



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.

SAP Concur | Requests | Expense | Approvals | App Center | Profile | Help

SAP Concur | + New | 01 Required Approvals | 00 Authorization Requests | 01 Available Expenses | 01 Open Reports

COMPANY NOTES

State of Alabama Concur Website
Training videos and job aids are located on the Comptroller website.

General Notes

- The Instate Actual Certification must be attached to all expense reports relating to instate actual. This form can be found on the Comptroller website under "Online Forms".
- If your agency director requires the CONUS to be reduced by meals provided at a conference, the agenda must be attached to the expense report for verification at the agency level.

MY TASKS

01 Required Approvals → LINDSAY B. Nashville, TN 4/1-4/4/22 \$2,163.50 — Travel	01 Available Expenses → 02/24 NASACT \$300.00	01 Open Reports → 02/21 Mobile, AL 2/17 - 2/20, 2020 \$851.38
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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.

The screenshot shows the SAP Concur interface with the 'Approvals' tab selected. The main content area displays a table of requests. The table has columns for Request Type, Request Name, Request ID, Employee, Request Dates, Date Submitted, and Total. A single request is listed: a Travel request for 'Nashville, TN 4/1-4/4/22 Conference' with Request ID 3977, submitted by BRYANT, LINDSAY, with dates 04/01/2022 to 04/04/2022, submitted on 07/07/2022, and a total amount of \$2,183.50. There is an 'Approve' button above the table and a checkbox to the left of the first row.

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	Nashville, TN 4/1-4/4/22 Conference	3977	BRYANT, LINDSAY	04/01/2022 04/04/2022	07/07/2022	\$2,183.50

1. Select the **Request 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



Pending Cost Object Approver



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.

Alerts: 1

Nashville, TN 4/1-4/4/22 \$2,163.50

LINDSAY BRYANT | Pending Cost Object Approval | Request ID: 3977

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓	Approved ↑↓
<input type="checkbox"/>	Hotel Reservation	Nashville, Tennessee	04/01/2022	\$1,500.00	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Conference Registration		04/01/2022	\$300.00	\$300.00	\$300.00
<input type="checkbox"/>	M&IE Rate	Nashville, Tennessee	04/01/2022	\$213.50	\$213.50	\$213.50
<input type="checkbox"/>	Transit Costs		04/01/2022	\$150.00	\$150.00	\$150.00
						\$2,163.50

In this scenario, you will need to click on the expand arrow to see more details about the exception.

Alerts: 1

REQUEST

This Request includes personal time. View



REQUEST HEADER

To access the Request Header, select the **Request Details** drop-down and click **Request Header**.

The Request Header 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.
NOTE: The state or traveler must be a dues-paying member of the national, state, or regional organization holding the event to qualify for In State Actual. The Certification of In State Travel Expenses Form must be attached to the Request and Expense Report for processing. This [form](#) can be found on the Comptroller’s website under Online Forms.
- Request Name** – The Report Name must be formatted as “Destination, Travel Dates”. As an example, “Atlanta, GA – 10/1-10/3/18”. The year must be included as part of the date.
NOTE: This is a required format that transfers to the Expense Report. The Expense Report will not be processed until this format is used.
- 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.*

Edit Request Header		
Nashville, TN 4/1-4/4/22 Request ID: 3977		
Request Policy	Request Name (Destination, Travel Dates)	Start Date * Required field
*AL-Out of State	Nashville, TN 4/1-4/4/22	04/01/2022
End Date	Will this include days of Personal Travel?	Dates of Personal Travel
04/04/2022	Yes	4/2/22
Department *	Accounting Group *	Accounting Template *
(010) FINANCE	(1242.917) Comptroller/Fiscal Mgmt	(UNCP01) COMPTROLLER
Purpose	Employee last name	Total Posted Amount
Conference	BRYANT, LINDSAY	3,483.50
Comment		



EXPECTED EXPENSES

The Expected Expenses area is a listing of all expenses requested for the travel event. *NOTE: Any major expenses not included on the Request will not be authorized for reimbursement on the Expense Report.*

Approvers should check behind the traveler to make sure all anticipated expenses are included in the Request and that estimated amounts appear to be reasonable. 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.

EXPECTED EXPENSES						
Add		Edit	Delete	Allocals		
<input type="checkbox"/> Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓	Approved ↑↓	
<input type="checkbox"/> Hotel Reservation	Nashville, Tennessee	04/01/2022	\$1,500.00	\$1,500.00	\$1,500.00	
<input type="checkbox"/> Conference Registration		04/01/2022	\$300.00	\$300.00	\$300.00	
<input type="checkbox"/> M&IE Rate	Nashville, Tennessee	04/01/2022	\$213.50	\$213.50	\$213.50	
<input type="checkbox"/> Transit Costs		04/01/2022	\$150.00	\$150.00	\$150.00	
<input type="checkbox"/> Air Ticket	Montgomery (MGM) - Nashville (BNA) : Round Trip	04/01/2022	\$950.00	\$950.00	\$950.00	
<input type="checkbox"/> Car Rental	Nashville, Tennessee - Nashville, Tennessee	04/01/2022	\$350.00	\$350.00	\$350.00	

Some of the most common expenses that should be selected are as follows:

- **M&IE Rate** – This will give the total allowable CONUS for the dates and location of the travel event.
- **Baggage Fees** – The state will reimburse baggage fees charged by commercial carriers based upon the duration of travel. For trips that last two nights/three days, the state will reimburse a traveler the actual cost for one checked bag. For trips that last three nights/four days to six nights/seven days, the state will reimburse a traveler the actual cost for two checked bags.
- **Air Ticket**
- **Hotel**
- **Rental Car**
- **Rental Car Fuel**
- **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.



AIR TICKET

The screenshot shows the SAP Concur 'Approvals' interface for an 'Air Ticket' request. The title bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The main content area is titled 'Air Ticket \$950.00' and features 'Cancel' and 'Save' buttons. The form is divided into 'Outbound' and 'Return' sections. The 'Outbound' section includes fields for 'From' (Dannelly Field (Airport - MGM), Montgomery, Alabama), 'To' (Nashville Metro (Airport - BNA), Nashville, Tennessee), 'Date' (04/01/2022), 'Depart at' (08:00 AM), and a 'Comment' field. The 'Return' section includes fields for 'Date' (04/04/2022), 'Depart at' (12:00 PM), and a 'Comment' field. At the bottom, there are fields for 'Amount' (950.00) and 'Currency' (US, Dollar). 'Save' and 'Cancel' buttons are located at the bottom right of the form.

The traveler will select either Round Trip, One Way or Multi Segment. Make sure correct dates and destination points are indicated based on the necessary selection.

- **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.
- **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.



HOTEL RESERVATION

The screenshot shows the SAP Concur interface for a Hotel Reservation. The title bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The main header displays 'Hotel Reservation \$1,500.00' with 'Cancel' and 'Save' buttons. The form fields are as follows:

Check-In		
Date	At	City
04/01/2022		Nashville, Tennessee
Detail		
Hilton		
Check-Out		
Date	At	
04/04/2022		
Comment		
Amount	Currency	
1,500.00	US, Dollar	

- **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 or based on pricing provided by the conference.



CAR RENTAL

The screenshot shows the SAP Concur 'Approvals' interface for a 'Car Rental' request. The header includes navigation tabs for 'Requests', 'Expense', 'Approvals', and 'App Center'. The main title is 'Car Rental \$350.00'. The form is divided into sections for 'Pick-up' and 'Drop-off'. Each section has fields for 'City', 'Date', and 'At'. The 'Pick-up' section has 'Nashville, Tennessee' in the City field and '04/01/2022' in the Date field. The 'Drop-off' section has 'Nashville, Tennessee' in the City field and '04/04/2022' in the Date field. There are 'Detail' fields for both sections. At the bottom, there is a 'Comment' field and an 'Amount' field set to '350.00' with a 'Currency' field set to 'US, Dollar'. Navigation buttons for 'Cancel' and 'Save' are present at the top right and bottom right.

- **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.
- **Amount** – This amount is an estimate gathered from a Google search.



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.

Approvals Home Requests

← → Conference Registration \$300.00 Cancel Save

04/01/2022

[Allocate](#)

Transaction Date: 04/01/2022 Description:

Transaction Amount: 300.00 Currency: US, Dollar Approved Amount*: 0.00

Comment: This conference has no charge for registering.

Save Cancel

Nashville, TN 4/1-4/4/22 \$3,463.50 More Actions Approve

LINDSAY BRYANT | Pending Cost Object Approval | Request ID: 3977

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓	Approved ↑↓
<input type="checkbox"/>		Hotel Reservation	Nashville, Tennessee	04/01/2022	\$1,500.00	\$1,500.00	\$1,500.00
<input type="checkbox"/>		Conference Registration		04/01/2022	\$300.00	\$300.00	\$0.00
<input type="checkbox"/>		<div style="border: 1px solid gray; padding: 2px;">Comment × This conference has no charge for registering. BAXTER, KATHLEEN 07/07/2022</div>		04/01/2022	\$213.50	\$213.50	\$213.50
<input type="checkbox"/>		Air Ticket	Montgomery (MGM) - Nashville (BNA) : Round Trip	04/01/2022	\$950.00	\$950.00	\$950.00
<input type="checkbox"/>		Car Rental	Nashville, Tennessee - Nashville, Tennessee	04/01/2022	\$350.00	\$350.00	\$350.00
							\$3,463.50



REQUEST TIMELINE (APPROVAL WORKFLOW)

The Request Timeline is used to identify where the Request is in the approval process.

Alerts: 1

Nashville, TN 4/1-4/4/22 \$3,463.50 More Actions Approve

LINDSAY BRYANT | Pending Cost Object Approval | Request ID: 3977

Request Details | Print/Share | Attachments

Request
Request Header
Request Timeline
Audit Trail

EXPENSES

Edit Delete Allocate

Expense type ↑↓ Details ↑↓ Date Amount ↑↓ Requested ↑↓ Approved ↑↓

Request Timeline

Nashville, TN 4/1-4/4/22 | \$3,463.50

Approval Flow

- Cost Object Approval
COMPTROLLER (010-1242.917-UNCP01)
BAXTER, KATHLEEN D.
- Cost Object Approval
COMPTROLLER (010-1242.917-UNCP01)
POOLE, WILLIAM S.

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 **More Actions** drop-down and clicking **Edit Approval Flow**.

Approvals Home Requests

Alerts: 1

Nashville, TN 4/1-4/4/22 \$3,463.50 More Actions Approve

LINDSAY BRYANT | Pending Cost Object Approval | Request ID: 3977

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Edit Approval Flow
Send Back to Employee

Select **Add Step**.

Edit Approval Flow

Cost Object Approval

+ Add Step

Cancel Save



A field will appear to search for an approver. The individual must have an approval role in Concur to be selected. Click **Save** after all additional desired levels have been added.

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**. Approvers also have authority to attach additional documentation as necessary.

Some of the attachments that should be provided for agency review:

- Conference agenda to verify dates and location of travel event.
- Certification of In State Travel Expenses Form if the employee is traveling under the In State Actual Travel Reimbursement Law.
- Details regarding personal time if a portion of the travel event consists of personal days, as indicated by the Request Header.



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.

Nashville, TN 4/1-4/4/22 \$3,463.50
LINDSAY BRYANT | Pending Cost Object Approval | Request ID: 3977
Request Details | Print/Share | Attachments
EXPECTED EXPENSES

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

Send Back to Employee

Comment History

Date/Time	Entered By	Comment
07/07/2022	KATHLEEN BAXTER	Add information about conference and personal time.

Add Comment

Reason for Sending Back the Request*

Add expense line for Baggage Fees.

Cancel Send Back