SAP Concur

REQUEST APPROVER

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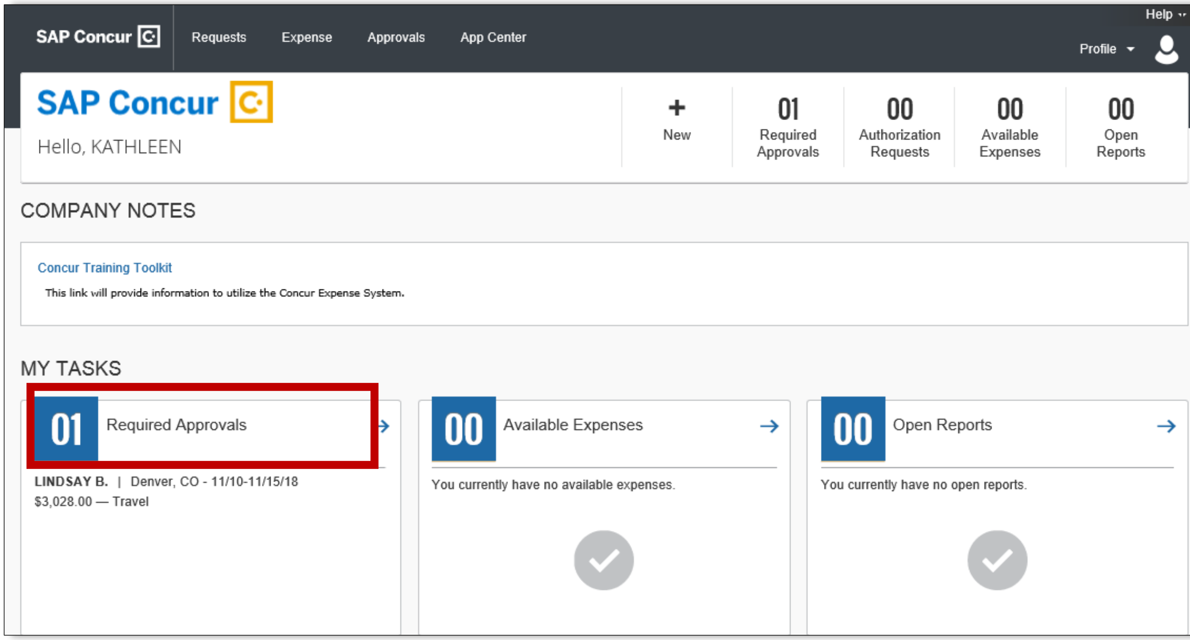
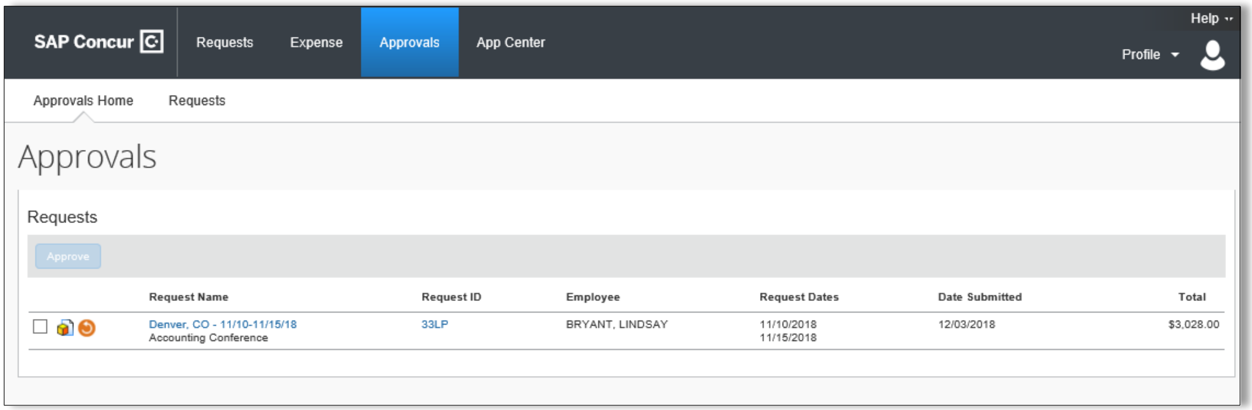
HOME PAGE

As an approver, the requests pending approval will be visible on your home screen in the **Required Approvals** box.



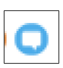
APPROVALS TAB

If there are more reports pending than are visible in this area, you can click on the **Required Approvals** link to be redirected to the **Approvals** tab on the menu bar.



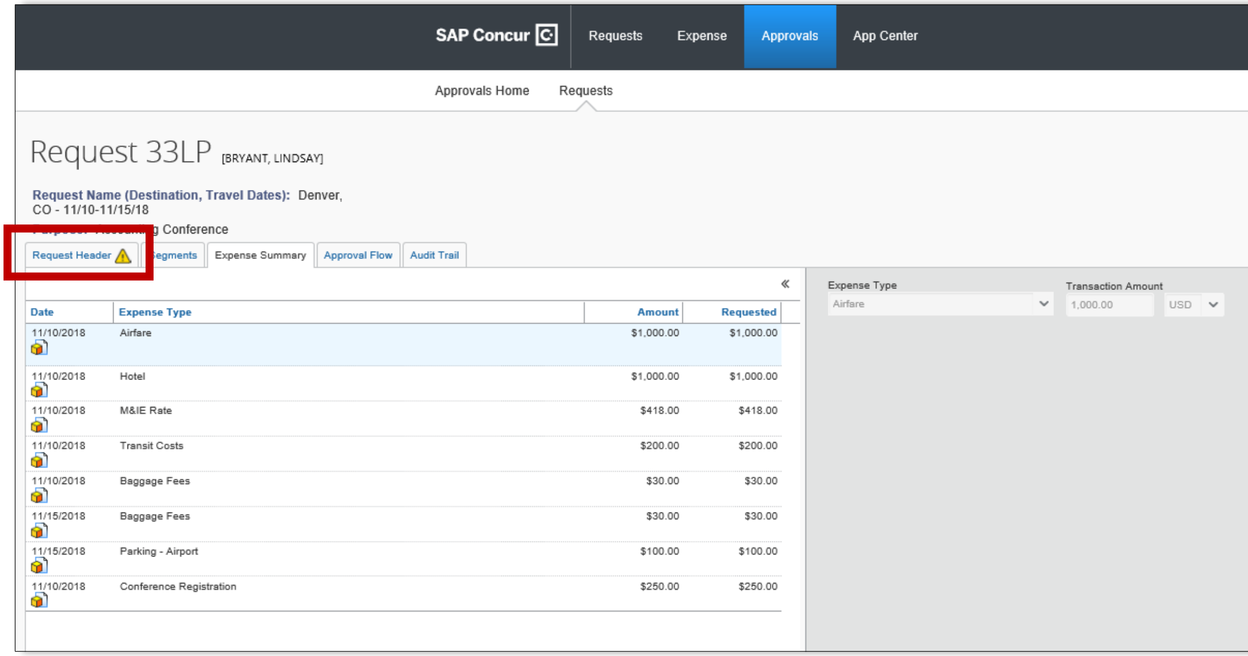
1. Select the **Report Name** you wish to review. Note: The icons to the left of the report name help the approver identify specific items. You can hover your mouse over the icons to see what they are for or to view the comment.

 Report has been returned.

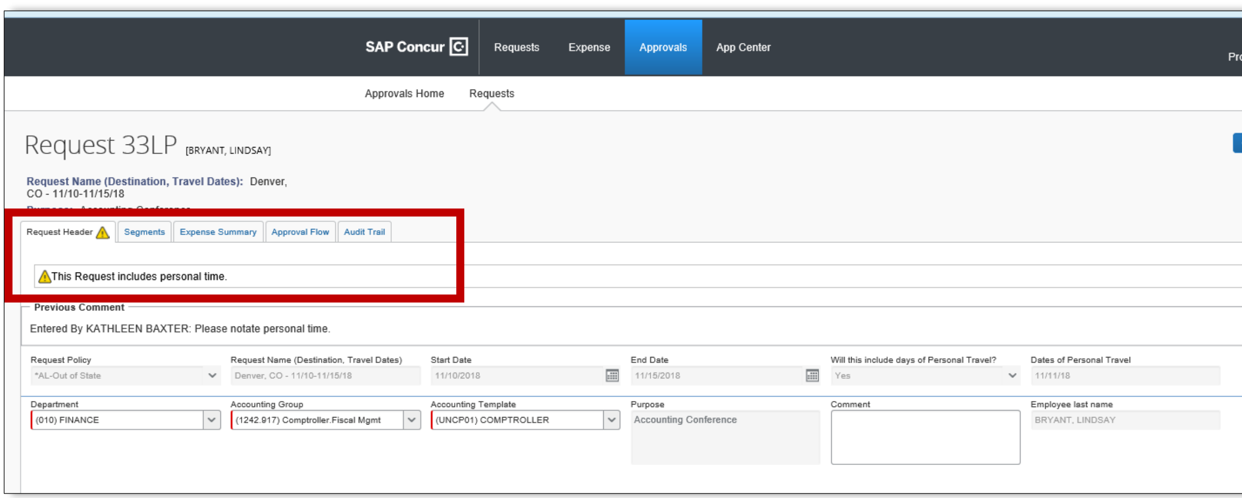
 Comments

EXCEPTIONS

After opening the request, the approver should immediately see any exceptions related to the request. A common exception on requests will be when personal time is included in the travel request.



In this scenario, you will need to click on the Report Header tab to see more details about the exception.



REQUEST HEADER

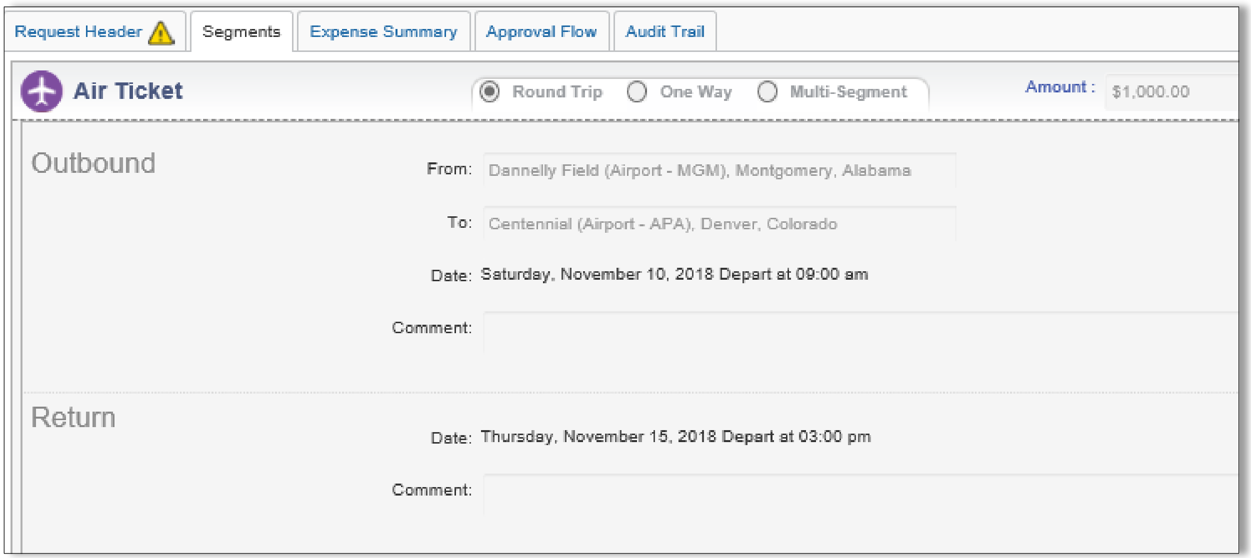
The Request Header tab should be audited for the following information:

- **Request Policy** – The correct policy should be selected for the travel type (Out of State vs Instate Actual). The policy selected on the request will default on the expense report, which will drive how the expenses post in STAARS.
- **Request Name** – The name of the request should be formatted by Destination and Travel Dates. This will help the traveler and all approvers/processors identify requests that need priority.
- **Start Date** – The date the travel begins/traveler departs from base.
- **End Date** – The date the travel ends/traveler returns to base.
- **Will this include days of Personal Travel** – If personal time is included in the trip, traveler must select "Yes".
- **Dates of Personal Travel** – If traveler selected "Yes" from the selection above, the dates of personal travel must be indicated in this field.
- **Department -** This will drive the workflow of the request. Approvers have the capability to change this information if incorrect.
- **Accounting Group** - This will drive the workflow of the request. Approvers have the capability to change this information if incorrect.
- **Accounting Template** - This will drive the workflow of the request. Approvers have the capability to change this information if incorrect.
- **Purpose –** Traveler should indicate the purpose of the travel event.
- **Comment** – This field is for informational purposes only. Any information that will be necessary to aid in the processing of the request can be entered in this field. *Examples: Motor Pool car used, Travel 100% funded by organization, Carpooling with Jane Doe, etc.*

SEGMENTS

The segments tab will be used for details related to Air, Hotel and Car Rental. The amounts provided are estimated because travel cannot be booked until the request is approved. The estimates should be based on a Google search or hotel information provided by the conference.

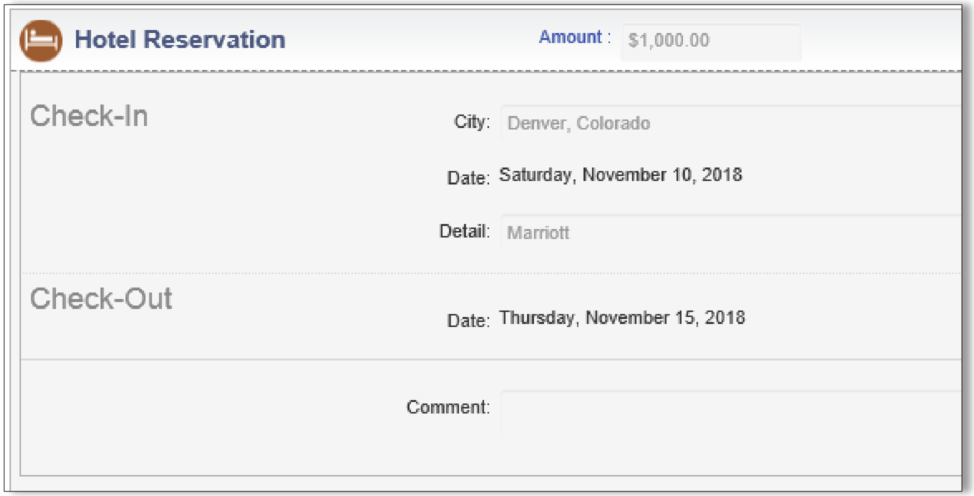
AIR TICKET



The traveler will select either Round Trip, One Way or Multi Segment.

- **Amount** – This amount is an estimate gathered from a Google search. Ticket amounts tend to increase as the travel date approaches. Be sure the amount used is reasonable and will not be less than the actual purchase price, in order to prevent errors when the expense report is created.
- **From**– This will be the airport the traveler is flying out of.
- **To** - This will be the airport the traveler is flying in to.
- **Outbound Date** – The date defaults to the travel Start Date on the Request Header tab. The time is entered by the traveler.
- **Return Date** – The date defaults to the travel End Date on the Request Header tab. The time is entered by the traveler.

Hotel Reservation



Hotel Reservation Amount : $1,000.00

Check-In

City: Denver, Colorado

Date: Saturday, November 10, 2018

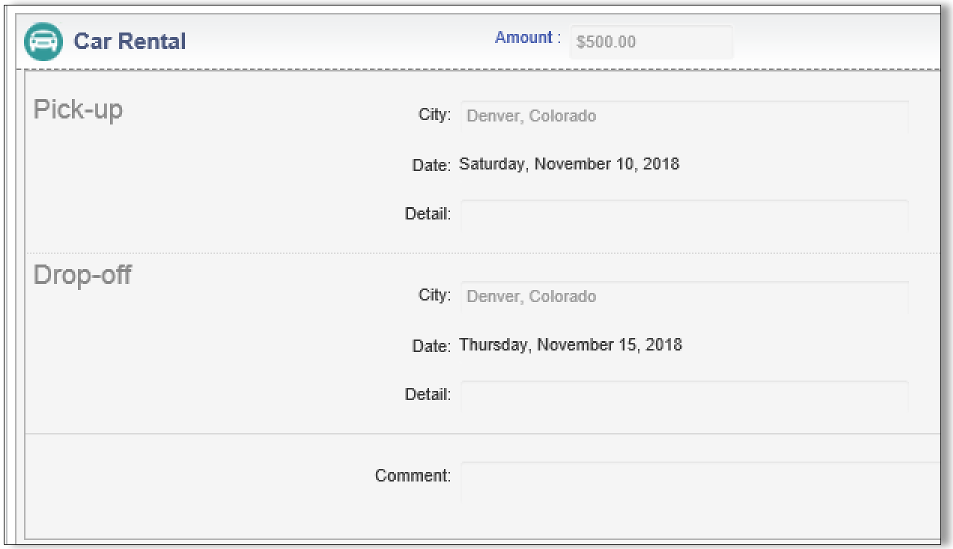
Detail: Marriott

Check-Out

Date: Thursday, November 15, 2018

Comment:

- **Amount** – This amount is an estimate gathered from a Google search or based on pricing provided by the conference.
- **Check-In City** – The city the hotel is located.
- **Check-In Date –** The date defaults to the travel Start Date on the Request Header tab.
- **Detail** – The name of the hotel.
- **Check-Out Date** - The date defaults to the travel End Date on the Request Header tab.



- **Amount** – This amount is an estimate gathered from a Google search.
- **Pick-Up City** – The city the rental car is being picked up.
- **Pick-Up Date** – The date defaults to the travel Start Date on the Request Header tab.
- **Detail** – This field can be used by the traveler for informational purposes.
- **Drop-Off City** – The city the rental car will be dropped off.
- **Drop-Off Date** – The date defaults to the travel End Date on the Request Header tab.
- **Detail** – This field can be used by the traveler for informational purposes.

EXPENSE SUMMARY

The Expense Summary tab is a listing of all expenses requested for the travel. Some of the most common that should be selected are as follows:

- **M&IE Rate** – This will give the total allowable CONUS for the dates and location being traveled.
- **Baggage Fees** – If flight information was keyed on the Segments tab, the traveler should probably have 2 line items for Baggage Fees. Separating into 2 line items will help reconciling in the expense report easier.
- **Conference Registration**
- **Mileage**
- **Airport Parking**
- **Transit Costs –** It is recommended that a traveler request at least $150 unless they have a better estimated cost for transit in the area being traveled.

Request 33LP [BRYANT, LINDSAY]

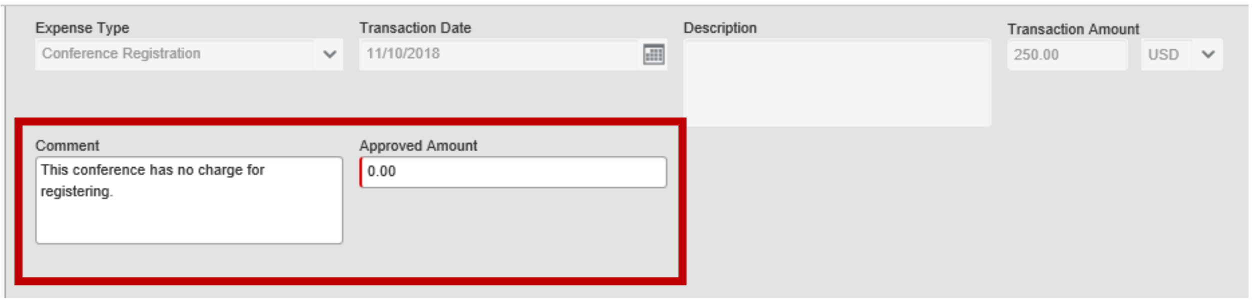
Request Name (Destination, Travel Dates): Denver, CO - 11/10-11/15/18

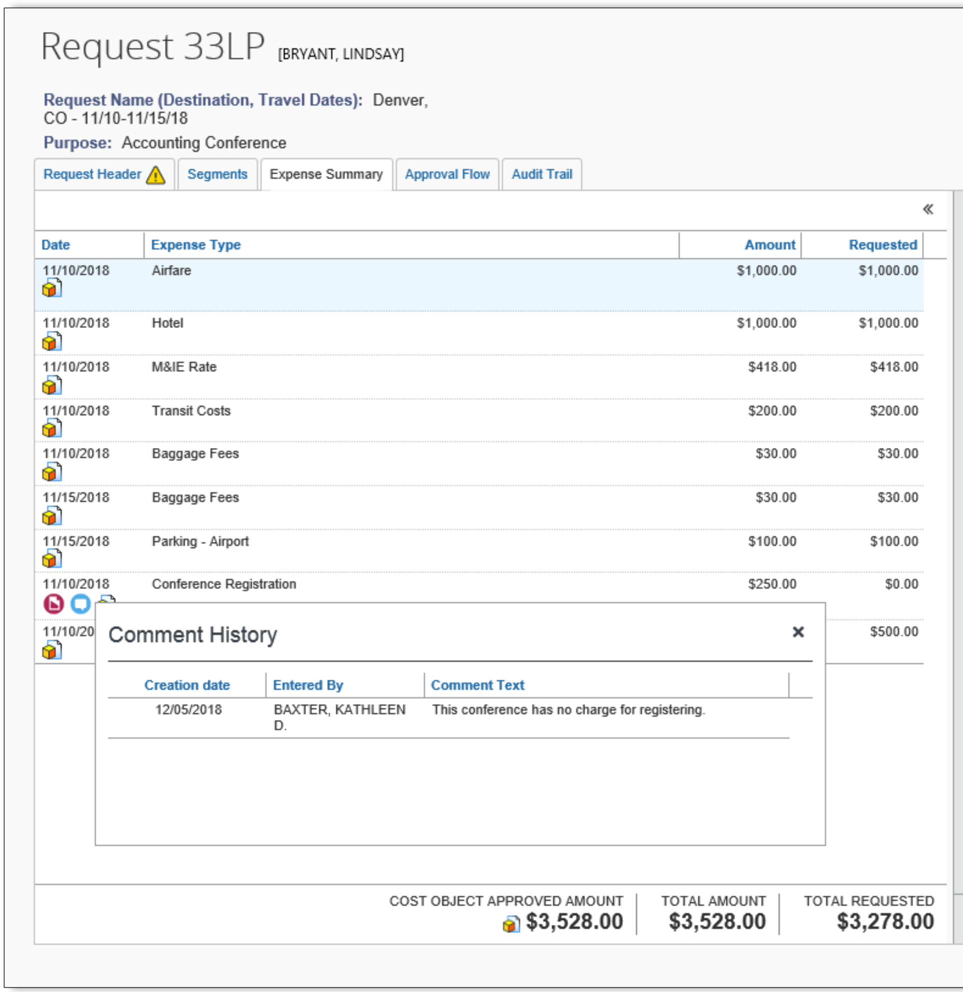
Purpose: Accounting Conference

Request Header | Segments | Expense Summary | Approval Flow | Audit Trail

Date	Expense Type	Amount	Requested
11/10/2018	Airfare	$1,000.00	$1,000.00
11/10/2018	Hotel	$1,000.00	$1,000.00
11/10/2018	M&IE Rate	$418.00	$418.00
11/10/2018	Transit Costs	$200.00	$200.00
11/10/2018	Baggage Fees	$30.00	$30.00
11/15/2018	Baggage Fees	$30.00	$30.00
11/15/2018	Parking - Airport	$100.00	$100.00
11/10/2018	Conference Registration	$250.00	$250.00
11/10/2018	Rental Car	$500.00	$500.00

As an approver, each expense line should be reviewed and the amounts can be edited as necessary. If amounts are changed, please be sure to make a comment explaining the reason for the change.

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11/10/2018	Hotel	$1,000.00	$1,000.00
11/10/2018	M&IE Rate	$418.00	$418.00
11/10/2018	Transit Costs	$200.00	$200.00
11/10/2018	Baggage Fees	$30.00	$30.00
11/15/2018	Baggage Fees	$30.00	$30.00
11/15/2018	Parking - Airport	$100.00	$100.00
11/10/2018	Conference Registration	$250.00	$0.00
11/10/20			$500.00

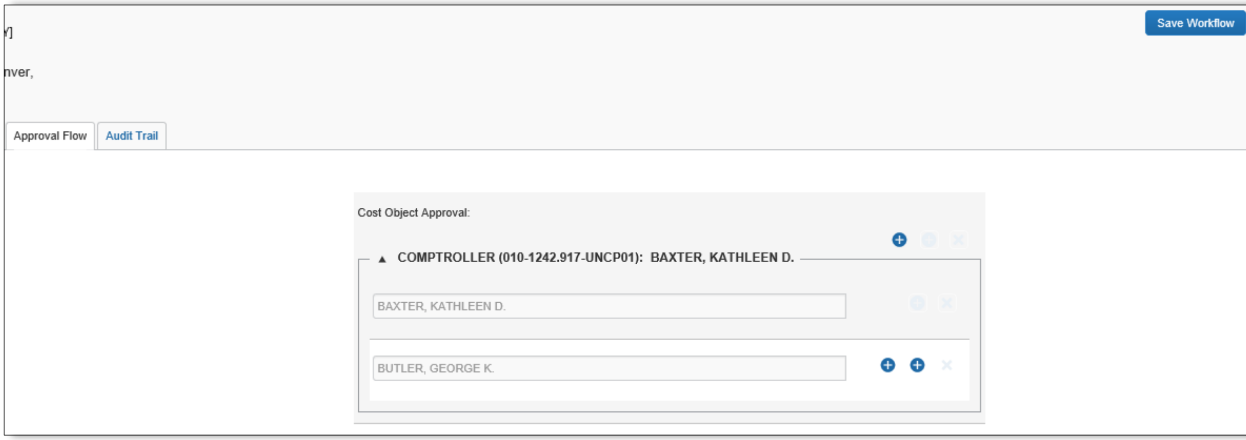
Comment History

Creation date	Entered By	Comment Text
12/05/2018	BAXTER, KATHLEEN D.	This conference has no charge for registering.

COST OBJECT APPROVED AMOUNT $3,528.00 | TOTAL AMOUNT $3,528.00 | TOTAL REQUESTED $3,278.00

APPROVAL FLOW

The Approval Flow tab is used to identify where the Request is in the approval process. An approver has the authority to add workflow to a specific Request if it needs to be looked at by additional people. This is done by selecting the **blue plus icon**. Once changes have been made, be sure to click the **Save Workflow** button at the top right of the screen.

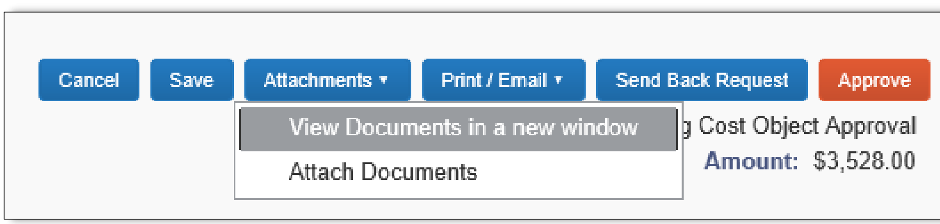


AUDIT TRAIL

This tracks the steps of the request and changes made to it. If requests are sent back to the traveler, all comments are also documented in this area.

ATTACHMENTS

To review attachments, select the **Attachments** button and **View Documents in a new window**.



APPROVE OR REJECT

Once all items on the Request have been reviewed, select the **Approve** button to approve the request or the **Send Back to Employee** button to reject the request back to the traveler for correction.

If you select to send back the report, you will be prompted to add a comment. Select **OK** when done to continue the reject.