Approving Travel and Blanket Travel Requests

These instructions will cover how to approve two types of requests:

- Travel Request
- Blanket Travel Request

Requirements:

A Travel Request will be required if the traveler requests to go on a University business trip for more than 24 hours. You must identify estimated travel expenses that will be incurred throughout the trip. To ensure you comply with Travel policies, ask your budget coordinator to provide an amount that is allowed for your department to spend on your travel expenses.

A Blanket Travel Request will be required if the traveler requests to go on a business trip in California, within a fiscal year (June 31st – July 1st). Blanket Travel estimated expenses will only apply to parking, mileage, tolls, and approved business meals with official University guest.

At the end of the instructions, there are reminders on what to check as an approver for both Travel Request and Blanket Travel Request.

Table of Contents

Accessing Requests ................................................................................................................................. 2
Approving Options .................................................................................................................................. 5
  Approve .............................................................................................................................................. 6
  Approving and Forwarding .................................................................................................................... 7
  Send Back Request ............................................................................................................................... 10
Checklist ............................................................................................................................................... 11
Travel Request .................................................................................................................................... 11
Blanket Travel Request .......................................................................................................................... 12
## Accessing Requests

<table>
<thead>
<tr>
<th>Processing Step</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong> Log into Concur using the CSUF Portal. You will see your Concur dashboard, along with the number of approvals that are required to be approved by you as an Approver. Click on Required Approvals.</td>
<td><img src="image1.png" alt="Screen Shot 1" /></td>
</tr>
<tr>
<td><strong>Step 2:</strong> You will see three tabs: Trips, Requests, and Expense Reports. You will also see the number of approvals you need to approve for each tab. Select Requests.</td>
<td><img src="image2.png" alt="Screen Shot 2" /></td>
</tr>
</tbody>
</table>
### Processing Step |
| Screen Shots |

#### Step 3:
In the Requests tab, you will see requests that have been submitted to you for approval.

Click on the appropriate item.

In this example, **Jan 2018 Las Vegas, NV** was selected.

**Note:** Options to review Travel Request are the same as Blanket Travel Request.

#### Step 4:
You can approve multiple requests by checking on the boxes, and then click on Approve.

However, it is highly recommended for you to review each request individually.
**Step 5:**  
If you have a delegate set-up to preview requests, you will see a checkmark listed next to the requests indicating that it is ready for you to review.

![Image of Requests screen](image1.png)

**Step 6:**  
After you click on the request, you can review details by selecting each tab.

**Tip:** It is highly recommended to review all tabs with particular attention to: Request Header, Segments, and Expense Summary before approving the request.

![Image of SAP Concur screen](image2.png)
Approving Options

After reviewing all tabs, you will see three options for approval:

- **Approve**
- **Approve & Forward**
- **Send Back Request**

- The **Approve** button will approve the request, and move it on to the next approver or notify the employee of their eligibility to book for their travel.
  - If you do not need to add additional approvers, proceed to Step 7 to **Approve**.

- The **Approve & Forward** button will approve the request on your end, and will move forward to the next Approver that you will designate.
  - This option is best for situations where another department is paying for your employee to travel.
  - If you are the Approver for your employee, but another department is paying for your employee to travel, proceed to Step 8 to **Approve & Forward**.

- The **Send Back Request** button will send the request back to the user.
  - Select this option if the traveler needs to make corrections on the request.
  - If you are sending the request back, proceed to Step 9 to **Send Back Request**.
## Approve

<table>
<thead>
<tr>
<th>Processing Step</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 7:</strong> After you reviewed the employee’s request, select <strong>Approve</strong>.</td>
<td>![Image of Concur GUI showing Request 36LE with Approve button highlighted]</td>
</tr>
</tbody>
</table>

**Step 7a:** A confirmation window will pop-up, indicating the request has been approved.

Click on the X to exit the pop-up window once you are done approving or it will disappear after a few seconds.
## Approving and Forwarding

### Processing Step

| Step 8: | After you reviewed the employee’s request, select **Approve & Forward**.  
**Note:** The Approve & Forward button will be available in all tabs except Approval Flow. |

| Step 8a: | After you click on the **Approve & Forward**, you should see the page as shown on the right. |
**Processing Step** | **Screen Shots**
--- | ---

**Step 8b:**
Click in the **User-Added Approver** field, and another field will appear below.

The field below is where you can determine what category you would like to search by.

Click on the drop-down arrow by that field.

![Screen Shots](image1.png)

**Step 8c:**
In this step, **First Name** was selected.

Add the next approver under **User-Added Approver** by typing in their **First Name**.

![Screen Shots](image2.png)
<table>
<thead>
<tr>
<th>Processing Step</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 8d:</strong> When you are ready to approve the requests, select Approve.</td>
<td>![Screen Shots Image]</td>
</tr>
</tbody>
</table>
### Send Back Request

<table>
<thead>
<tr>
<th>Processing Step</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 9:</strong> Select Send Back Request button when there are red exceptions, such as:</td>
<td><img src="image1.png" alt="Send Back Request Screen Shot" /></td>
</tr>
<tr>
<td>- Receipts / attachments are not attached to certain expenses</td>
<td><img src="image2.png" alt="Send Back Request Screen Shot" /></td>
</tr>
<tr>
<td>- Wrong naming convention</td>
<td></td>
</tr>
<tr>
<td>- Estimated expenses not identified</td>
<td></td>
</tr>
<tr>
<td>- Estimated expense amount is unreasonable (comments need to be added)</td>
<td></td>
</tr>
<tr>
<td>- Incorrect dates</td>
<td></td>
</tr>
</tbody>
</table>

| Step 9a: Type in the reason you are sending the request back in the comment section. Then click OK. | ![Step 9a Screen Shot](image3.png) |

Add a comment to explain why you are returning the request. Then click OK to return the request to the employee.
Checklist
Now that you’ve learned how to approve both Travel and Blanket Travel Requests, keep in mind of the following when approving:

Travel Request

Reminder: This Travel Request is only required if the traveler requests to go on a University business trip for more than 24 hours.

You must identify estimated travel expenses that will be incurred throughout the trip. To ensure you comply with Travel policies, ask your budget coordinator to provide an amount that is allowed for your department to spend on your travel expenses.

☐ Correct Naming Convention
   – [Month] [Year] [Destination]
   – Example: SEP 2017 San Diego, CA

☐ Trip destination is clearly stated
☐ Personal Travel Details included (if applicable)
☐ Reviewed Header tab
   – Appropriate options were selected on all fields

☐ Reviewed Segments tab
   – Estimated amount was selected appropriately
   – Estimated amount is within department’s budget

☐ Reviewed Expenses tab
   – Estimated amount was selected appropriately
   – Estimated amount is within department’s budget

Ensure these estimated travel expenses have been added (if applicable to the traveler’s trip) and reviewed:

☐ Airfare
☐ Lodging
☐ Car Rental / Car Rental Gas
☐ Mileage
☐ Actual Per Day Meal Expense
☐ Actual Incidentals Per Day
☐ Registration Fee / Workshop
☐ Agenda or Program Flyer is attached for any conferences you attended
☐ Parking Fee, Tolls
☐ Taxi / Shuttle
Blanket Travel Request

Reminder: This Blanket Travel Request is only required if the traveler requests to go on a business trip less than 24 hours in California, within a fiscal year (June 31st – July 1st).

Blanket Travel estimated expenses will only apply to parking, mileage, tolls, and approved business meals with official University guest.

☐ Correct Naming Convention
  – Blanket Travel FY [Year-Year]
  – Example: Blanket Travel FY 2017-2018
☐ Trip destination is clearly stated
☐ Personal Travel Details included (if applicable)
☐ Reviewed Header tab
  – Appropriate options were selected on all fields
☐ Reviewed Segments tab
  – Estimated amount was selected appropriately
  – Estimated amount is within department’s budget
☐ Reviewed Expenses tab
  – Estimated amount was selected appropriately
  – Estimated amount is within department’s budget

Ensure at least one of these travel expenses have been added:
☐ Personal Car Mileage (make sure the mileage is within the distance allowed)
☐ Parking Fee
☐ Tolls
☐ Approved business meals with official University guest