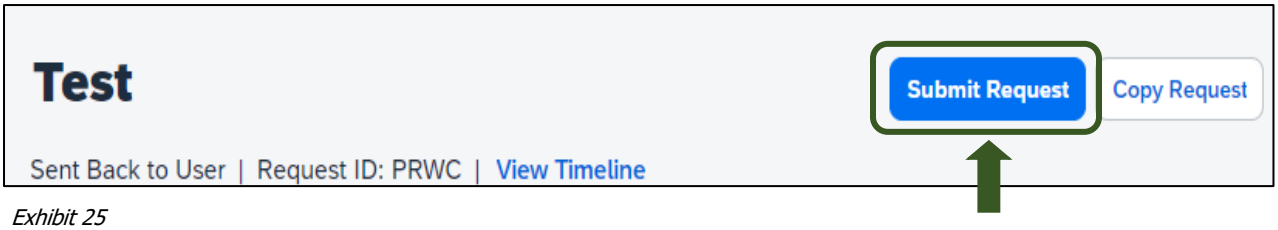

Exhibit 25

How to Manage an Employee Request

4. Select **Accept & Continue** to send the Request to the Approver.

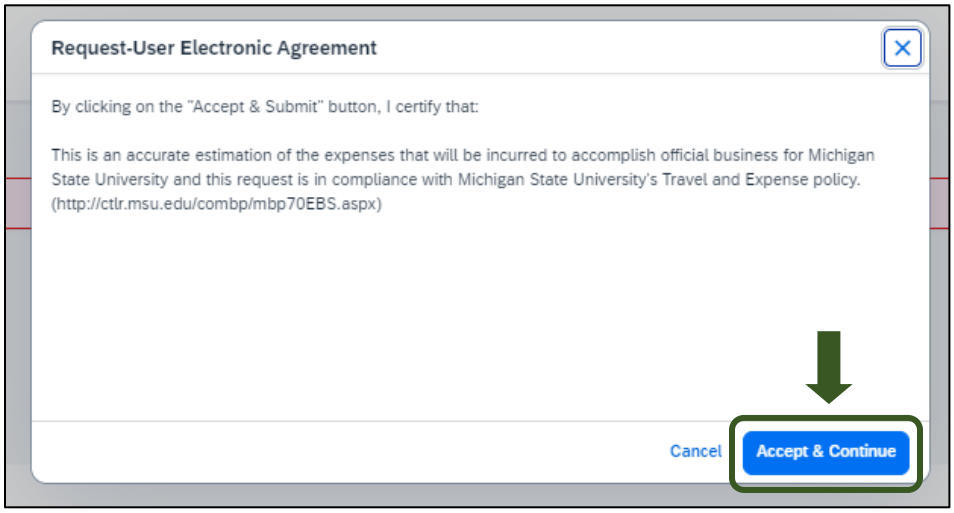

Exhibit 26

NOTE: The submitted Request tile displays the Request ID and the name of the individual/workflow step that is pending to grant approval.

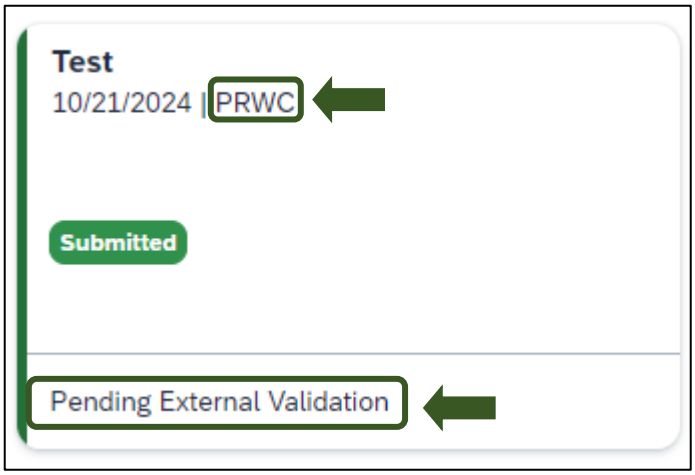

Exhibit 27

Edit a Request

1. Start at the **Concur Homepage**, select **Home** >**Requests** >Request you wish to edit.

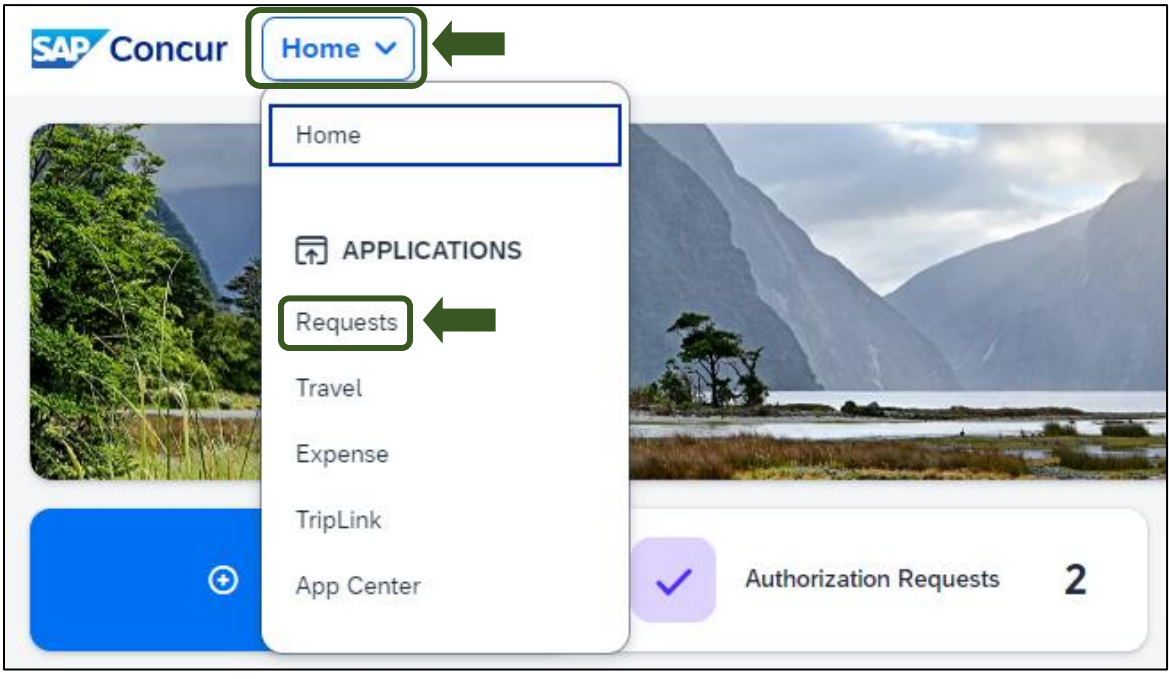

Exhibit 28

How to Manage an Employee Request

2. To edit Request Header, select the **Request Details** dropdown menu
>**Edit Request Header**
>Make the changes and select **Save**.

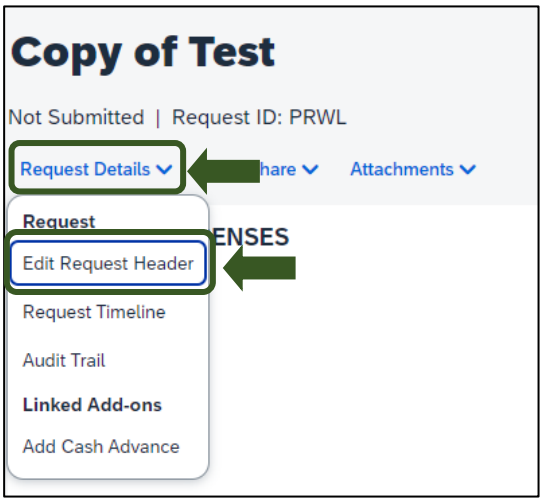

Exhibit 29

3. To edit Expected Expenses, check the box next to the **Expense** you'd like to edit.
> Select **Edit**
> Make the changes and select **Save**.

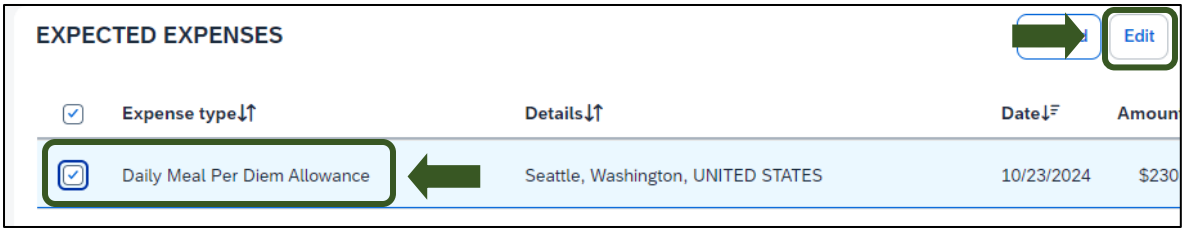

Exhibit 30

4. When you have completed all edits in the Request, select **Submit Request**.

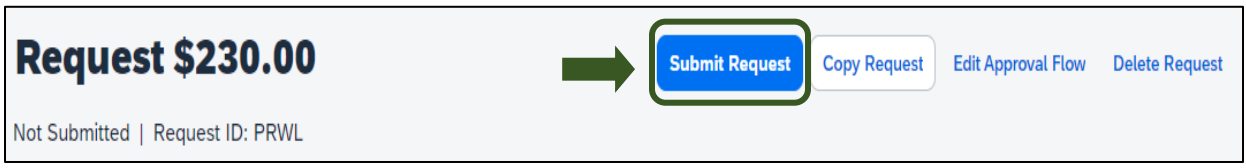

Exhibit 31

How to Manage an Employee Request

5. Select **Accept & Continue** to send the Request to the Approver.

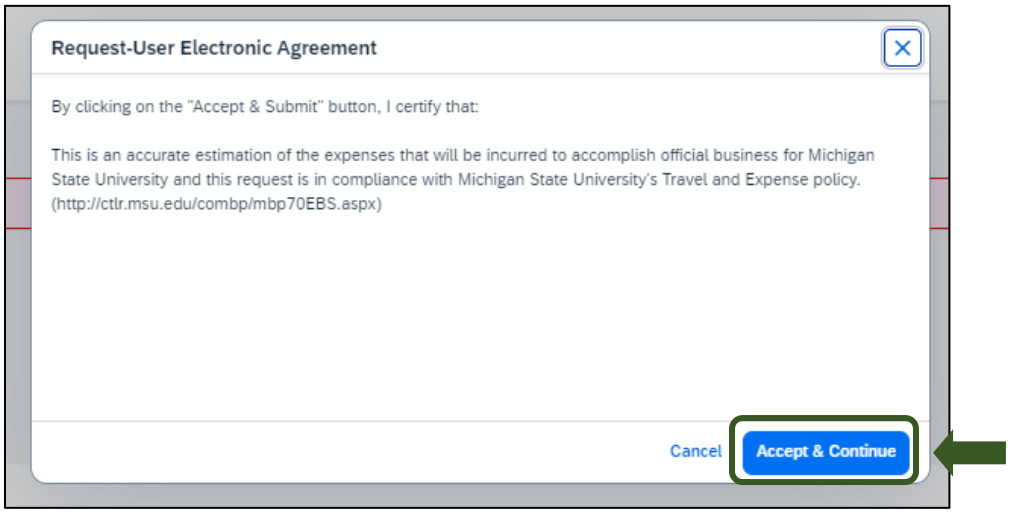

Exhibit 32

NOTE: The submitted Request tile displays the Request ID and the name of the individual that is pending to grant approval.

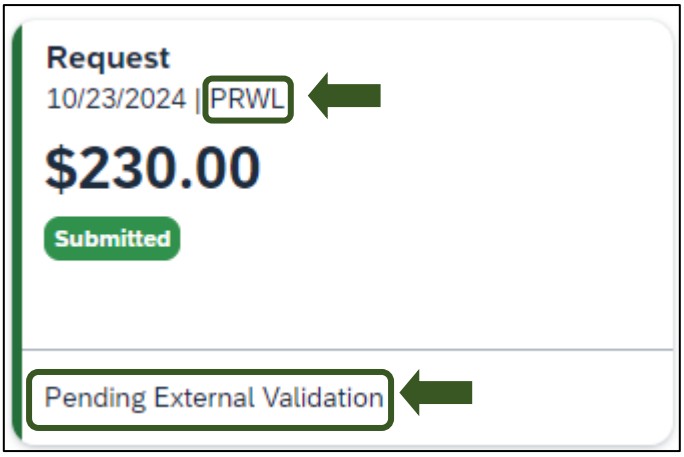

Exhibit 33

How to Manage an Employee Request

Print a Request

1. Start at the **Concur Homepage**, select **Home** >**Requests** >Request you wish to print.

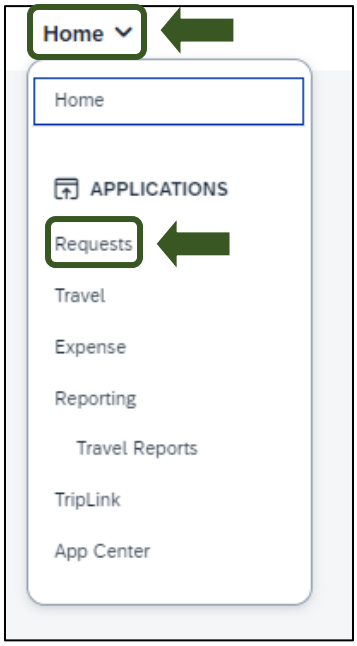

Exhibit 34

2. Select **Print/Share** >**MSU-Request Printed Report**.

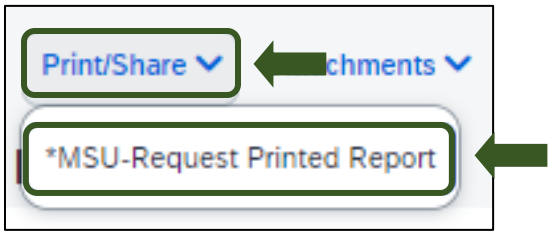

Exhibit 35

3. Print options include Print, Save as PDF, and Email.

Exhibit 36

How to Manage an Employee Request

Close Request

Requests do not close based on processing Expense Reports, either the traveler closes the Request when they want, or 95 days after the Trip End Date, it closes automatically. When a Request is closed, the Encumbered funds are removed from the account. To manually close a Request, follow below.

1. Start at the **Concur Homepage**, select **Home** >**Requests** >Request you wish to close.

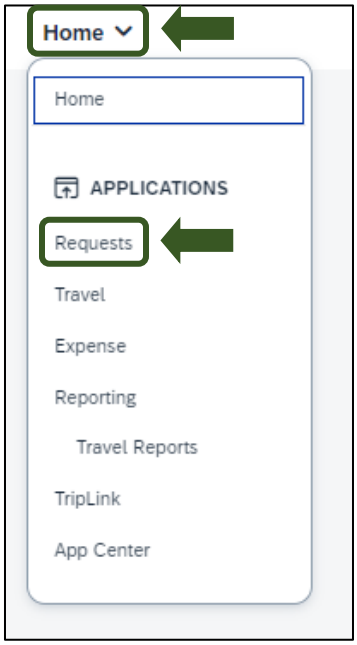

Exhibit 37

2. Select the **Close Request**.

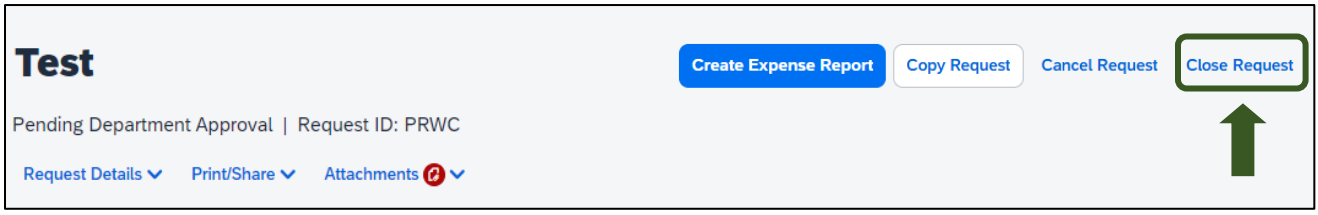

Exhibit 38

3. The Cancel Request confirmation screen will appear; select **OK**.

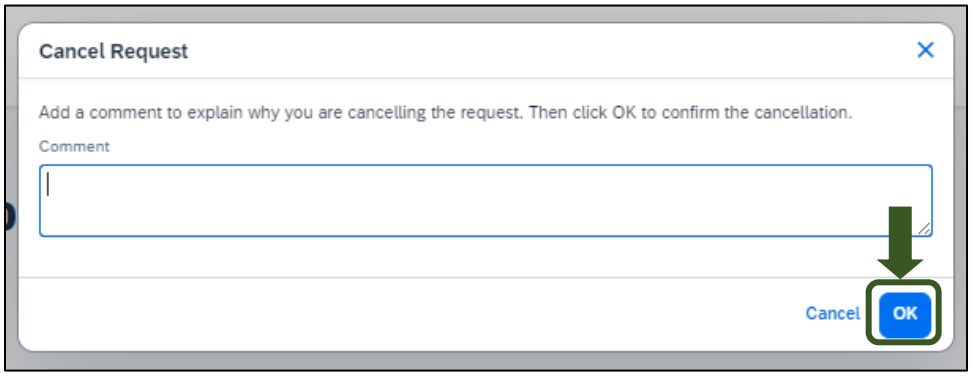

Exhibit 39

How to Manage an Employee Request

Request Cash Advance

1. Start at the **Concur Homepage**, select **Start a Request**.

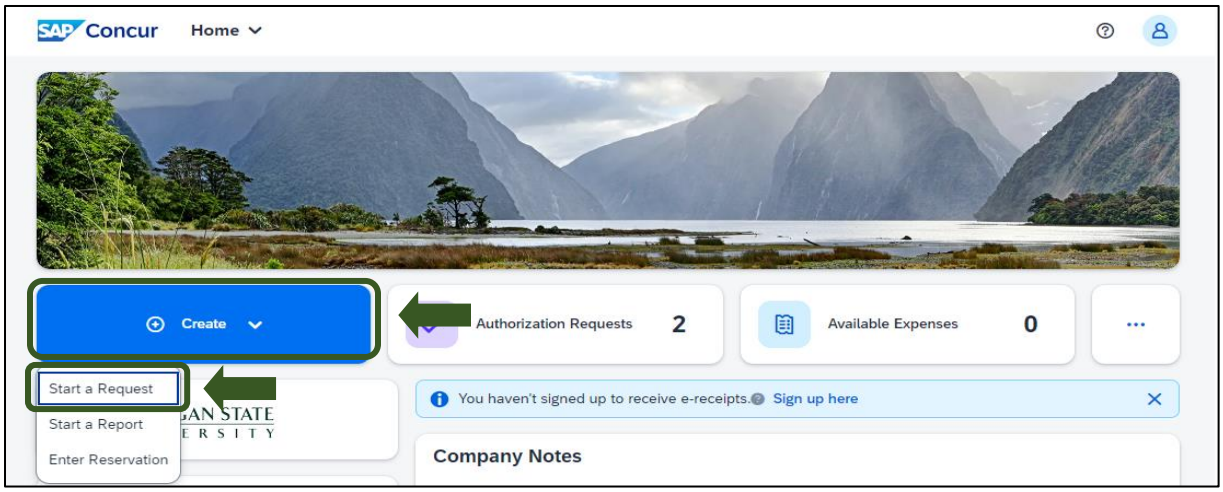

Exhibit 40

OR

Start at the **Concur Homepage**, select **Home** >**Requests** >**Create New Request** or select a previously created Request.

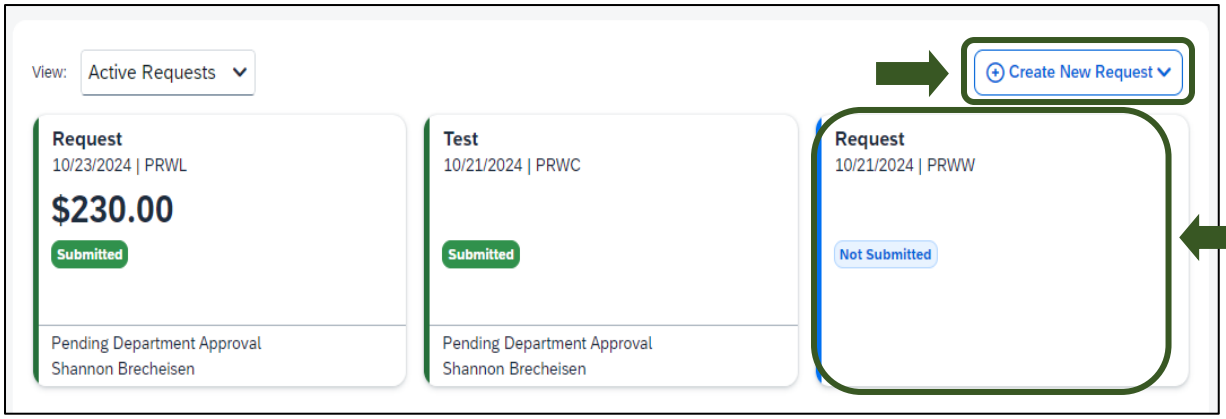

Exhibit 41

2. Within the Request, select the **Request Details** dropdown menu >**Add Cash Advance** (under Linked Add-ons).

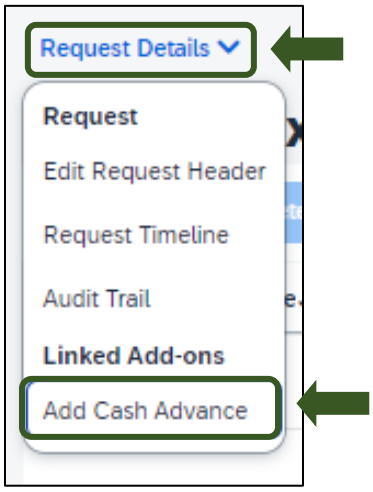

Exhibit 42

How to Manage an Employee Request

3. Add the Cash Advance Amount, Currency, and any Comments >**Save**.

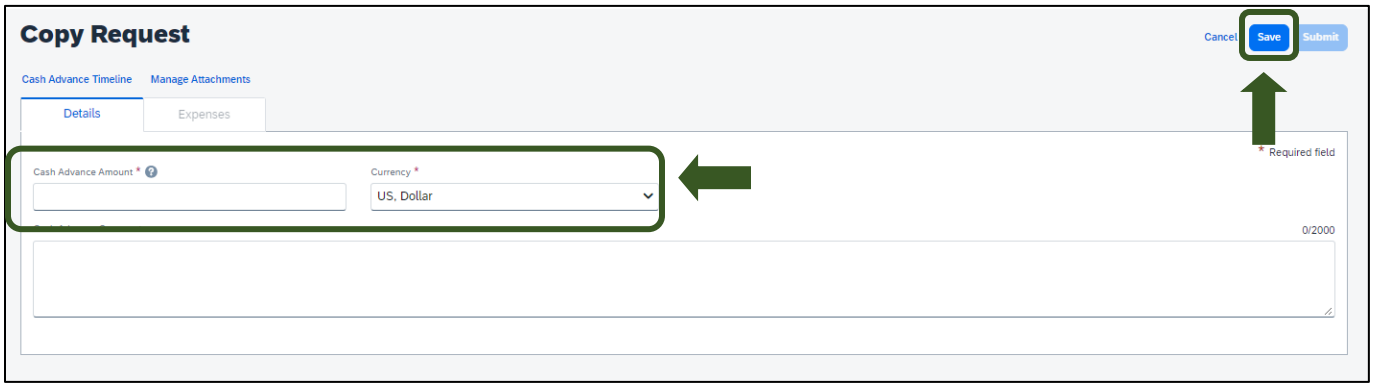

Exhibit 43

4. Cash Advance is approved after Request is submitted, and approval is final.

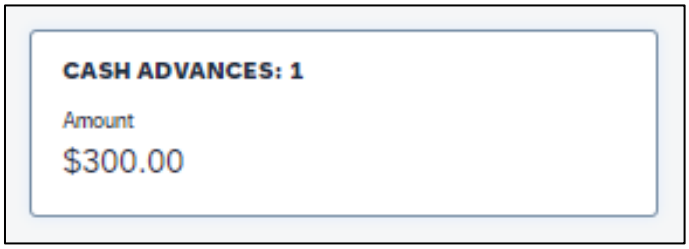

Exhibit 44

How to Manage an Employee Request

Delete Cash Advance

1. If you have not yet submitted the Request, you can remove the Cash Advance by selecting the Request >**Cash Advances**.

Exhibit 45

2. Select the **Trash Can**.

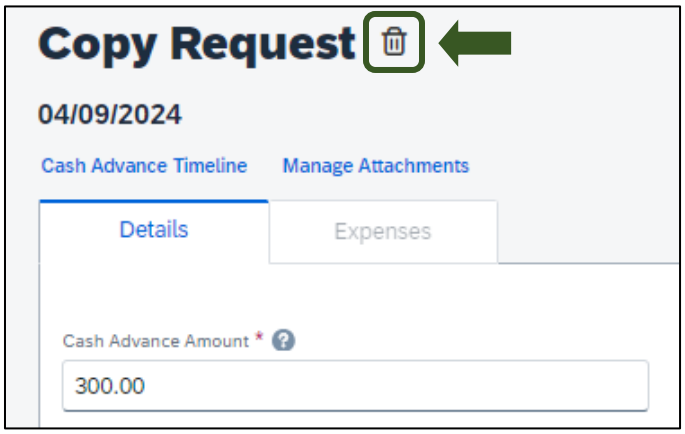

Exhibit 46

How to Manage an Employee Request

Link Request to Expense Report

1. Start at the **Concur Homepage**, select **Home** >**Requests** >Request you wish to link.

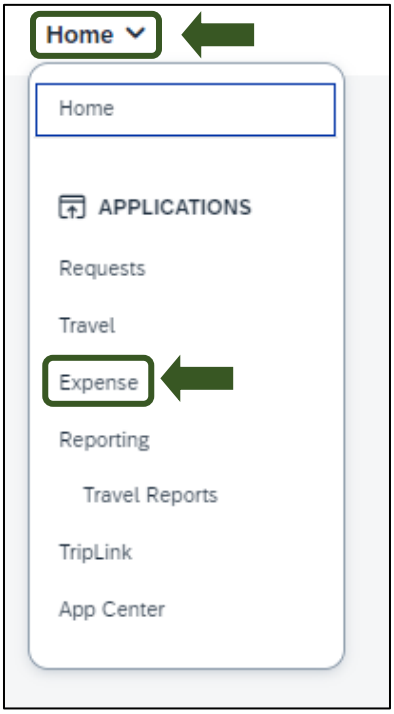

Exhibit 47

2. Click **Create Expense Report**. You will then be brought to the Expense Report screen where you can fill out the Report Details and Expenses incurred while traveling.

Exhibit 48

How to Manage an Employee Request

Add Approvers to Approval Flow

When creating a Travel Request in MSU's Concur system, Michigan State University employees can add Approvers to the Approval Flow.

1. Start at the **Concur Homepage**, select **Home** >**Requests**.

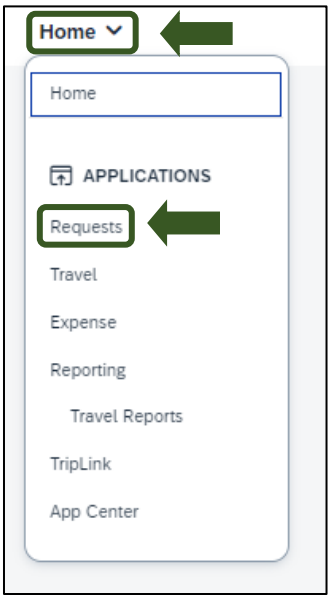

Exhibit 49

2. On the Manage Requests screen, select the Request you would like to add an Approver to.

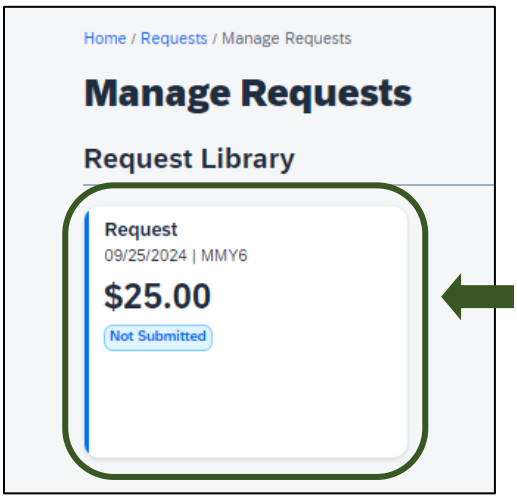

Exhibit 50

How to Manage an Employee Request

3. On the Request screen, select the **Request Details** dropdown menu >**Request Timeline**.

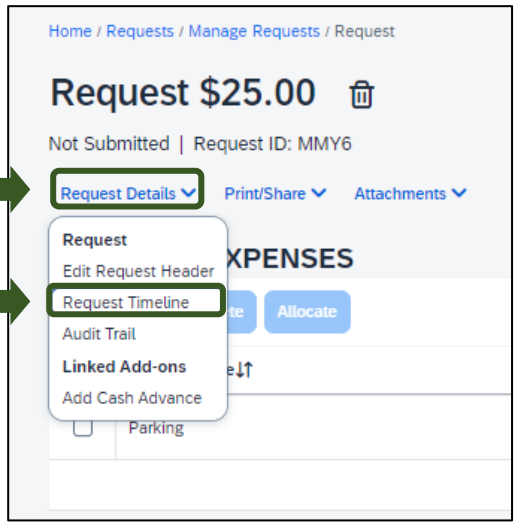

Exhibit 51

4. Once you are on the Request Timeline page, select **Edit**.

Exhibit 52

5. On the Edit Approval Flow screen, select **Add Step** in the Approval Flow where you would like to add an Approver.

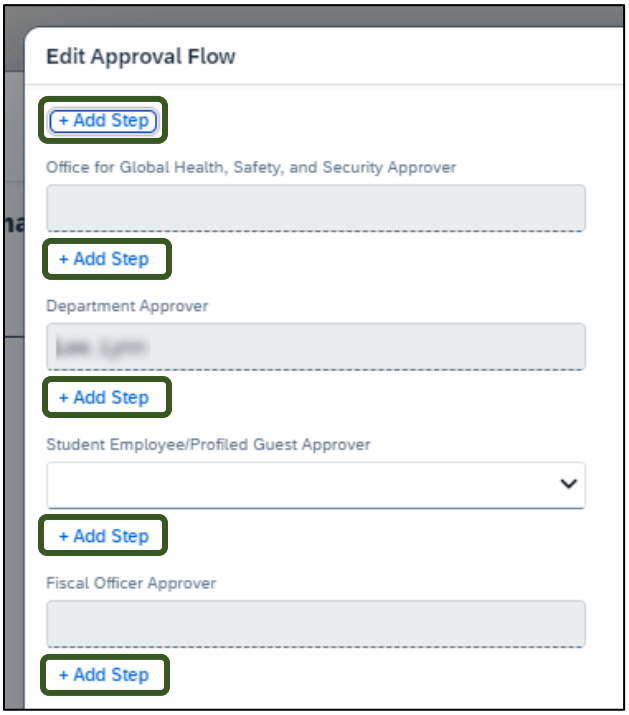

Exhibit 53

How to Manage an Employee Request

6. In the **User-Added Approver** field, enter the name of the Approver you want added into the Approval Flow
>Select the Approvers Name from the dropdown menu
>**Save**.

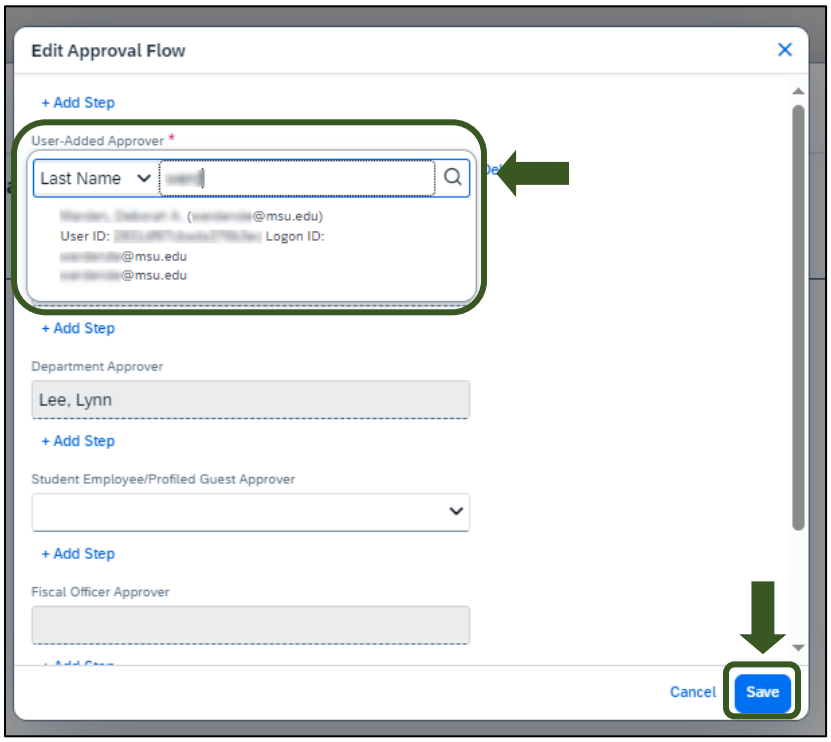

Exhibit 54

7. The added Approver is now visible in the Approval Flow.

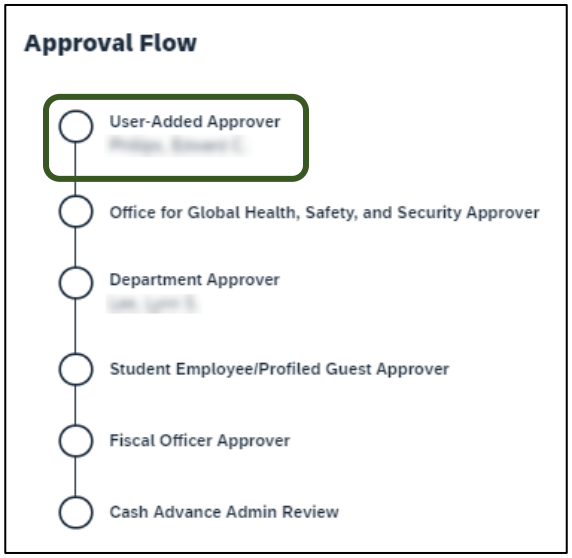

Exhibit 55

8. If your department or business unit requires a comment when adding an approver, select **Add Comment** and enter the department or unit required information
>**Save**.

Exhibit 56

Exhibit 57

How to Manage an Employee Request

9. You will now see the added comment. >**Close**.

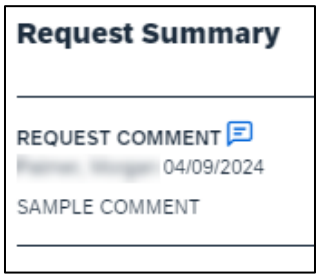

Exhibit 58

Exhibit 59

10. Once your request is completed, select **Submit Request**. Your Request will now route the Approvers in the Approval Flow.

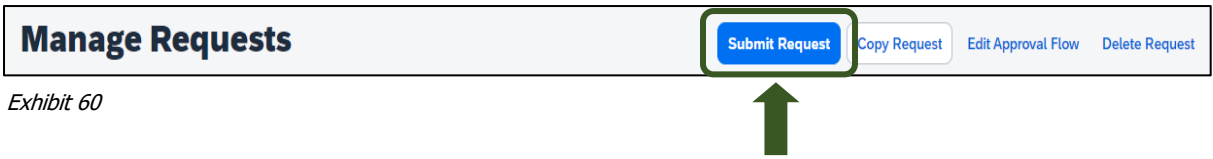

Exhibit 60

How to Manage an Employee Request

Common Alerts in Request

This chart shows the types of warnings or errors that would be presented. NOTE: Warning messages will still allow you to Submit the Request. Error messages need your action to fix the error to be able to Submit the Request. There is an information icon next to each Warning or Error Message, if you have further questions, please contact concurhelp@msu.edu

Warning	Error
Trip start date is in the past.	Travel is MSU funded; please add the account number.
Please verify: Segment departure and arrival dates are not within the Request header start and end dates.	Travel is not MSU funded; please remove the account number.
Please verify: Segment departure date is in the past.	Please remove the Cash Advance as this travel is not MSU funded.
The secondary Trip Purpose must be different.	The Per Diem/Expense Reduction must be a negative amount. Please return to the expense and adjust accordingly.
This Request was submitted by a delegate.	Requests cannot be entered with a Trip End date greater than 120 days in the past.
This Request includes a Cash Advance. Approval of this Request also approves the Cash Advance.	You requested a Cash Advance amount greater than projected expenses (airfare not included).
This Request was approved by a delegate.	The cash advance must be in the US Dollar currency.
There are attachments available for viewing.	The Request has no Segments or Expenses. You must create at least one entry to submit the Request.
Please note that all faculty, staff, and students traveling on MSU sponsored international travel (non-education abroad) must register their travel in the MSU Global Travel Registry before departure.	The Request has no Segments and is an international trip type. You must create at least one entry within the Segments tab to submit the Request.
New Travel Requirements for the United Kingdom: Beginning January 8, 2025, passport holders from most visa-exempt countries, including the United States, will be required to present an electronic travel authorization (ETA) to enter the U.K. Note that ETAs can take up to 72 hours to process. To learn more, visit https://www.gov.uk/guidance/apply-for-an-electronic-travel-authorisation-eta	

NOTE: The following list reflects other common Warnings

Combined business and personal travel may require airfare quote at time of booking from the MSU Preferred Travel Agencies. See MBP Section 70 for details.
University Owned Vehicle (Motor Pool) is used to request approval to use a Motor Pool vehicle. This will NOT create a reservation. Please contact Transportation Services to reserve a vehicle upon approval of your request.
Faculty, staff or graduate student travelers are eligible for cash advances for international travel only. If an exception is needed for domestic travel, a hardship letter must be attached in the attachments area of the request.