

Workflow - Department Heads:
**Approving Travel
Requests**


Welcome to our training on approving travel requests in Concur.



This training is specific to department heads who will review travel requests to make sure the travel and its associated expected expenses are allowable within and appropriate to the department. Department head approval of the request indicates that it is correct and sanctioned at the department level.

 Alerts: 2 ▼

Europe Travel Request \$3,000.00

 Nick Test | Pending International Approval | Request ID: 336G

[More Actions](#) ▼ [Approve](#)

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

EXPECTED EXPENSES


[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type ^{↓↑}	Details ^{↓↑}	Date ^{↓↑}	Amount ^{↓↑}	Requested ^{↓↑}
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00

To begin approving a request, on the screen that shows the expected expenses,

 Alerts: 2 ▼

Europe Travel Request \$3,000.00

 Nick Test | Pending International Approval | Request ID: 336G

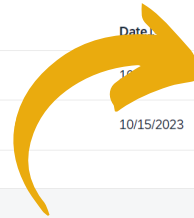
[More Actions](#) ▼ [Approve](#)

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)


<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00



You can view the expenses individually

 Alerts: 2 

Europe Travel Request \$3,000.00

 Nick Test | Pending International Approval | Request ID: 336G

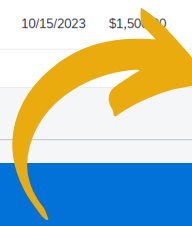
[More Actions ▾](#) [Approve](#)

[Request Details ▾](#) [Print/Share ▾](#) [Attachments ▾](#)

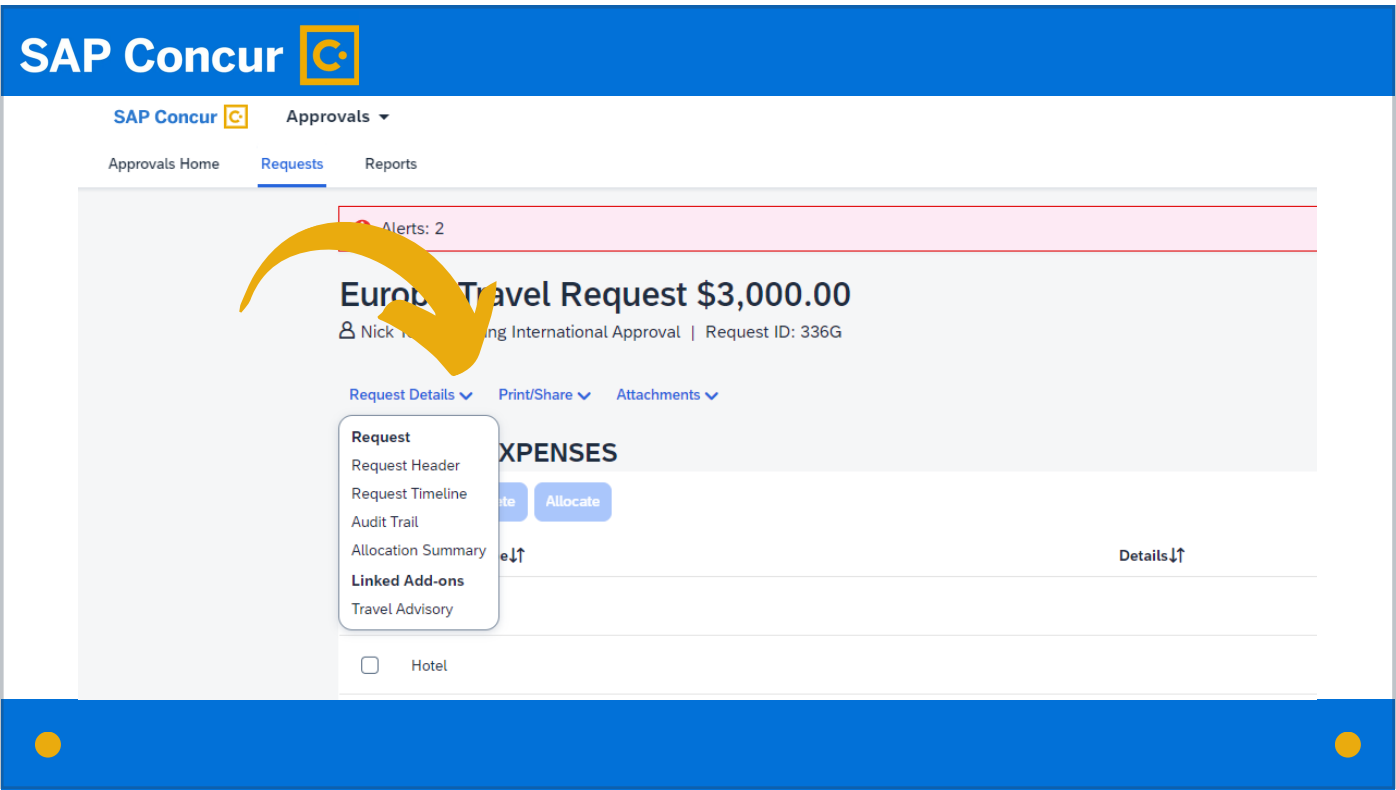
EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)


<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00



and in total.



Additional details are available under the Request Details dropdown menu.

 Alerts: 2

Europe Travel Request \$3,000.00

 Nick [Name] Pending International Approval | Request ID: 336G

Request Details ▾ Print/Share ▾ Attachments ▾

- Request
- Request Header
- Request Timeline**
- Audit Trail
- Allocation Summary
- Linked Add-ons
- Travel Advisory

EXPENSES

Hotel

For examples, the Request Timeline

The screenshot displays the SAP Concur 'Approvals' interface for a 'Europe Travel Request | \$3,000.00'. The interface is divided into two main sections: 'Approval Flow' and 'Request Summary'.

Approval Flow: A vertical timeline shows four steps:


- Travel Supervisor Approval:** Test Approver 1, Department Head (Completed)
- Business Liaison Approval:** Test, KSU Processor (Pending)
- Department Head Approval:** Test Department 1 (90001), Test, Nick (Completed)
- International Approval:** Test, Christa (Pending)

Request Summary: A list of system events:


- SUBMITTED:** Test, Nick 10/10/2023
- PENDING TRAVEL SUPERVISOR APPROVAL:** Test, Nick 10/10/2023
- APPROVED:** Test Approver 1, Department Head 10/10/2023
- APPROVED:** Test, KSU Processor 10/10/2023
- AUTO APPROVED:** Test, KSU Processor 10/10/2023
- APPROVED:** System, Concur 10/10/2023

The interface includes a 'Close' button in the bottom right corner and a blue header with the SAP Concur logo.

provides the approval workflow information,

 Alerts: 2

Europe Travel Request \$3,000.00

 Nick T... Requesting International Approval | Request ID: 336G

Request Details ▾ Print/Share ▾ Attachments ▾

Request

Request Header

Request Timeline

Audit Trail

Allocation Summary


Linked Add-ons

Travel Advisory

EXPENSES

Hotel

and the Allocation Summary

SAP Concur  Approvals ▼

Approvals Home **Requests** Reports

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/> Expense type ↑↓	Details ↓↑	Date ↓↑	Amount ↓↑	Requested ↓↑
<input type="checkbox"/> Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

Europe Travel Request | \$3,000.00

The sum of allocation amounts may not exactly match the expense amount due to rounding.

Code ↓↑	Amount ↓↑
90001-90001-NKSUDFAULT-90001-NKSUDFAULT-20110-90001-NKSUDFAULT-20110-NOAWRD-90001-NKSUDFAULT-20110-NOAWRD-2080	\$3,000.00
Test Department 1 - Default Project - Default PCA - Default Award - Default Funding for Department 1	00

[Close](#)

[More Actions](#) ▼ [Approve](#)

allows you to see the fund sourcing for the request.

SAP Concur

SAP Concur | Approvals Home | Reports

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

More Actions | Approve

Request Details | Print/Share | Attachments

EXPENSES

Request Header | Request Timeline | Audit Trail | Allocation Summary | Linked Add-ons | Travel Advisory

	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel	10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

Alerts regarding the request are noted near the top of the screen.

SAP Concur

SAP Concur Approvals

Approvals Home **Requests** Reports

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

More Actions Approve

Request Details Print/Share Attachments

Request

Request Header

Request Timeline

Audit Trail

Allocation Summary

Linked Add-ons

Travel Advisory

EXPENSES

Allocate

	Details	Date	Amount	Requested
		10/15/2023	\$1,500.00	\$1,500.00
		10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

Hotel

Click on the alerts dropdown menu at the far right to view the alerts and determine if action is needed to resolve them.

SAP Concur

SAP Concur Approvals

Approvals Home Requests Reports

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

More Actions Approve

Request Details Print/Share Attachments

Request

Request Header

Request Timeline

Audit Trail

Allocation Summary

Linked Add-ons

Travel Advisory

EXPENSES

Allocate

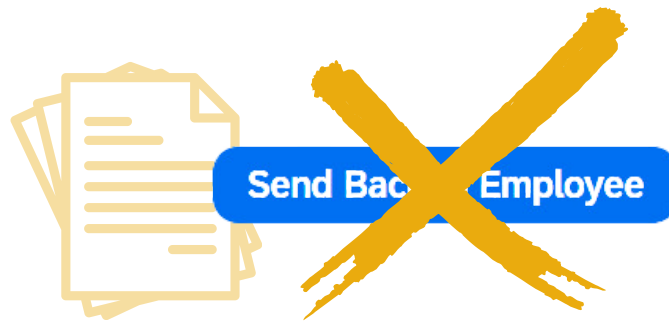
	Details	Date	Amount	Requested
		10/15/2023	\$1,500.00	\$1,500.00
		10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

Hotel

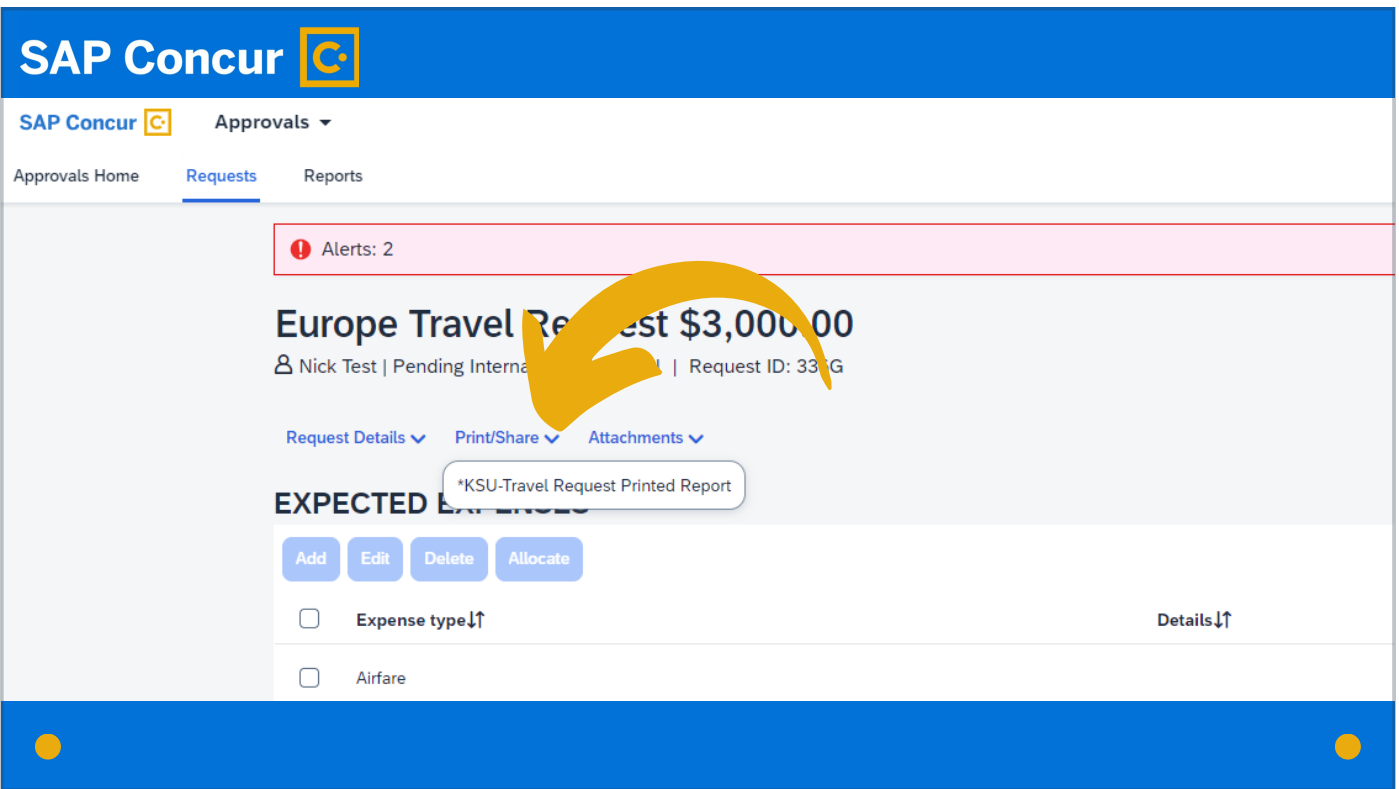
Once you have reviewed all aspects of the report, you have the options to approve it or send it back to the employee.



Important!



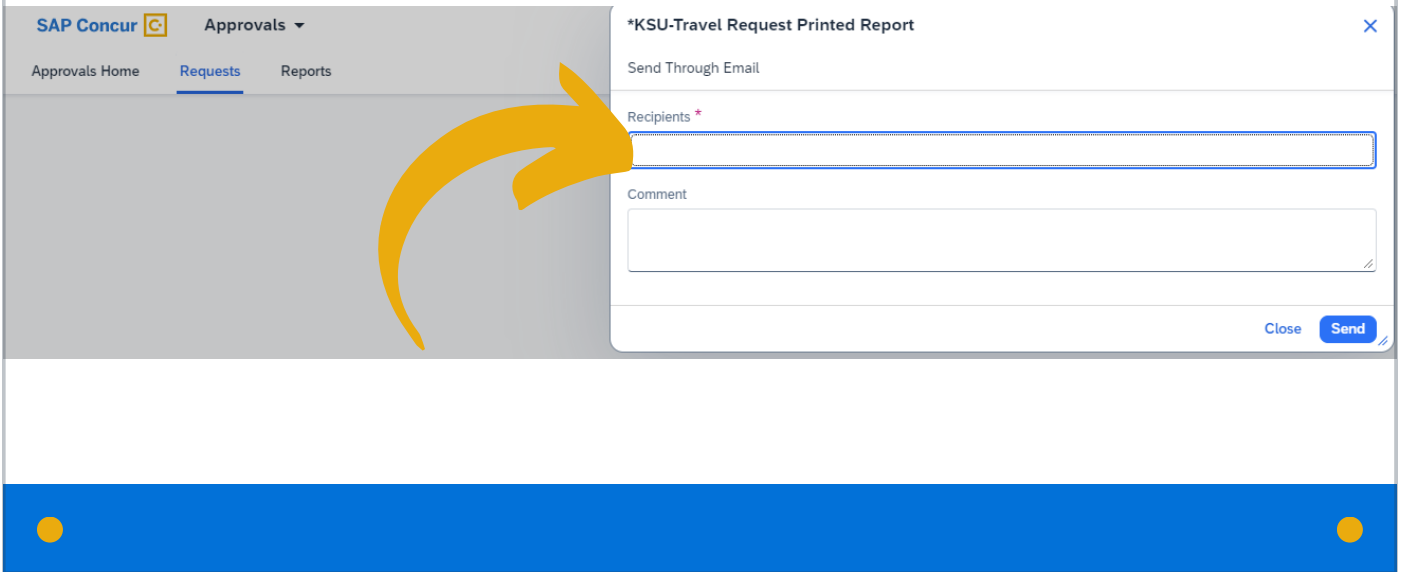
If the reason you cannot approve the request is that required documentation or a clarifying comment is needed, it is better to email the employee to ask them to attach the documentation or add the comment. Documentation and comments can be appended to a request at any time, but if the request gets sent back to the employee at any point in the approval workflow process, the entire workflow must start over.



To email the employee, click the Print/Share dropdown menu and select KSU Travel Request Printed Report.

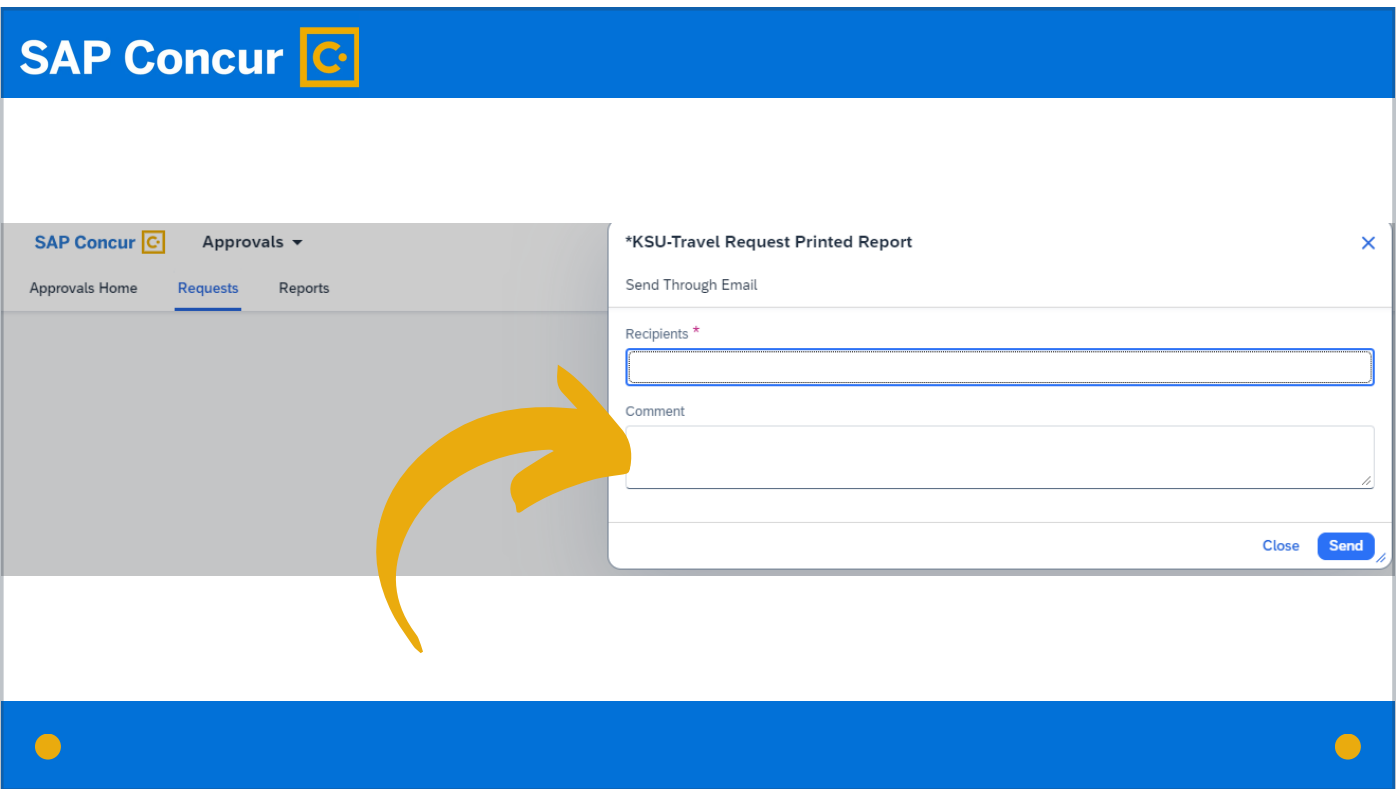
The screenshot displays the SAP Concur 'Approvals' interface. A report window titled 'Booking Business Travel' is open, showing details for Request ID 336G, which is in a 'Pending International Approval' status. The window includes a 'List of Request Exceptions' section with a message: 'One or more Cost objects could not be approved by the right authority (%costObjects%). The request has been moved to the next workflow step. Request requires International Approval.' Below this, employee and manager information is listed, including 'Test, Nick' as the employee and 'Test Approver 1, Department Head' as the manager. At the bottom of the report window, there are buttons for 'Close', 'Print', 'Save as PDF', and 'Email'. A large yellow arrow points to the 'Email' button. The background shows the SAP Concur navigation menu with 'Approvals Home', 'Requests', and 'Reports' options.

When the report window opens, click the Email button in the bottom right corner of that window.




The screenshot shows the SAP Concur interface. At the top, there is a blue header with the SAP Concur logo. Below the header, there is a navigation bar with 'Approvals' and a dropdown arrow. Under 'Approvals', there are three tabs: 'Approvals Home', 'Requests', and 'Reports'. The 'Requests' tab is active. A modal window titled '*KSU-Travel Request Printed Report' is open. The modal has a close button (X) in the top right corner. Below the title, there is a section labeled 'Send Through Email'. Under this section, there is a 'Recipients *' field, which is a text input field. A yellow arrow points to this field. Below the 'Recipients' field, there is a 'Comment' field, which is a text area. At the bottom right of the modal, there are two buttons: 'Close' and 'Send'.

Enter the email address of the employee,



and add a comment explaining what needs to be appended.

SAP Concur  Approvals ▾

Approvals Home Requests Reports


***KSU-Travel Request Printed Report** ✕

Send Through Email

Recipients *

Comment

Send



Then click Send.

SAP Concur Approvals

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00

More Actions | Approve

- Edit Approval Flow
- Approve & Forward
- Send Back to Employee

If something other than missing documentation or comment clarification is the reason the report cannot be approved and it is necessary for the report to be sent back to the employee, click the More Actions dropdown menu and the Send Back to Employee option.

The screenshot displays the SAP Concur interface for a travel request. At the top, the SAP Concur logo is visible. Below it, there are navigation tabs for 'Approvals Home', 'Requests', and 'Reports'. A notification bar shows 'Alerts: 2'. The main heading is 'Europe Travel Request \$3,000.00' by 'Nick Test', with a status of 'Pending International Approval'. A modal window titled 'Add Comment' is open, with a 'Reason for Sending Back the Request*' field highlighted by a yellow arrow. Below the modal, there is a table of 'EXPECTED EXPENSES' with columns for 'Expense type', 'Date', 'Amount', and 'Requested'. The table lists 'Airfare' and 'Hotel' expenses, each for \$1,500.00, totaling \$3,000.00.

Expense type	Date	Amount	Requested
<input type="checkbox"/> Airfare	10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel	10/15/2023	\$1,500.00	\$1,500.00
			\$3,000.00

In the comments box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.

The screenshot displays the SAP Concur interface for a travel request. At the top, the SAP Concur logo is visible. Below the header, there are navigation tabs for 'Approvals Home', 'Requests', and 'Reports'. A notification bar indicates 'Alerts: 2'. The main heading is 'Europe Travel Request \$3,000.00', with a sub-heading 'Nick Test | Pending International Approval | Request ID: 336G'. To the right of the heading are 'More Actions' and 'Approve' buttons. Below this, there are options for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section includes buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A table lists the expenses:

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/> Hotel		10/15/2023	\$1,500.00	\$1,500.00
				\$3,000.00

If the report is good to be approved, you can either click the Approve button

SAP Concur Approvals

Alerts: 2

Europe Travel Request \$3,000.00

Nick Test | Pending International Approval | Request ID: 336G

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

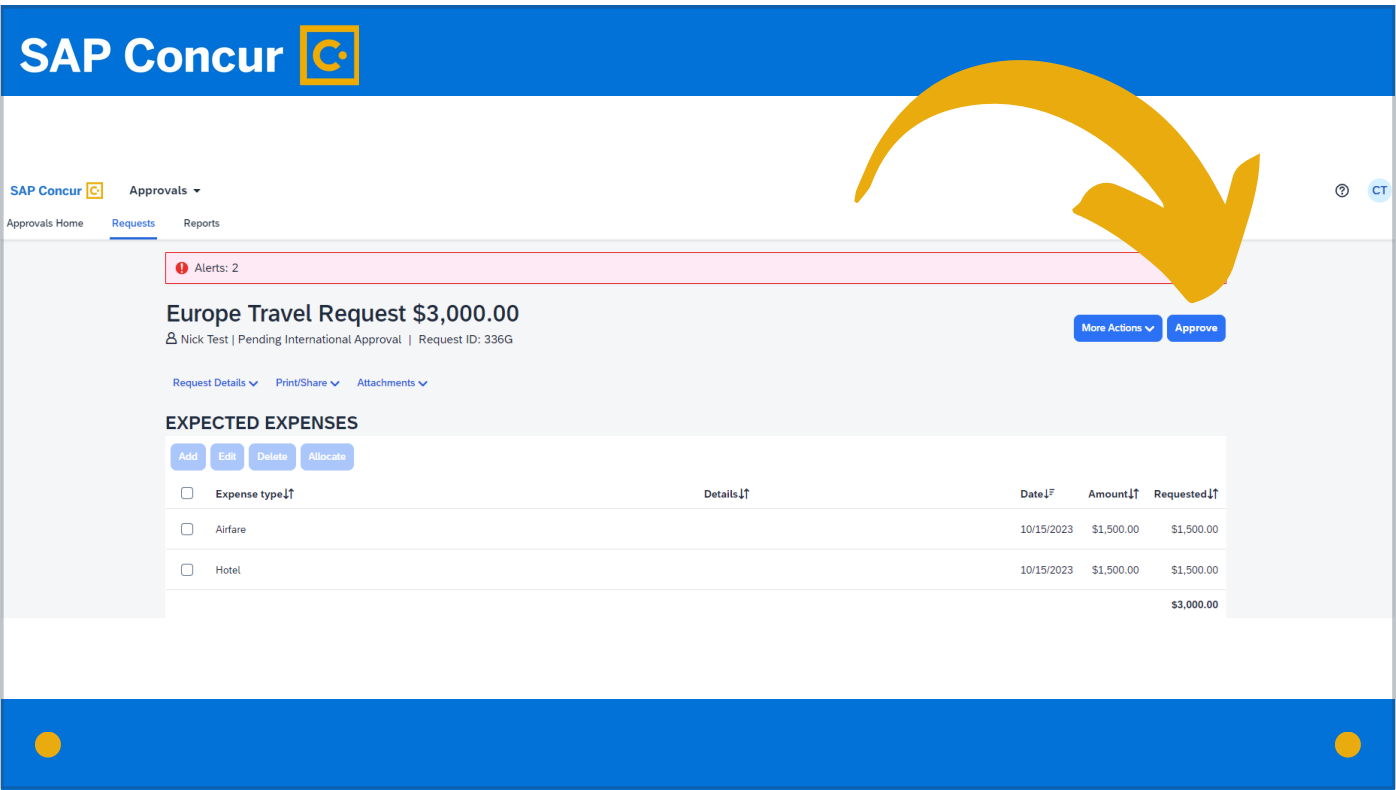
Add Edit Delete Allocate

<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Airfare		10/15/2023	\$1,500.00	\$1,500.00
<input type="checkbox"/>	Hotel		10/15/2023	\$1,500.00	\$1,500.00
					\$3,000.00

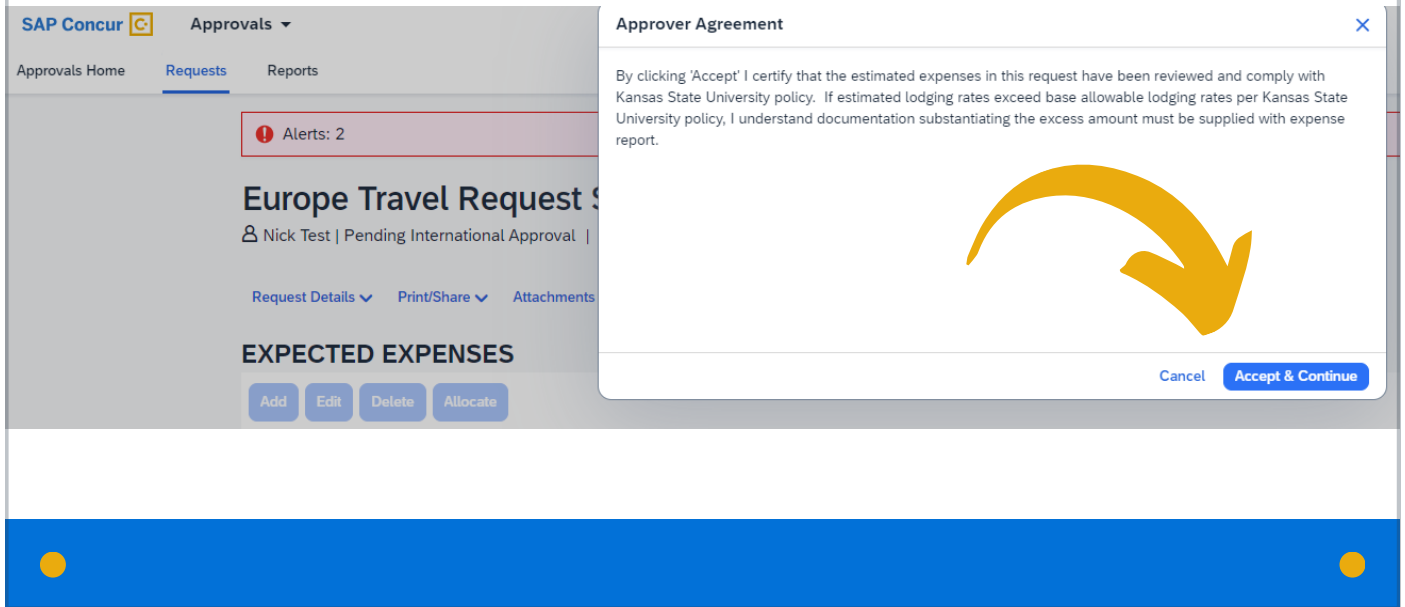
More Actions | Approve

- Edit Approval Flow
- Approve & Forward
- Send Back to Employee

or, if you need to insert an additional approver into the approval workflow, you can do that at this point by clicking the More Actions dropdown menu and selecting Approve and Forward. For more details on this process, please refer to our Adding an Approver to the Request Workflow training video.



Once you click Approve,



The screenshot displays the SAP Concur interface. On the left, a sidebar shows the 'Approvals' menu with 'Requests' selected. The main content area shows a 'Europe Travel Request' by 'Nick Test' in a 'Pending International Approval' state. Below this, there is a section for 'EXPECTED EXPENSES' with buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. An 'Approver Agreement' modal is open on the right, containing the following text: 'By clicking 'Accept' I certify that the estimated expenses in this request have been reviewed and comply with Kansas State University policy. If estimated lodging rates exceed base allowable lodging rates per Kansas State University policy, I understand documentation substantiating the excess amount must be supplied with expense report.' A large yellow arrow points from the text to the 'Accept & Continue' button at the bottom right of the modal. The modal also includes a 'Cancel' button.

read the Approver Agreement that comes up to make certain you agree to it. As long as you do agree, click the Accept & Continue button. Your part in the approval process is now complete.