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 (July 1st – June 30th). 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.
## Accessing Requests

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**Step 1:**
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**.

**Step 2:**
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**.
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.
**Processing Step** | **Screen Shots**
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**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.

![Request Preview](image1)

**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.

![Request Details](image2)
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

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<tr>
<td><strong>Step 7:</strong> After you reviewed the employee’s request, select <strong>Approve</strong>.</td>
<td><img src="image1.jpg" alt="Screen Shot" /></td>
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<tr>
<td><strong>Step 7a:</strong> A confirmation window will pop-up, indicating the request has been approved.</td>
<td><img src="image2.jpg" alt="Screen Shot" /></td>
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<tr>
<td>Click on the X to exit the pop-up window once you are done approving or it will disappear after a few seconds.</td>
<td><img src="image3.jpg" alt="Screen Shot" /></td>
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## Approving and Forwarding

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| **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

**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.

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

Add the next approver under **User-Added Approver** by typing in their **First Name**.
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<td><strong>Step 8d:</strong> When you are ready to approve the requests, select Approve.</td>
<td><img src="image" alt="Screen Shot" /></td>
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</table>

**Send Back Request**

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<tr>
<td><strong>Step 9:</strong> Select <strong>Send Back Request</strong> button when there are red exceptions, such as:</td>
<td><img src="image1" alt="Send Back Request Screen Shot" /></td>
</tr>
<tr>
<td>- Receipts / attachments are not attached to certain expenses</td>
<td></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>
<tr>
<td><strong>Step 9a:</strong> Type in the reason you are sending the request back in the comment section. Then click <strong>OK</strong>.</td>
<td><img src="image2" alt="Send Back Request Comment Screen Shot" /></td>
</tr>
</tbody>
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**Travel Request**

**Reminder:** A Travel Request will be required if the traveler travels domestically and within 48 states, except for Alaska & Hawaii. The traveler must identify estimated travel expenses that will be incurred throughout the trip.

**Approving Travel Request Checklist**

- Trip destination is clearly stated
- Reviewed Header tab
  - Appropriate options were selected on the following fields:
    - Request Policy— selected *State Approve then Book*
    - Request/Trip Name— correct naming convention
      - [Month] [Year] [Destination]
      - Example: SEP 2017 San Diego, CA
    - How will you book your travel?
    - Will hotel cost exceed $275 per night? — *Selecting Yes requires the traveler to enter a comment to explain why the hotel cost exceeds $275*
    - Trip Type
    - Start Date
    - End Date
    - Report/Trip Purpose
    - Traveler/User Type
    - Purpose
    - Main Destination City
    - State
    - Regions Traveling To
    - Does this trip contain personal travel? — *If yes, traveler must provide personal dates and location in the comment box*
    - Comment— include reasons of hotel cost exceeding $275, and personal dates and location *(if applicable)*
    - Division
    - Department ID
    - Fund
- 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
– Confirmed expense allocations are appropriate *(if applicable)*
  - **Note:** If an expense needs to be allocated, send the request back to the traveler and have the traveler refer to the Allocating Expenses Travel Request Instructions for more information

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

- [ ] Airfare/ Airline Fees (Baggage, Wifi, etc.)
- [ ] Lodging
- [ ] Car Rental / Car Rental Gas
- [ ] Mileage
- [ ] Actual Per Day Meal Expense
- [ ] Actual Incidentals Per Day
- [ ] Registration Fee / Workshop
- [ ] Registration form must be attached *(if applicable)*
- [ ] Parking Fee, Tolls
- [ ] Taxi / Shuttle
Blanket Travel Request

**Reminder:** A Blanket Travel Request will be required if the traveler requests to go on a business trip less than 24 hours in California, within a fiscal year (July 1st – June 30th). Blanket Travel estimated expenses will only apply to parking, mileage, tolls, and approved business meals with official University guest.

**Approving Blanket Travel Request Checklist**

- Trip destination is clearly stated
- Reviewed Header tab
  - Appropriate options were selected on the following fields:
    - Request Policy— selected *State Approve then Book*
    - Request/Trip Name— correct naming convention
      - Blanket Travel FY [Year-Year]
      - Example: Blanket Travel FY 2017-2018
    - How will you book your travel? — selected *Request for Offline/CTP Booking*
    - Will hotel cost exceed $275 per night? — selected *No*
    - Trip Type— selected *In-State*
    - Start Date— selected *July 1st, 2017 (use appropriate fiscal year)*
    - End Date— selected *June 30th, 2018 (use appropriate fiscal year)*
    - Report/Trip Purpose— selected *Blanket Travel (Mileage/Parking/Tolls)*
    - Traveler/User Type
    - Purpose— entered *Blanket Travel within California for FY17-FY18 (use appropriate fiscal year)*
    - Main Destination City— entered *Fullerton, California*
    - State— entered *California*
    - Main Destination Country— entered *United States*
    - Regions Traveling To
    - Division
    - Department ID
    - Fund

- Reviewed Expenses tab
  - Estimated amount was selected appropriately
  - Estimated amount is within department’s budget
  - Confirmed expense allocations are appropriate *(if applicable)*
    - **Note:** If an expense needs to be allocated, send the request back to the traveler and have the traveler refer to the Allocating Expenses Travel Request Instructions for more information
Selected applicable travel expenses:

- Personal Car Mileage (make sure the mileage is within the distance allowed)
- Parking Fee
- Tolls (excludes FastTrak, Fast Lane, or equivalent)
- Approved business meals with official University guest charged to a Procurement Card