

**SAP Concur** 

# REQUEST APPROVER





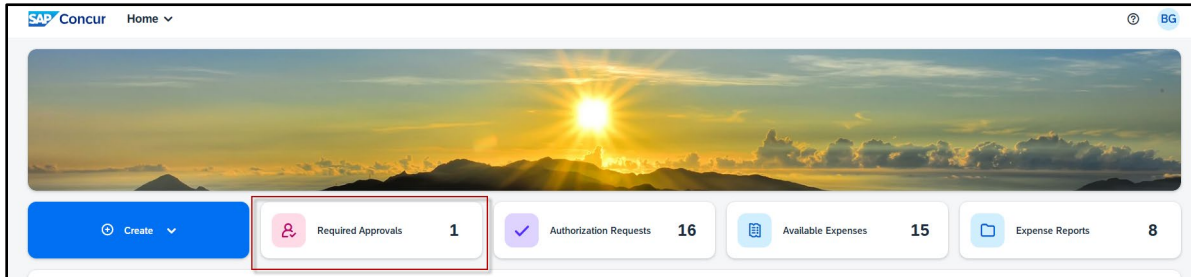
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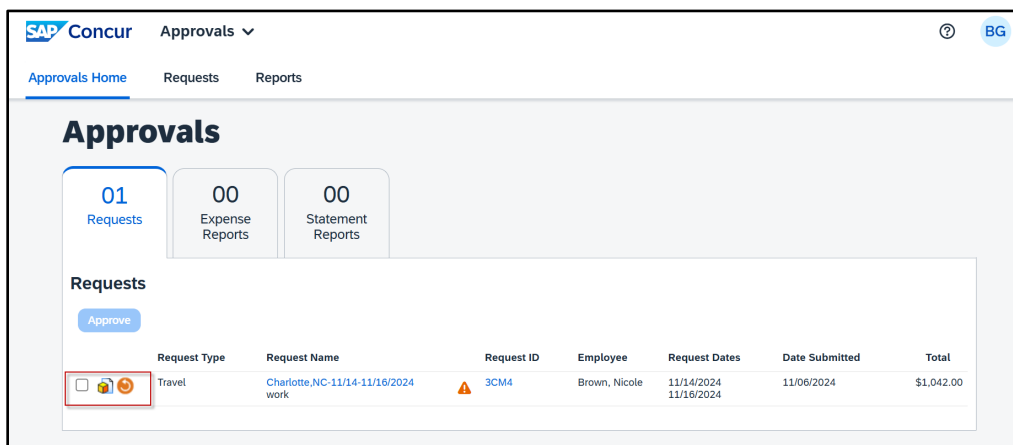
## HOME PAGE

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 **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. *Requests can be submitted with exceptions. Errors are what prevent requests from being submitted.*

Home / Approvals / Requests / Charlotte,NC-11/14-11/16/2024

Alerts: 1

**Charlotte,NC-11/14-11/16/2024 \$542.00** Approve Edit Approval Flow Approve & Forward Send Back to Employee

Nicole Brown | Pending Cost Object Approval | Request ID: 3CM4

Request Details | Print/Share | Attachments

EXPECTED EXPENSES Add Edit Delete Allocate

<input type="checkbox"/>	Alerts↑	Expense type↑	Details↑	Date↑	Amount↑	Requested↑
<input type="checkbox"/>		Transit Costs		11/14/2024	\$50.00	\$50.00
<input type="checkbox"/>		M&IE Rate	Charlotte, North Carolina, UNITED STATES	11/14/2024	\$140.00	\$140.00
<input type="checkbox"/>		Hotel Reservation	Charlotte, North Carolina	11/14/2024	\$252.00	\$252.00
<input type="checkbox"/>		Conference Registration		11/14/2024	\$100.00	\$100.00
						<b>\$542.00</b>

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

Home / Approvals / Requests / Charlotte,NC-11/14-11/16/2024

Alerts: 1 Expand Arrow

REQUEST

Alert 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.
- **Request Name** – The Report Name must be formatted as “Destination, Travel Dates”. As an example, “Atlanta, GA – 10/1-10/3/24”. 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. If the traveler is attending a conference, please notate in the purpose field. The purpose field will be visible to the auditors in the Comptroller’s Office.
- **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** ✕

Charlotte,NC-11/14-11/16/2024 | Request ID: 3CM4

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\* Required field

Request Policy *AL-Out of State	Request Name (Destination, Travel Dates) * Charlotte,NC-11/14-11/16/2024	Start Date * 11/14/2024
End Date * 11/16/2024	Will this include days of Personal Travel? Yes	Dates of Personal Travel 11/16/2024

---

Department * 1 (010) FINANCE ✕	Accounting Group * 2 (1242.917) Comptroller Fiscal Mgmt ✕	Accounting Template * 3 (UNCP01) COMPTROLLER ✕
Purpose 4/500 work	Employee last name * Brown, Nicole	Total Posted Amount * \$ 1,042.00

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Comment 48/500  
please include air ticket, car rental to request

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BRETT GANTT 11/06/2024

Cancel Save



# 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.

**Charlotte,NC-11/14-11/16/2024 \$542.00** Approve Edit Approval Flow Approve & Forward Send Back to Employee

Nicole Brown | Pending Cost Object Approval | Request ID: 3CM4

Request Details | Print/Share | Attachments

**EXPECTED EXPENSES** Add Edit Delete Allocate

<input type="checkbox"/>	Alerts↑↓	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>		Transit Costs		11/14/2024	\$50.00	\$50.00
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<input type="checkbox"/>		Hotel Reservation	Charlotte, North Carolina	11/14/2024	\$252.00	\$252.00
<input type="checkbox"/>		Conference Registration		11/14/2024	\$100.00	\$100.00
						<b>\$542.00</b>

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

Home / Approvals / Requests / Charlotte,NC-11/14-11/16/2024 / Air Ticket

[←](#) [→](#) **Air Ticket \$200.00** [Save](#) [Cancel](#)

**Outbound** \* Required field

From: Birmingham-Shuttlesworth International (Airport - BHM), Birmingham, Ala...  
To: Charlotte Douglas Intl (Airport - CLT), Charlotte, North Carolina

Date: 11/14/2024 Departure time: 09:00 AM  
Comment: 0/2000

**Return**

Date: 11/16/2024 Departure time: 11:00 AM  
Comment: 0/2000

Amount: 200.00 Currency: US, Dollar

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

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. The time entered is an estimate.
- **Return Date** – The date defaults to the travel End Date on the Request Header tab. The time is entered by the traveler. The time entered is an estimate.
- **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, to prevent errors when the expense report is created.



# HOTEL RESERVATION

Home / Approvals / Requests / Charlotte,NC-11/14-11/16/2024 / Hotel Reservation

**Hotel Reservation \$252.00**

\* Required field

**Check-In**

Date:  At:  City:

Detail:

**Check-Out**

Date:  At:

Comment:  0/2000

Amount:  Currency:

- **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

Home / Approvals / Requests / Charlotte,NC-11/14-11/16/2024 / Car Rental

← → **Car Rental \$300.00** Save Cancel

\* Required field

**Pick-up**

City: Charlotte, North Carolina Date: 11/14/2024 At:

Detail:

**Drop-off**

City: Charlotte, North Carolina Date: 11/16/2024 At:

Detail:

Comment:  0/2000

Amount: 300.00 Currency: US, Dollar

Save Cancel

- **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.



# REQUEST TIMELINE (APPROVAL WORKFLOW)

The Request Timeline is used to identify where the Request is in the approval process. This is done by selecting **Request Details** and then clicking **Request Timeline**.

Expense type	Details	Date	Amount	Requested
Air Ticket	Birmingham (BHM) - Charlotte (CLT) : Round Trip	11/14/2024	\$200.00	\$200.00

**Request Timeline**  
Charlotte, NC-11/14-11/16/2024 | \$1,042.00

**Approval Flow** [Edit]

- Cost Object Approval  
COMPTROLLER (010-1242.917-UNCP01)  
BRETT GANTT
- Cost Object Approval  
COMPTROLLER (010-1242.917-UNCP01)  
WILLIAM POOLE

An approver has the authority to add workflow to a specific Request if it needs to be reviewed by additional approvers. This is done by selecting the **Edit Approval Flow**.

Select **Add Step**.

**Edit Approval Flow**

Alerts: 1

This Request includes personal time.

Cost Object Approval

- COMPTROLLER (010-1242.917-UNCP01)  
GANTT, BRETT  
+ Add Substep
- COMPTROLLER (010-1242.917-UNCP01)  
POOLE, WILLIAM  
+ Add Substep

+ 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. This is done by selecting **Request Details**, then clicking **Audit Trail**.

## 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, as well as meals provided.
- 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.

**Charlotte, NC-11/14-11/16/2024 \$1,042.00**

Nicole Brown | Pending Cost Object Approval | Request ID: 3CM4

Request Details | Print/Share | Attachments (4)

EXPECTED EXPENSES

Buttons: Approve, Edit Approval Flow, Approve & Forward, Send Back to Employee

Buttons: Add, Edit, Delete, Allocate

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
11/06/2024	BRETT GANTT	please include air ticket, car rental to request
11/06/2024	BRETT GANTT	please include personal time

**Add Comment**

Reason for Sending Back the Request\*

Please attach Conference Agenda

Buttons: Cancel, Send Back