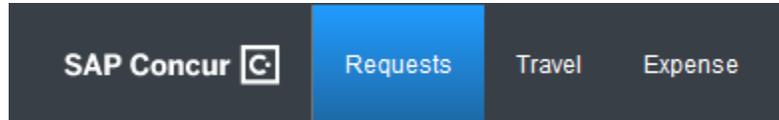




TRAVEL REQUEST APPROVAL

https://www.csum.edu/fiscal-services/concur.html
Accounts Payable Office Adm Bldg, Rm 109

APPROVING TRAVEL REQUEST THROUGH SAP CONCUR



To access Concur: Click [Here](#)

Accessing Expense Reports Pending Approval:

From the Concur Homepage, click one of the following:

<ul style="list-style-type: none"> • Approvals link on the Quick Task Bar 	
<ul style="list-style-type: none"> • Required Approvals link to the left of the left of The California State University banner 	
<ul style="list-style-type: none"> • Required Approvals link found under My Tasks 	

Approval Options:

1. **Approve a submitted Travel Request**

a. Click the name of the request you want to open

Approvals Home Requests Reports

Approvals

00 Trips 01 Requests 00 Expense Reports

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	Workshop at CO	4N6P	MA Traveler, Test	08/10/2021 08/19/2021	07/29/2021	\$513.80

- b. Review Request Header and Expected Expense details for compliance
 - i. Click [Request Details](#) and select [Request Header](#) to review travel information



- ii. Click the Expense Item to view account allocations, comments, and exceptions
Or check the box to display/edit specific expense item details

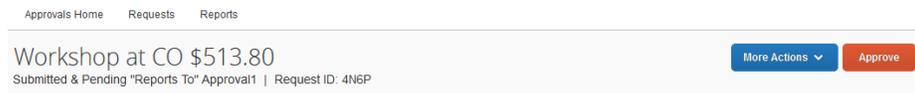
Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add | Edit | Allocate | Delete

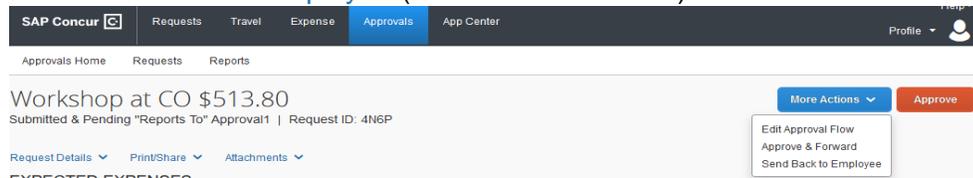
<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested	Approved
<input checked="" type="checkbox"/>	Air Ticket	San Francisco (SFO) - Long Beach (LGB) : Round Trip	08/16/2021	\$120.00	\$120.00	\$120.00
<input type="checkbox"/>	Hotel Reservation	Long Beach, California	08/16/2021	\$180.00	\$180.00	\$180.00
<input type="checkbox"/>	Parking/Tolls		08/16/2021	\$45.00	\$45.00	\$45.00
<input type="checkbox"/>	02. Personal Car Mileage		08/16/2021	\$44.80	\$44.80	\$44.80
<input type="checkbox"/>	04b. Meals - Domestic		08/16/2021	\$110.00	\$110.00	\$110.00
<input type="checkbox"/>	Incidentals		08/16/2021	\$14.00	\$14.00	\$14.00

- c. After reviewing all items, click [Approve](#)



- 2. **Send Travel Request Back to the Employee** –
Approvers cannot modify travel request. If the travel request requires correction, send it back to the Employee.

- a. Click the name of the report you want to open
- b. Click [Send Back to Employee](#) (under [More Actions](#))



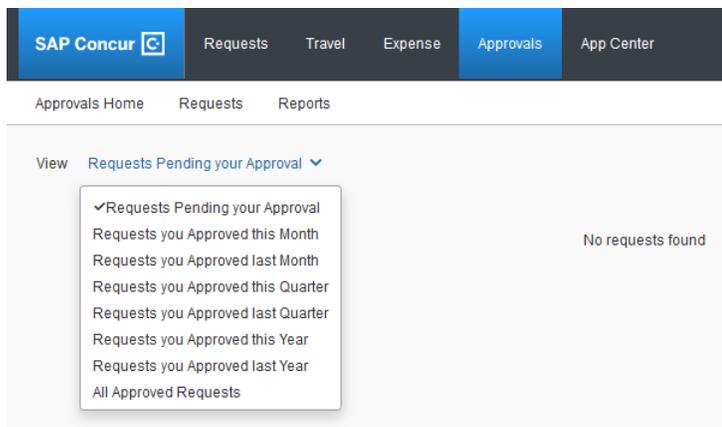
- c. Use the Comment field in the [Send Back to Employee](#) window to explain the reason the request is being returned to the employee, then click OK

COST OBJECT APPROVER = Delegation of Authority (DOA)

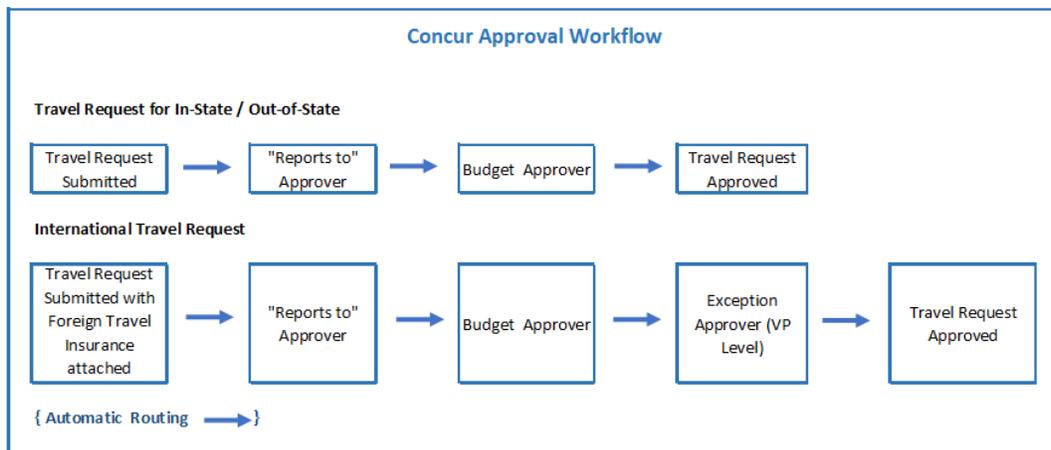
- When entering a Travel Request, the Concur system allows you to charge to one or multiple chartfield designations (split by amount or %).
- If expenses are shared between a home department and an outside department, upon submission, the travel request will simultaneously forward to the appropriate approving authority for that chartfield designation.
- Each approver can take individual action on the travel request. The employee must only make travel reservation once the travel request has been approved by all appropriate approvers.

VIEW APPROVED REQUESTS

- You may go back to review any requests you have already approved
- From the **Approvals** tab, click **Requests**
- On the left side of the screen change your **View** to filter for the reports you want to review



APPROVAL WORKFLOW



Approval flow:

Request Flow	Expense Flow
Domestic	
Traveler submits	Traveler submits
Approver-HR Reports to Supervisor	Approver- HR Reports to Supervisor
Budget Approver 1 - DOA	Budget Approver 1 - DOA
Processor Approve [AP Office]	Processor-Don't Approve

Banned State, International, & High Hazard	
Traveler submits	Traveler submits
Approver-HR Reports to Supervisor	Approver- HR Reports to Supervisor
Budget Approver 1 - DOA	Budget Approver 1 - DOA
Exception – Risk Manager / President Designee	Processor-Don't Approve
Processor Approve	

War Risk	
Traveler submits	Traveler submits
Approver-Supervisor	Approver-Supervisor
Budget Approver 1	Budget Approver 1
Exception – Risk Manager / President Designee	Processor-Don't Approve
War Risk	
Processor Approve	

NOTE: The same procedures apply for locating, reviewing, and approving Expense Reports