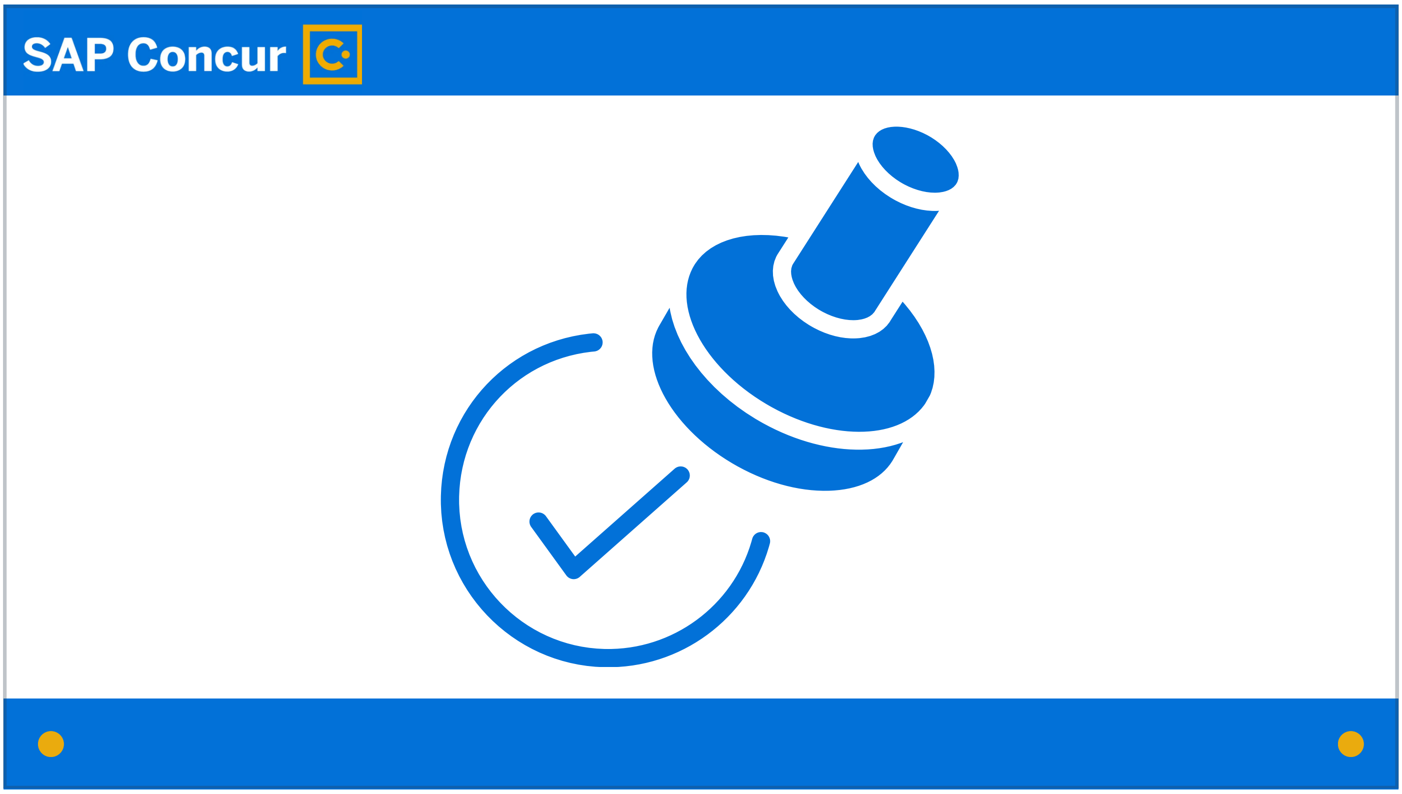
SAP Concur

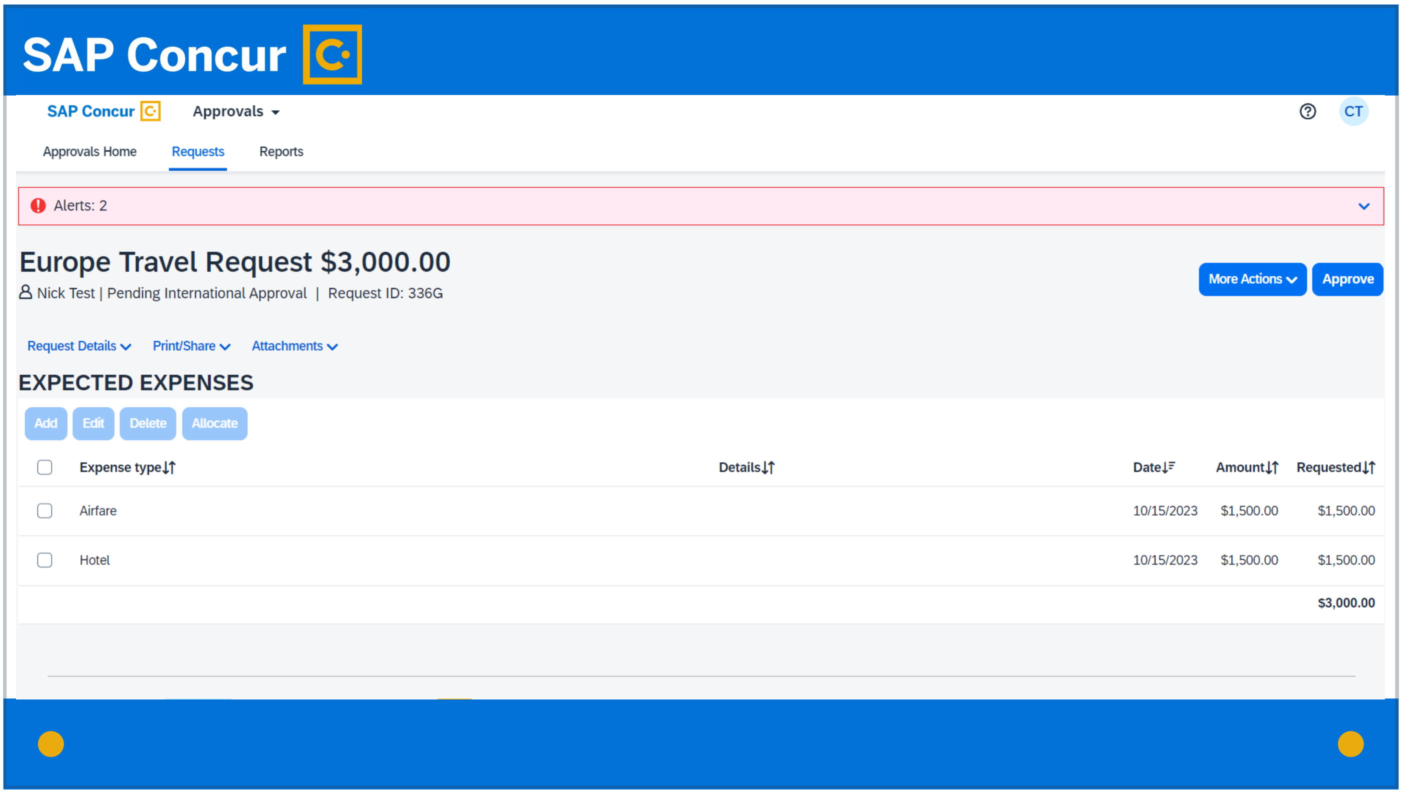
Workflow - Department Heads:

Approving Travel Requests

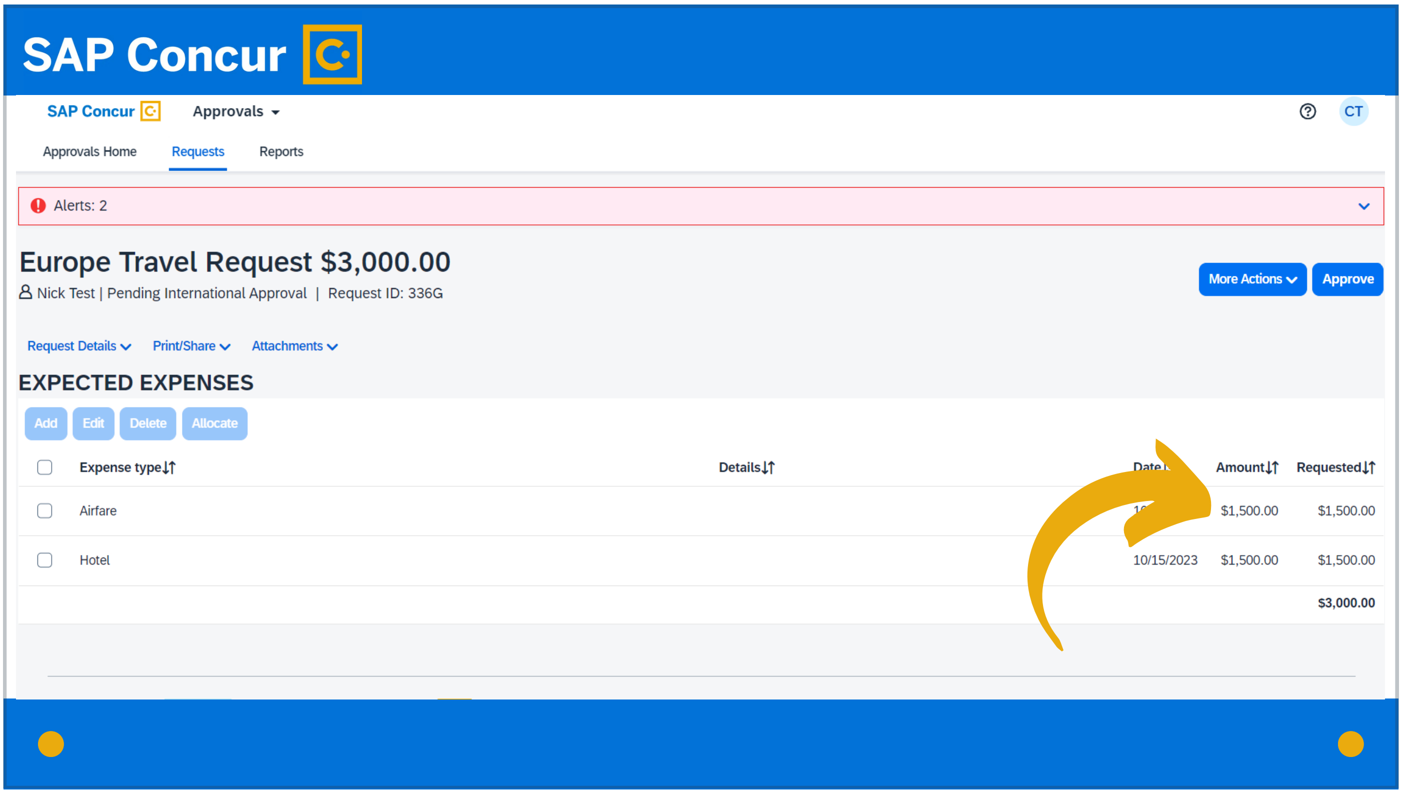
Welcome to our training on approving travel requests in Concur.



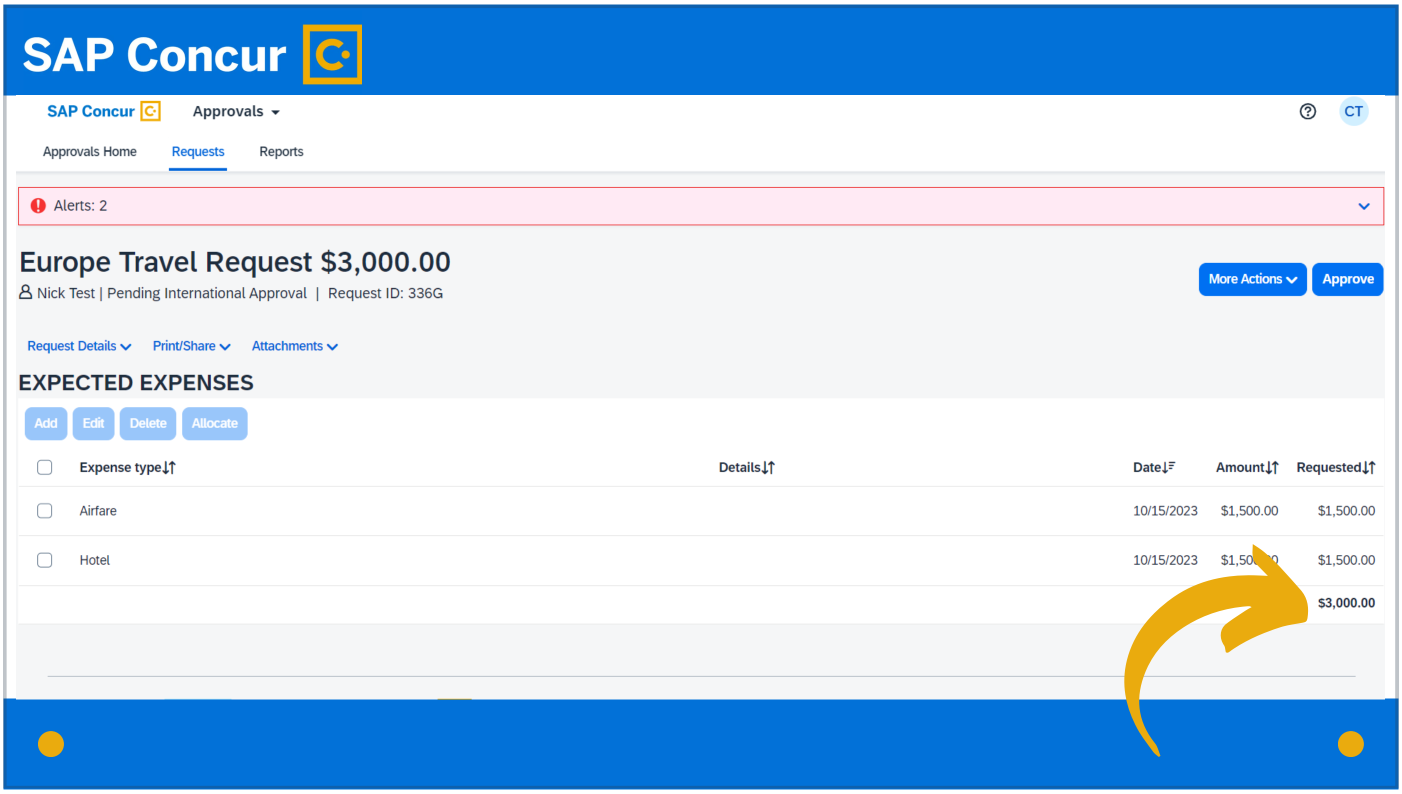
This training is specific to department heads who will review travel requests to make sure the travel and its associated expected expenses are allowable within and appropriate to the department. Department head approval of the request indicates that it is correct and sanctioned at the department level.



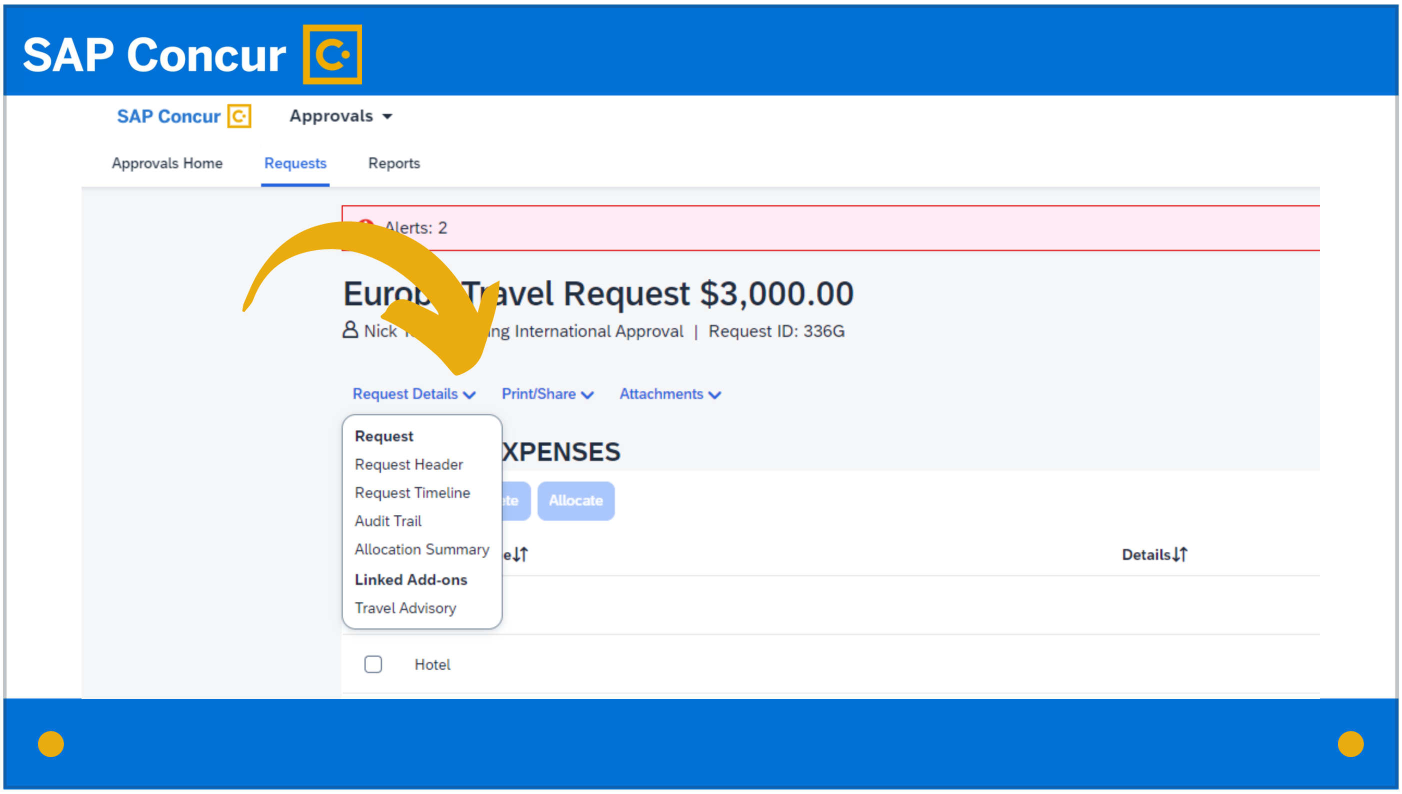
To begin approving a request, on the screen that shows the expected expenses,



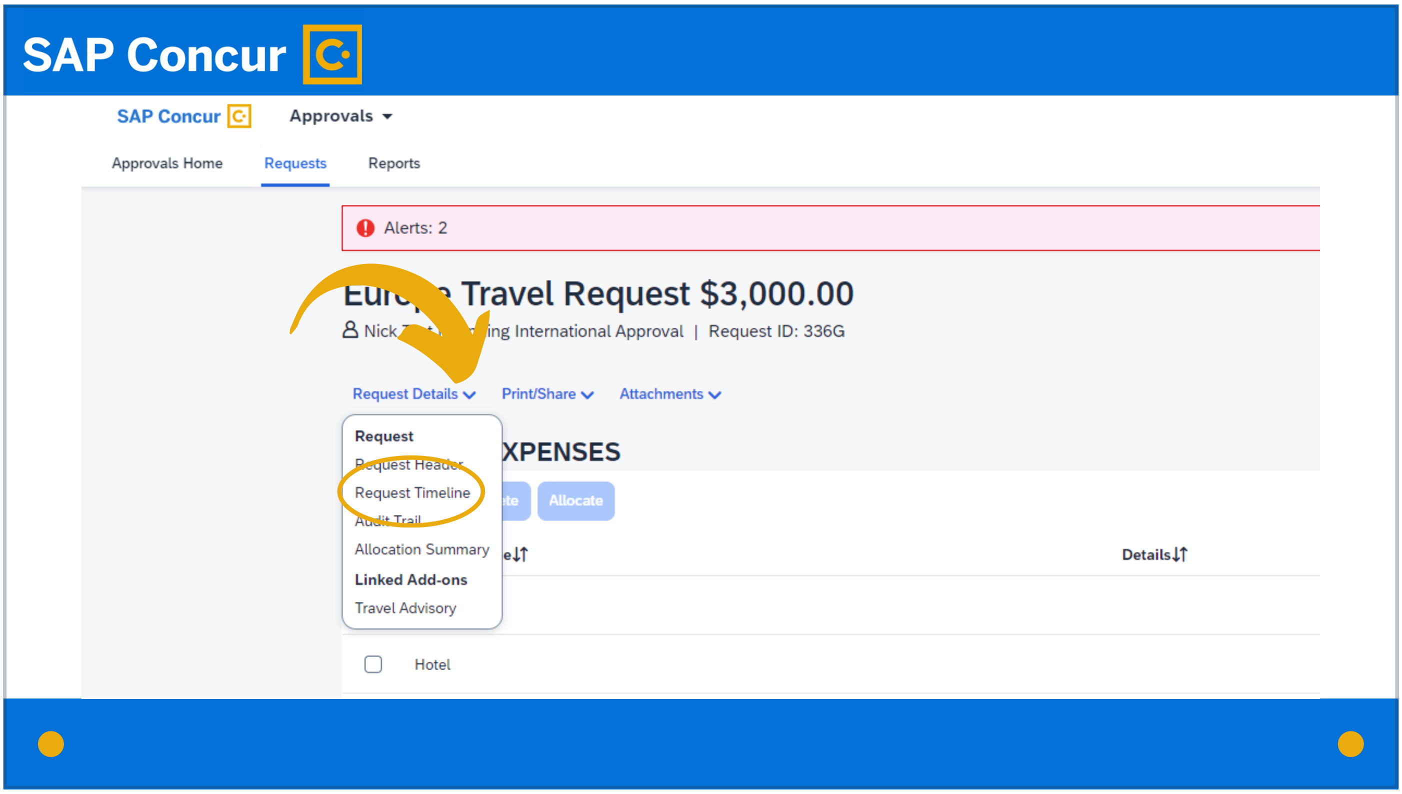
You can view the expenses individually


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
EXPECTED EXPENSES
Add
Edit
Delete
Allocate
Expense type
Details
Date
Amount
Requested
Airfare
10/15/2023
$1,500.00
$1,500.00
Hotel
10/15/2023
$1,500.00
$3,000.00

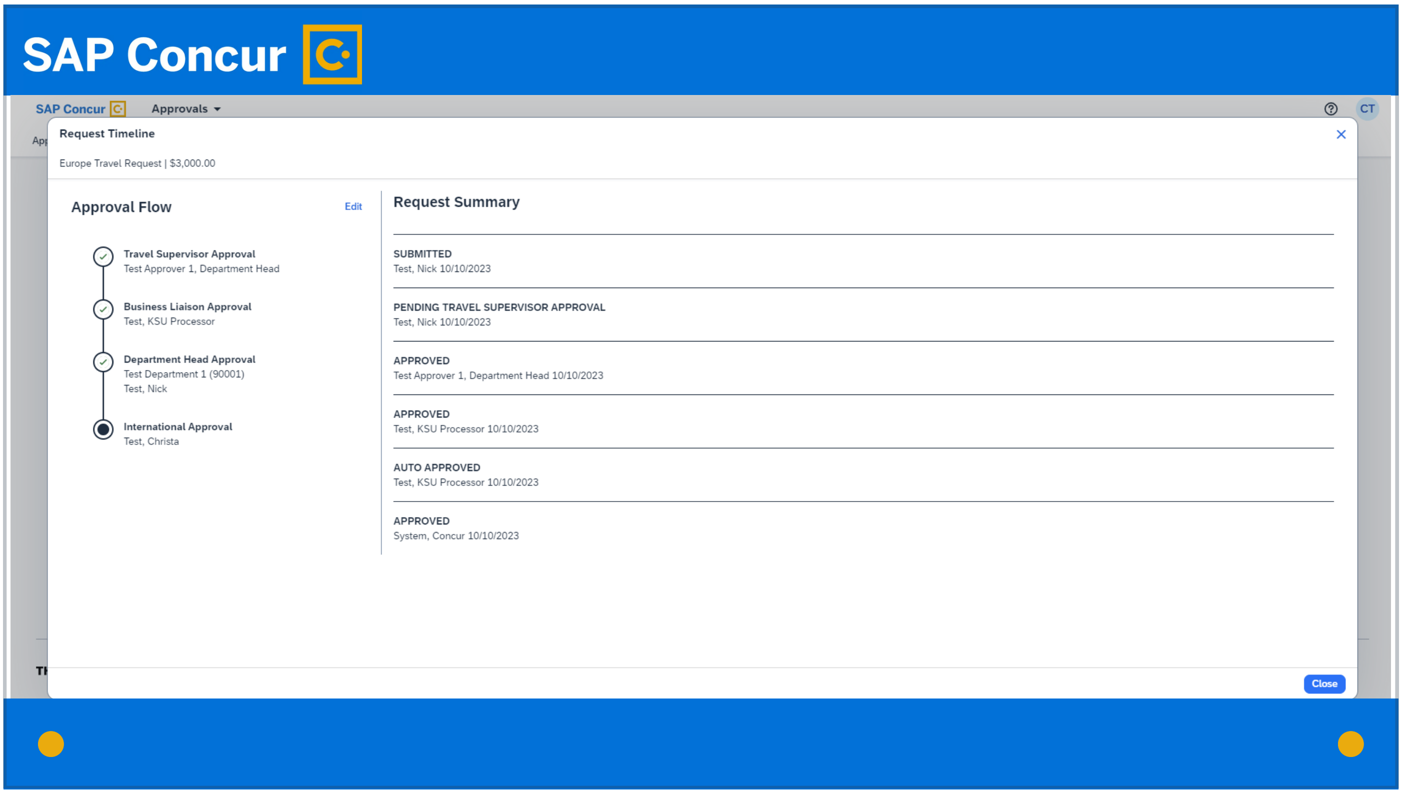
and in total.



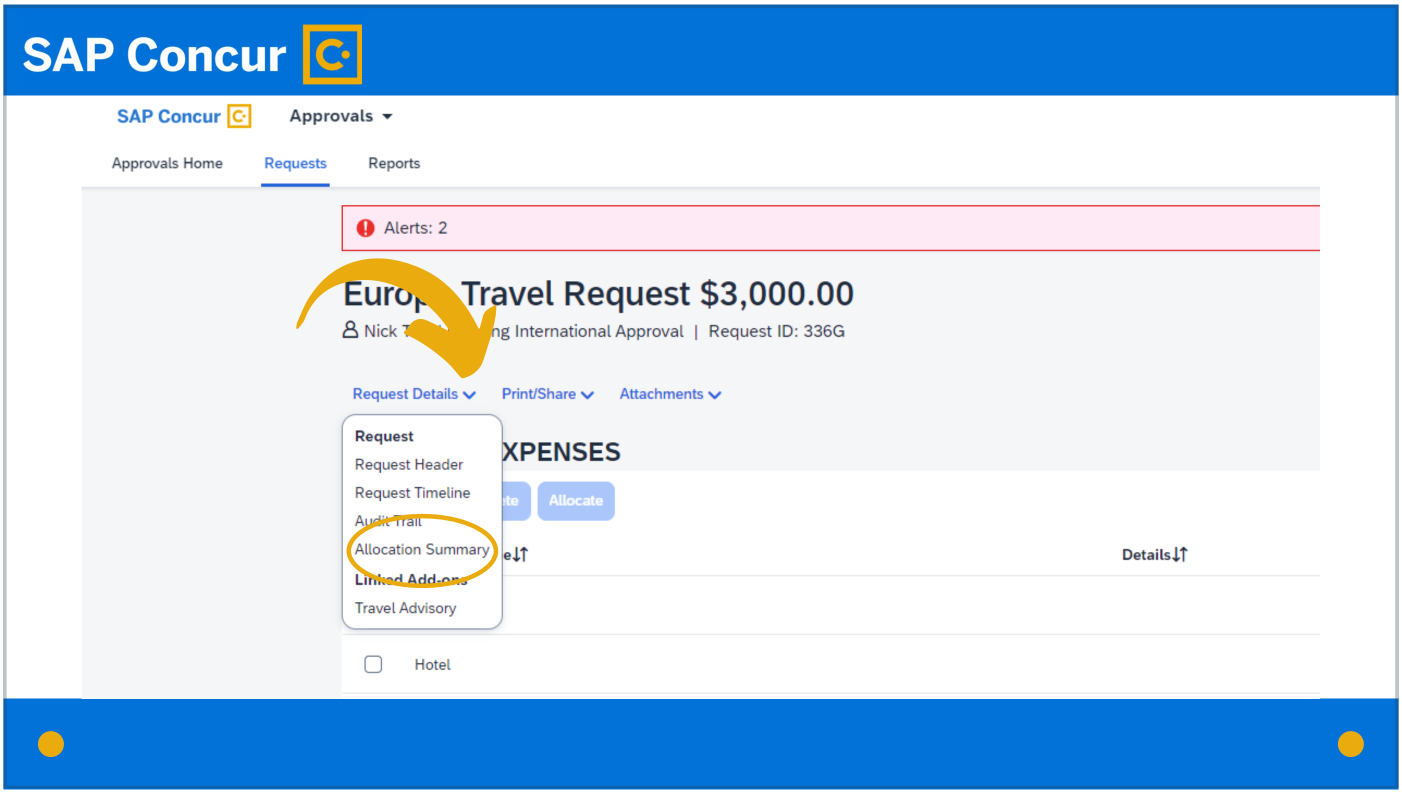
Additional details are available under the Request Details dropdown menu.



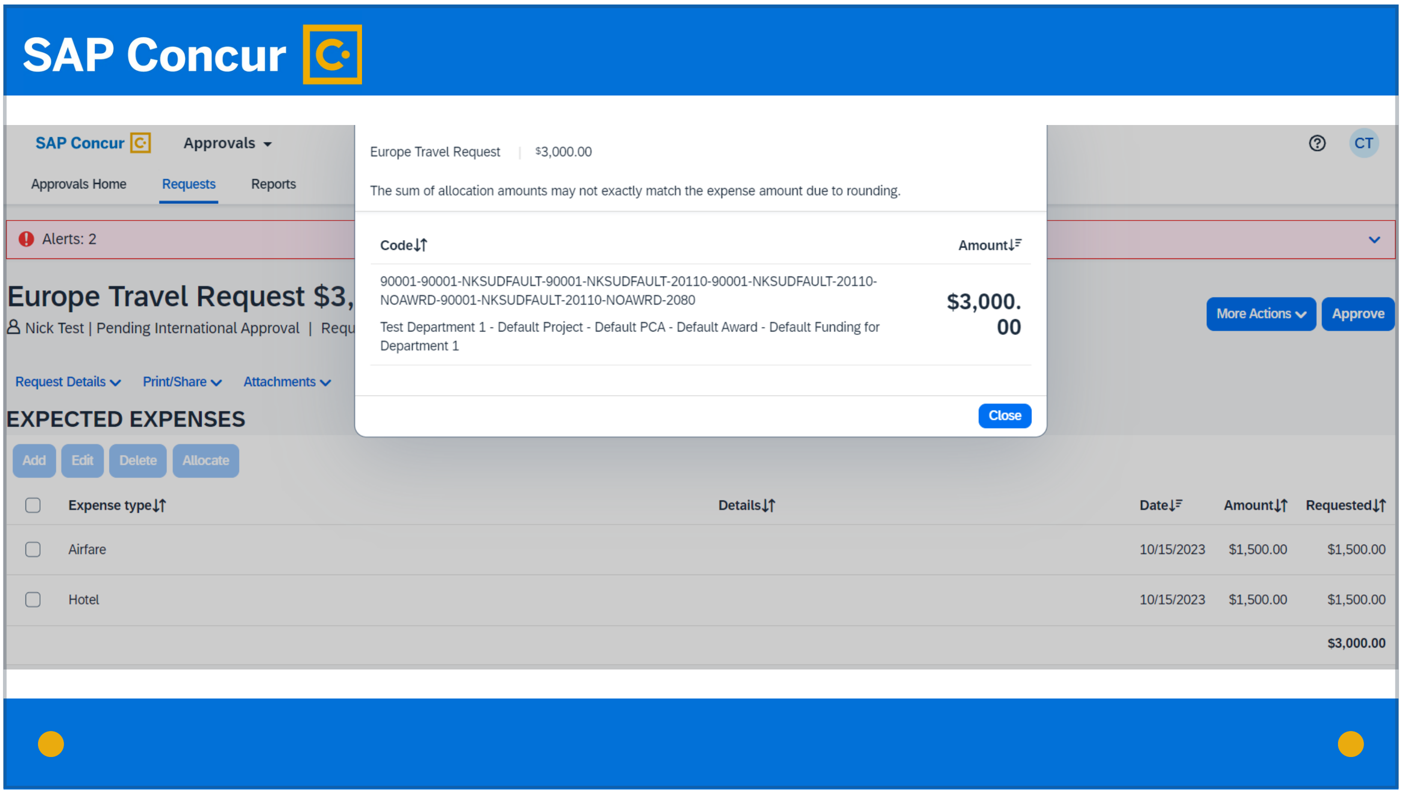
For examples, the Request Timeline



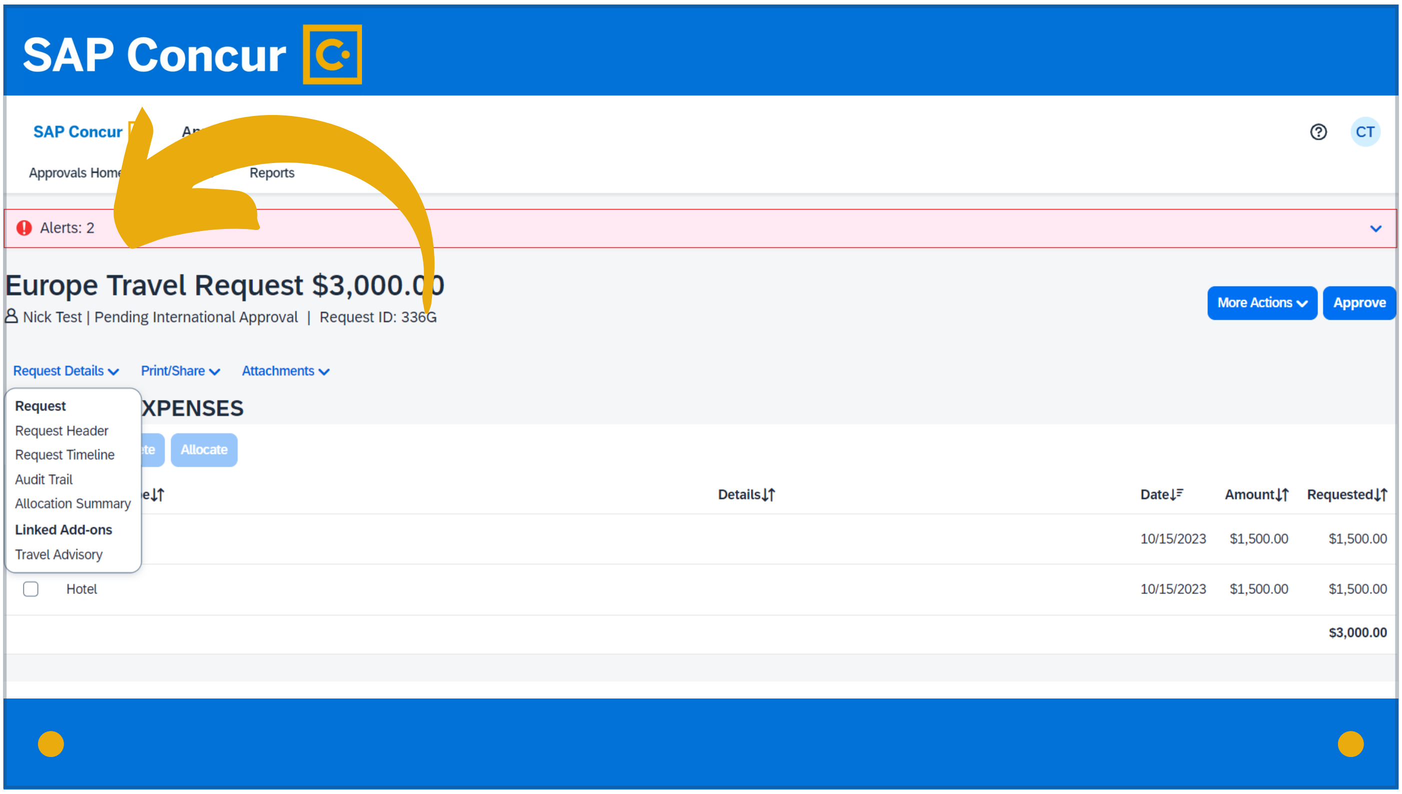
provides the approval workflow information,



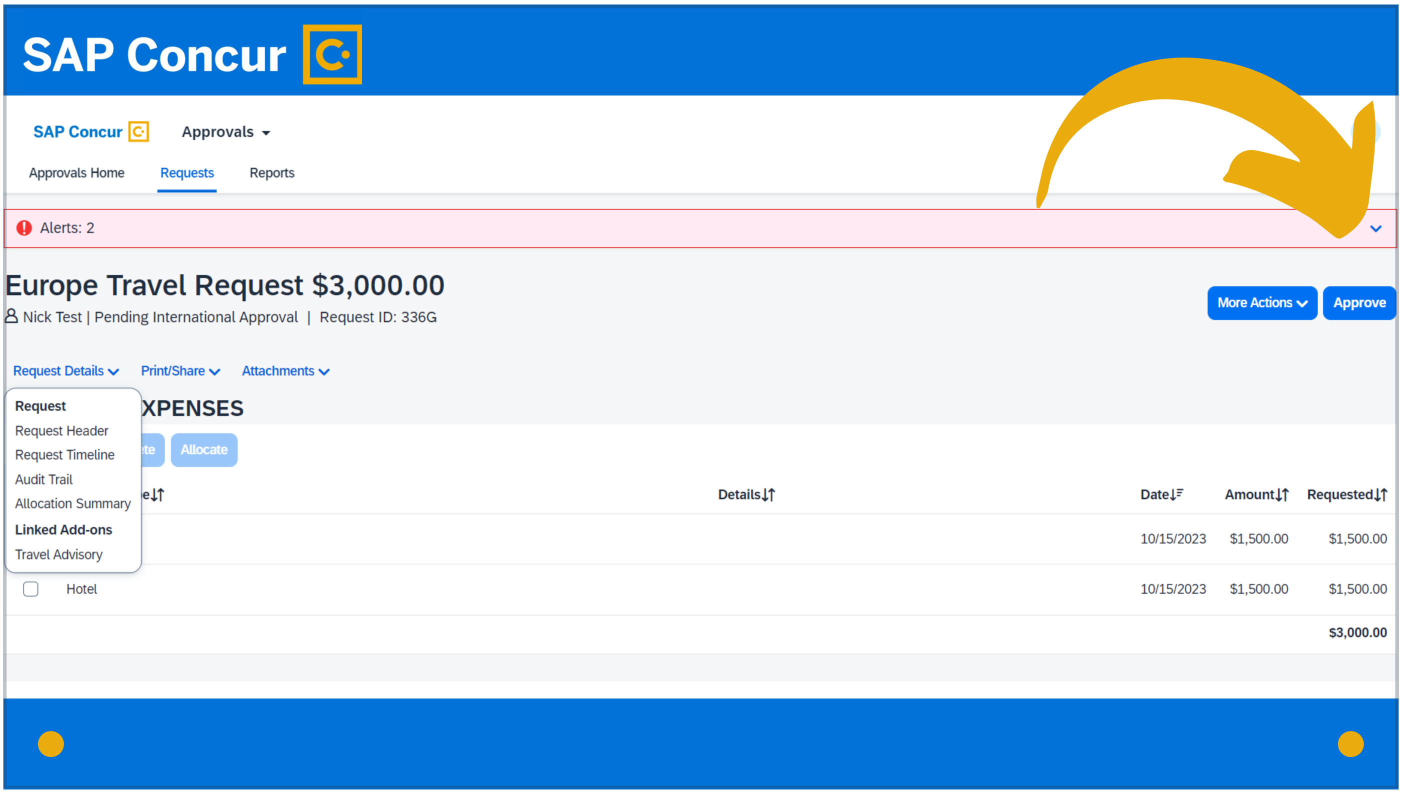
and the Allocation Summary



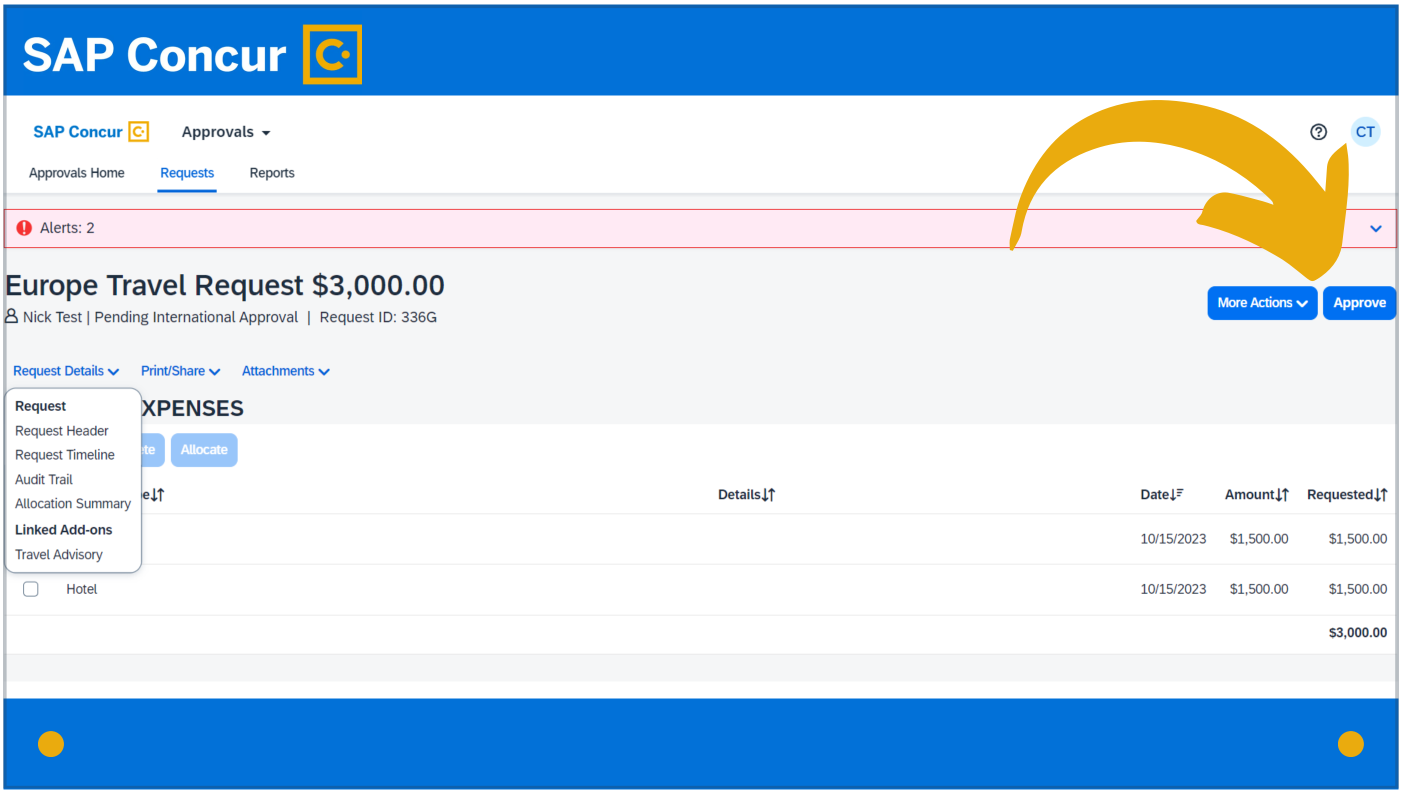
allows you to see the fund sourcing for the request.



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

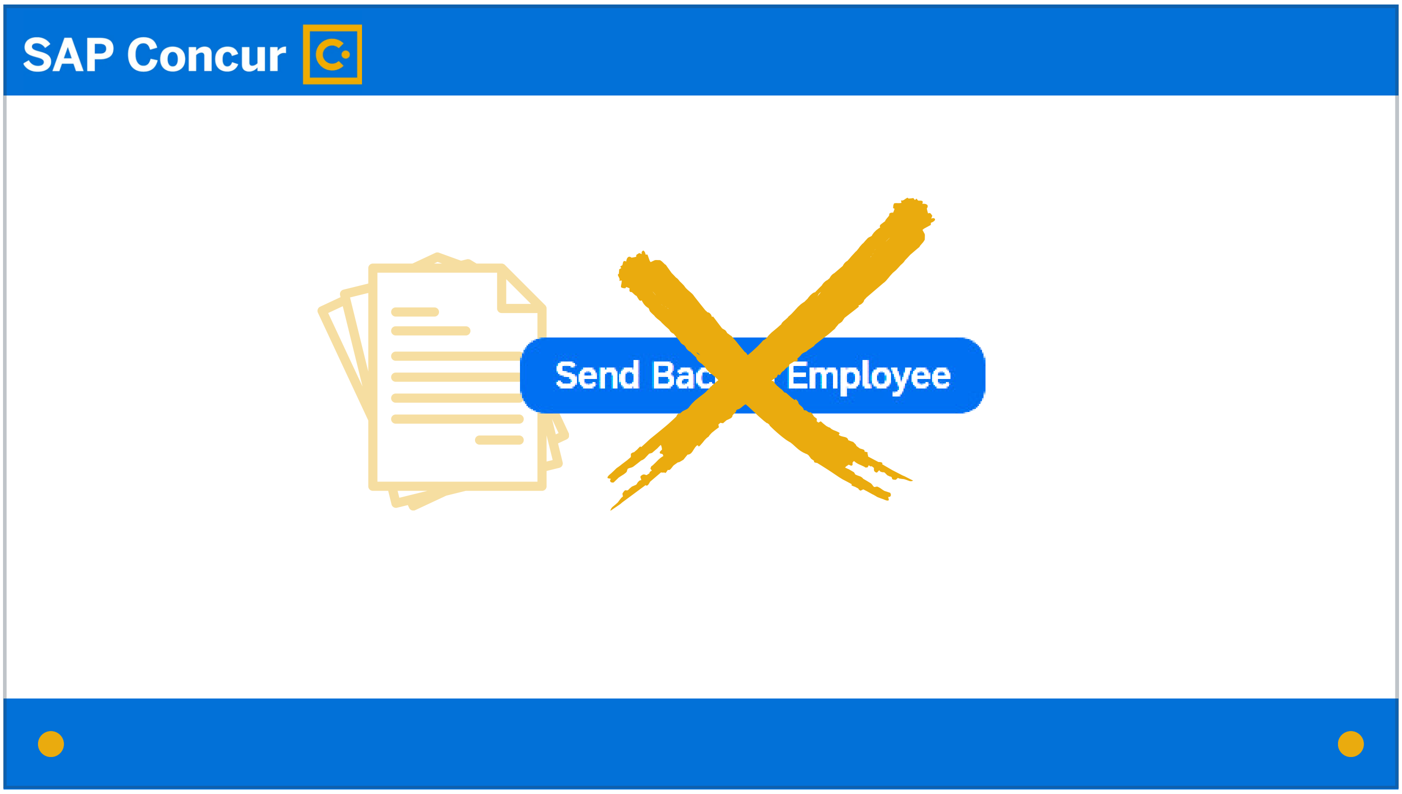


Click on the alerts dropdown menu at the far right to view the alerts and determine if action is needed to resolve them.

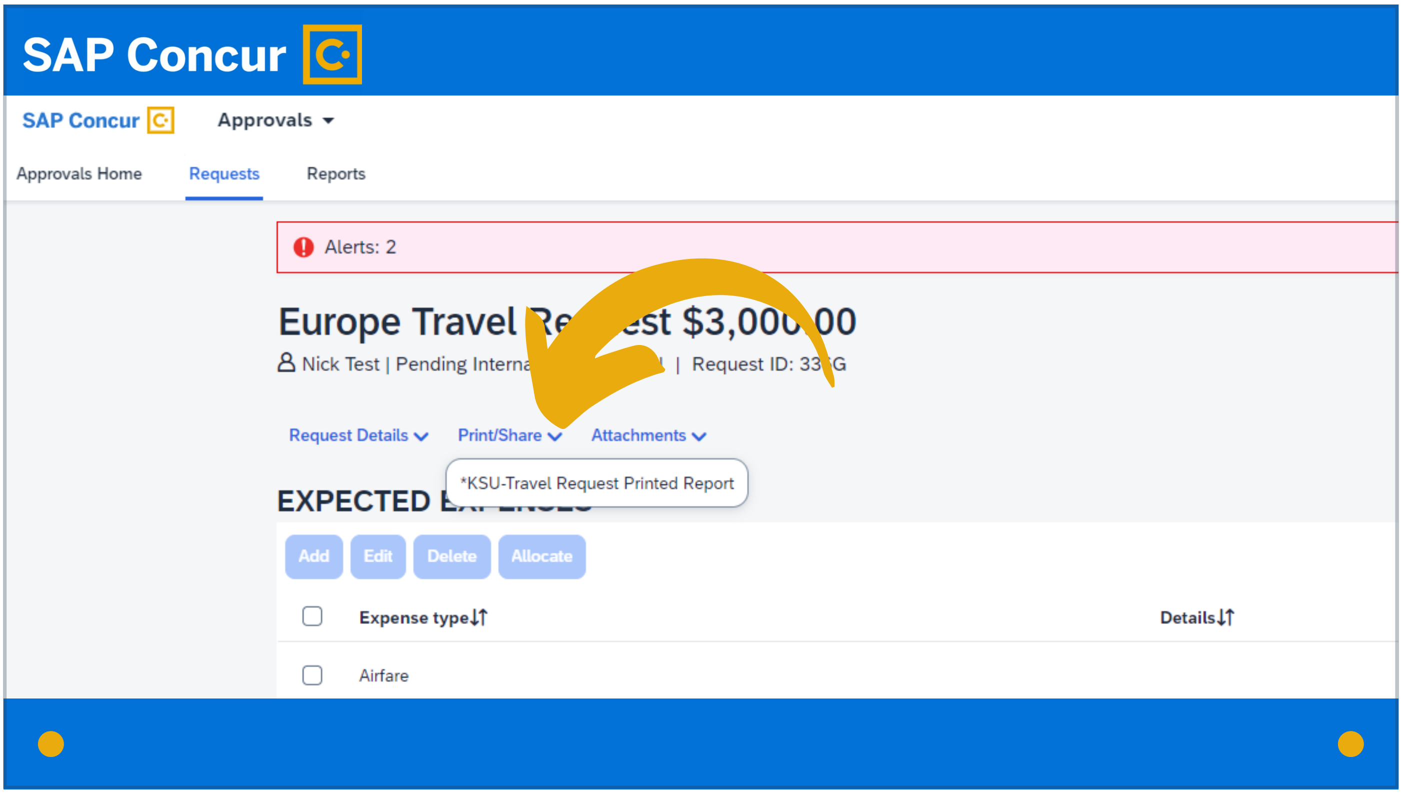


Once you have reviewed all aspects of the report, you have the options to approve it or send it back to the employee.

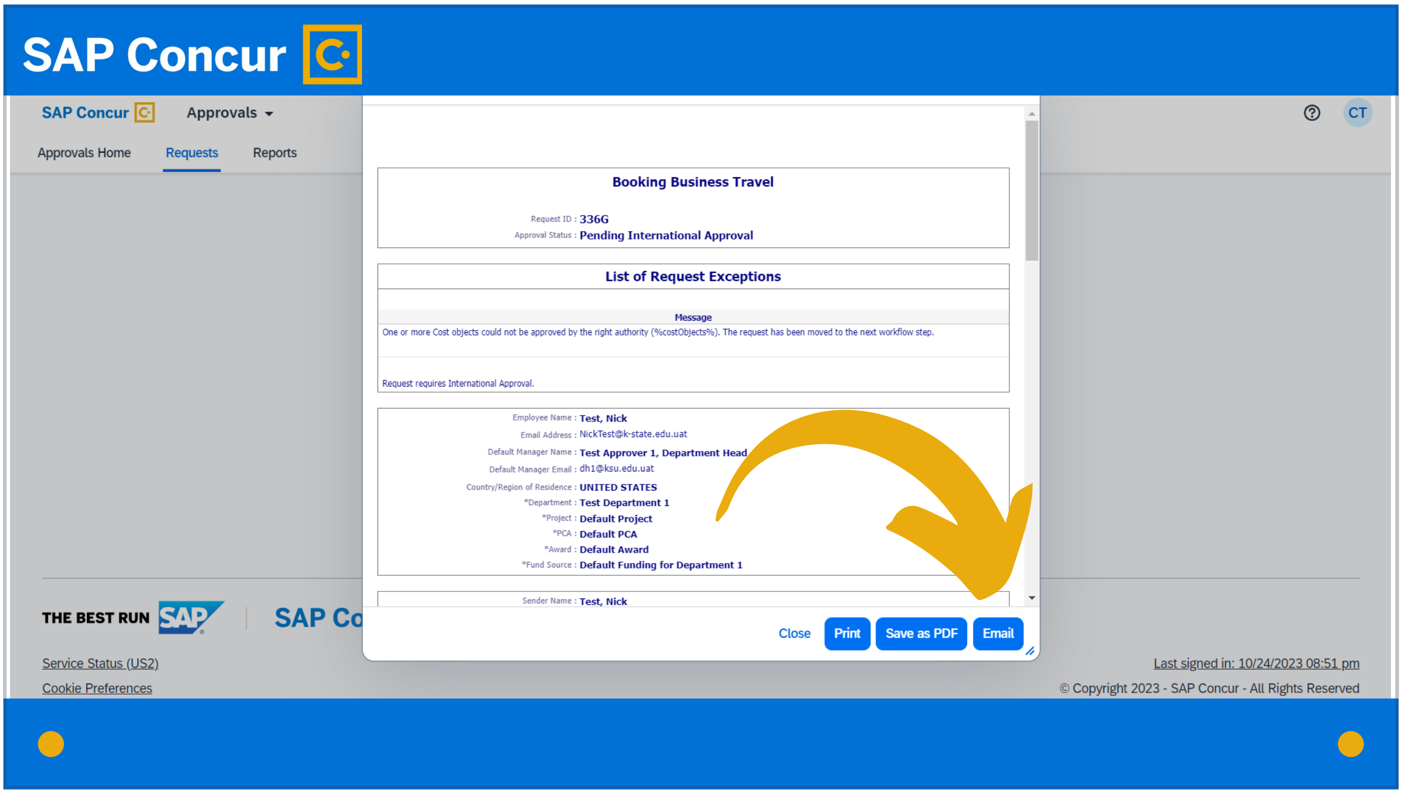
Important!



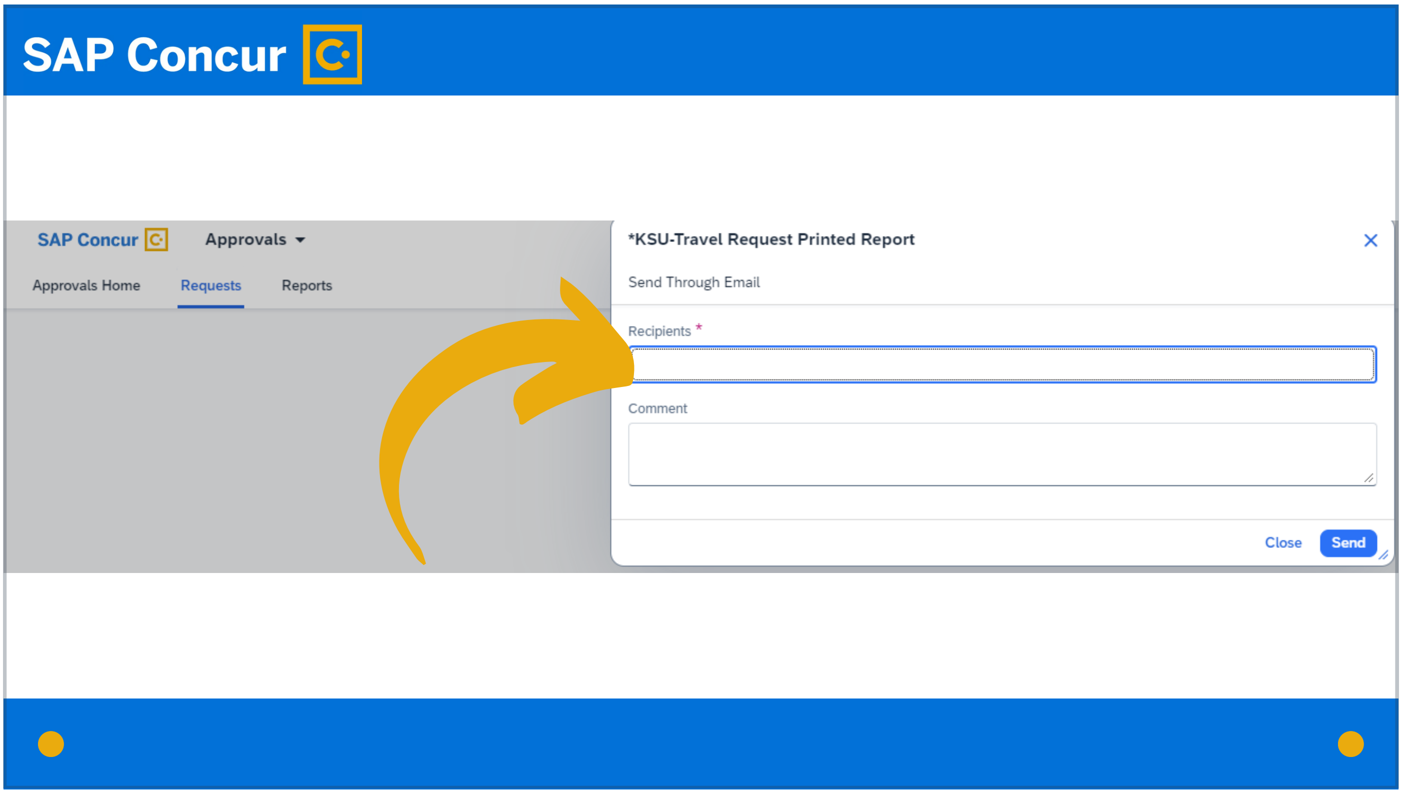
If the reason you cannot approve the request is that required documentation or a clarifying comment is needed, it is better to email the employee to ask them to attach the documentation or add the comment. Documentation and comments can be appended to a request at any time, but if the request gets sent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



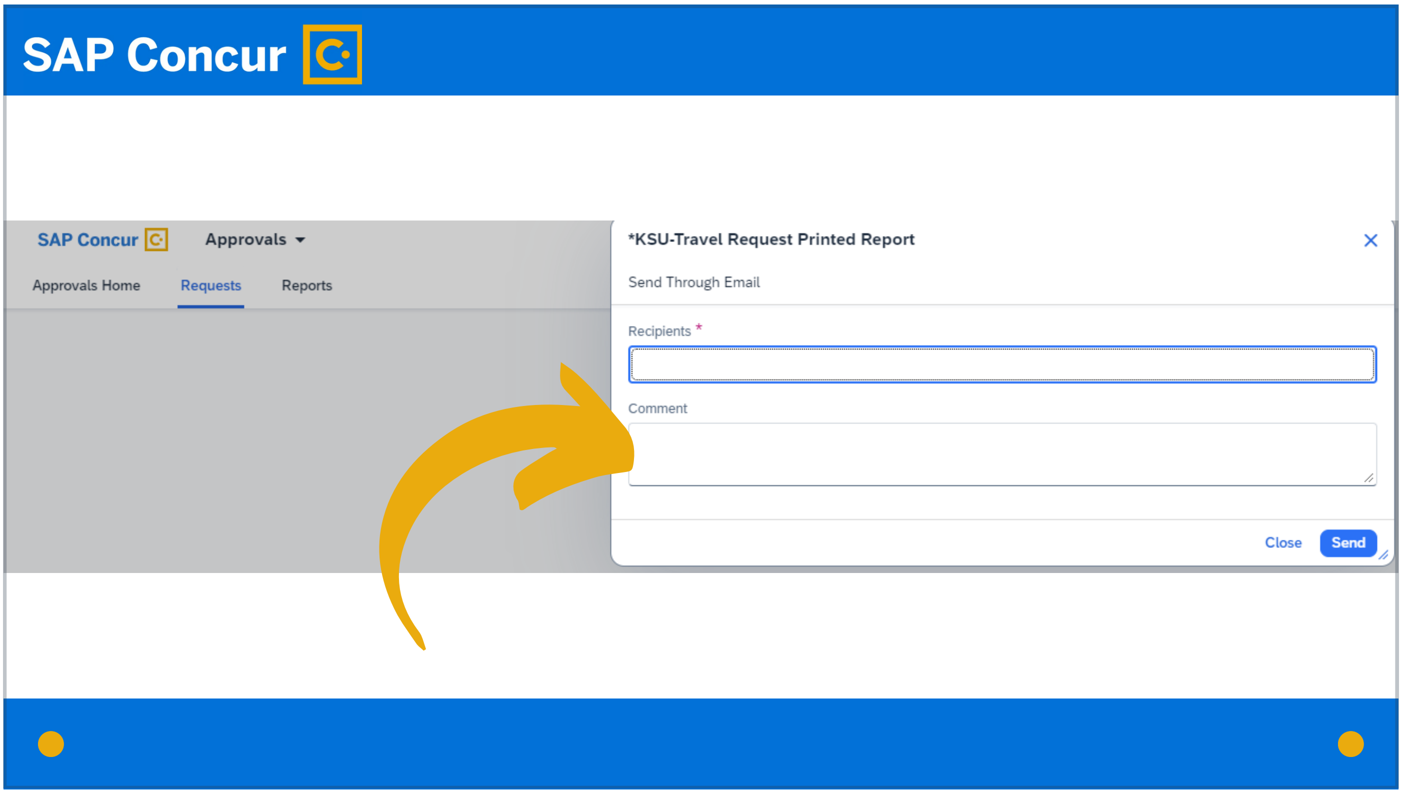
To email the employee, click the Print/Share dropdown menu and select KSU Travel Request Printed Report.



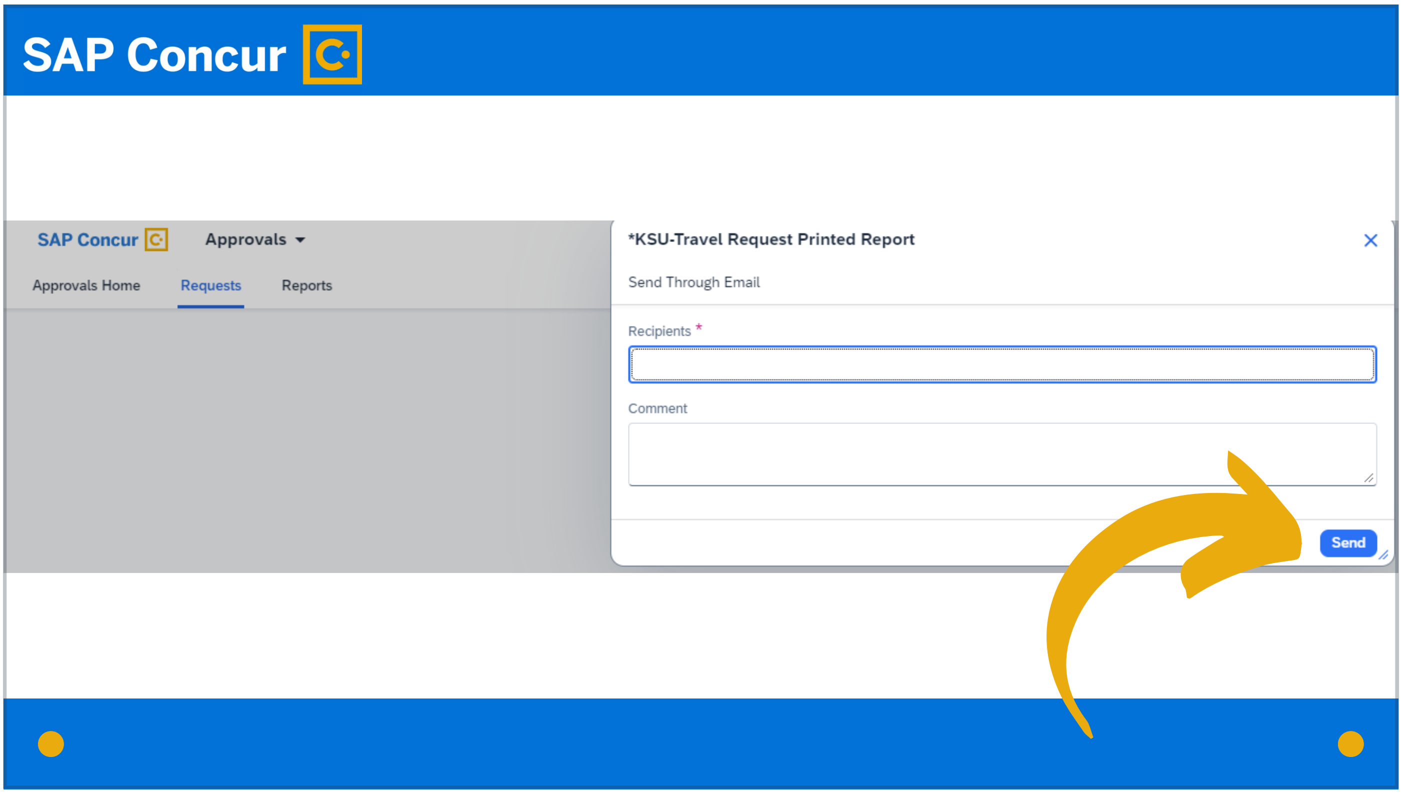
When the report window opens, click the Email button in the bottom right corner of that window.



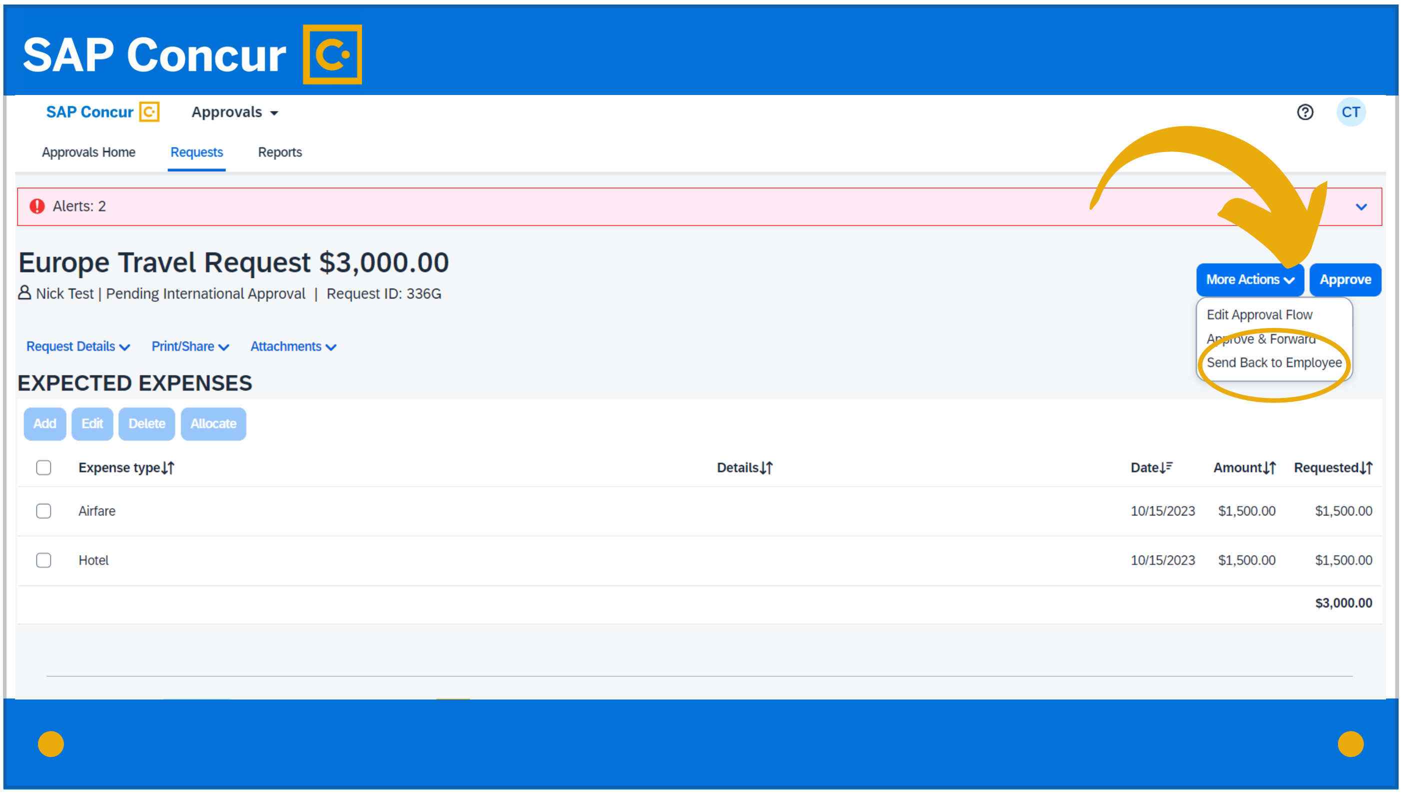
Enter the email address of the employee,



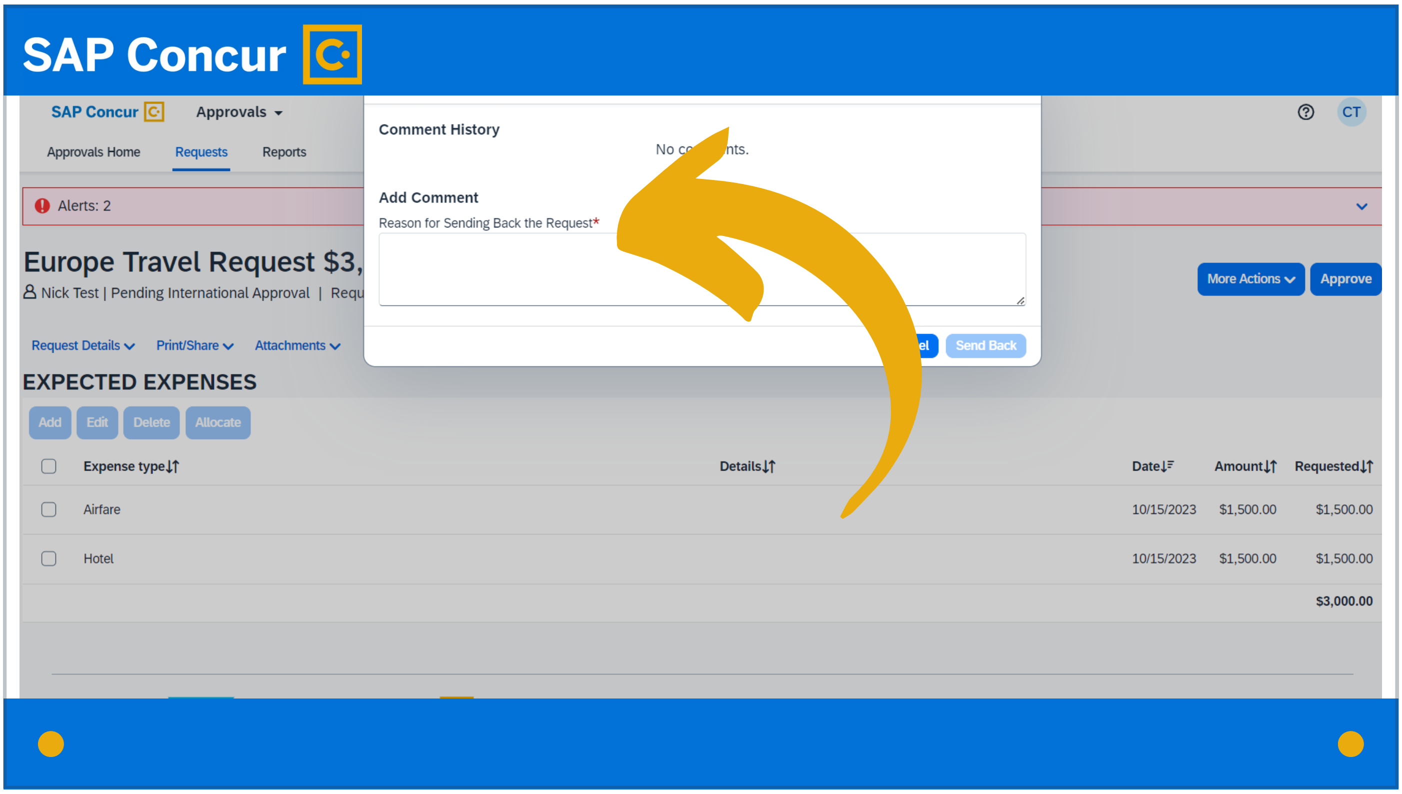
and add a comment explaining what needs to be appended.



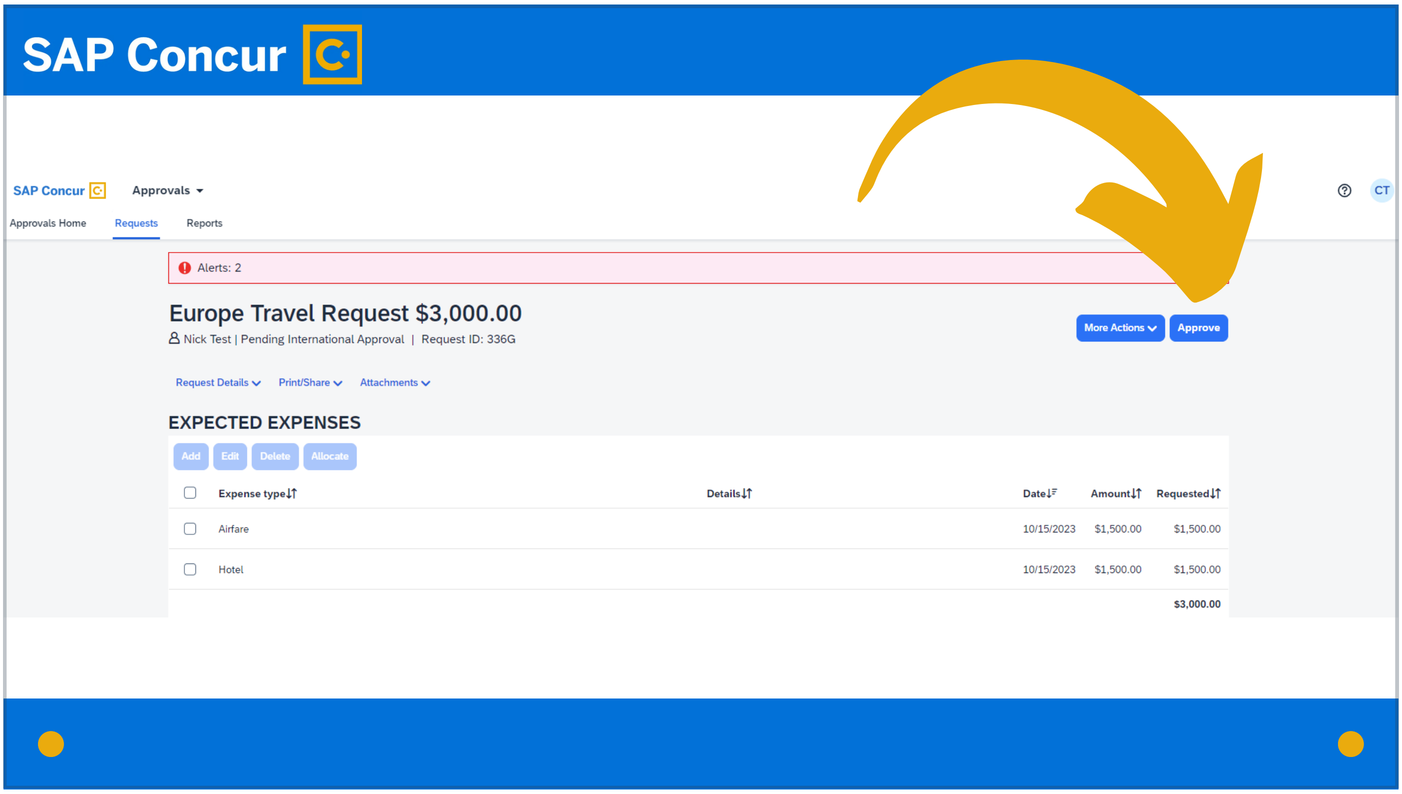
Then click Send.



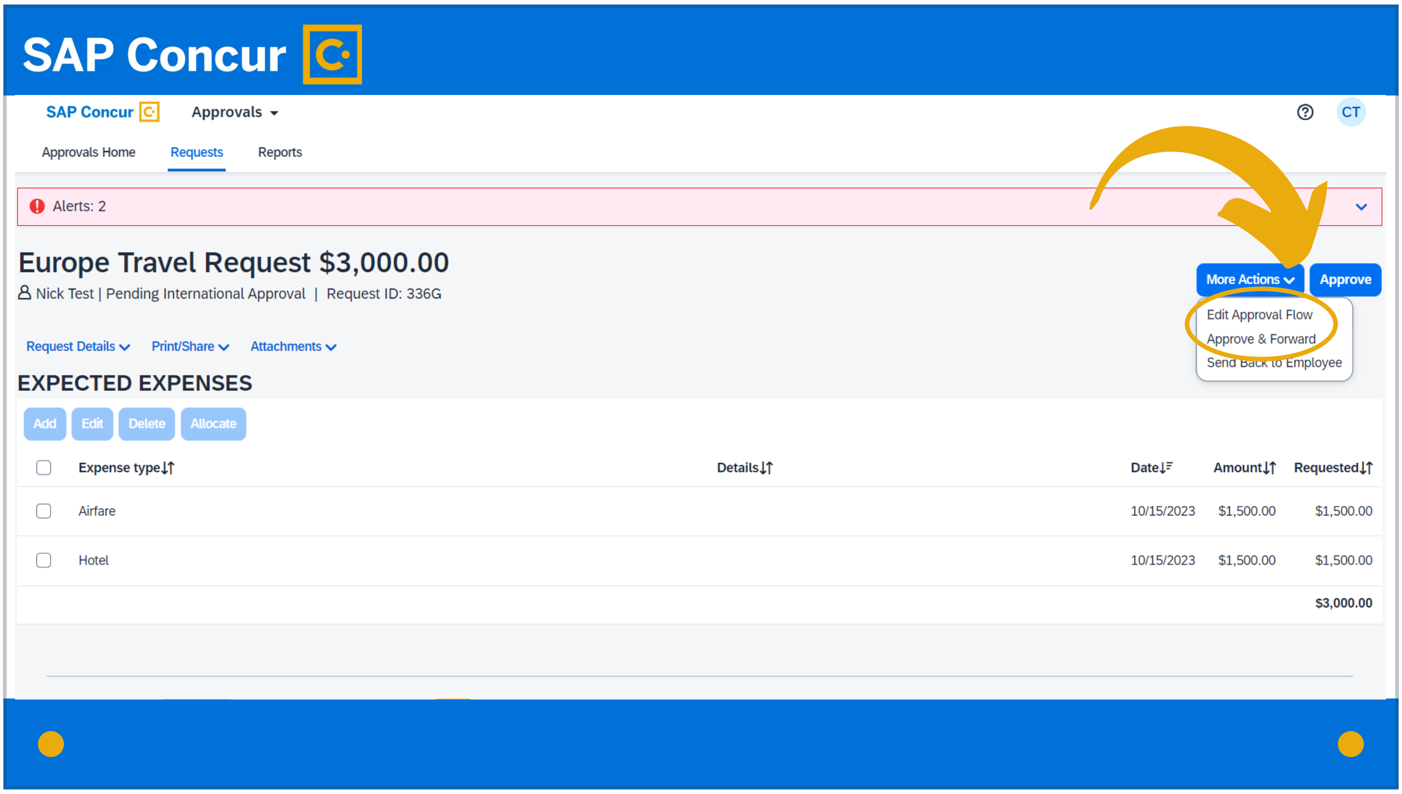
If something other than missing documentation or comment clarification is the reason the report cannot be approved and it is necessary for the report to be sent back to the employee, click the More Actions dropdown menu and the Send Back to Employee option.



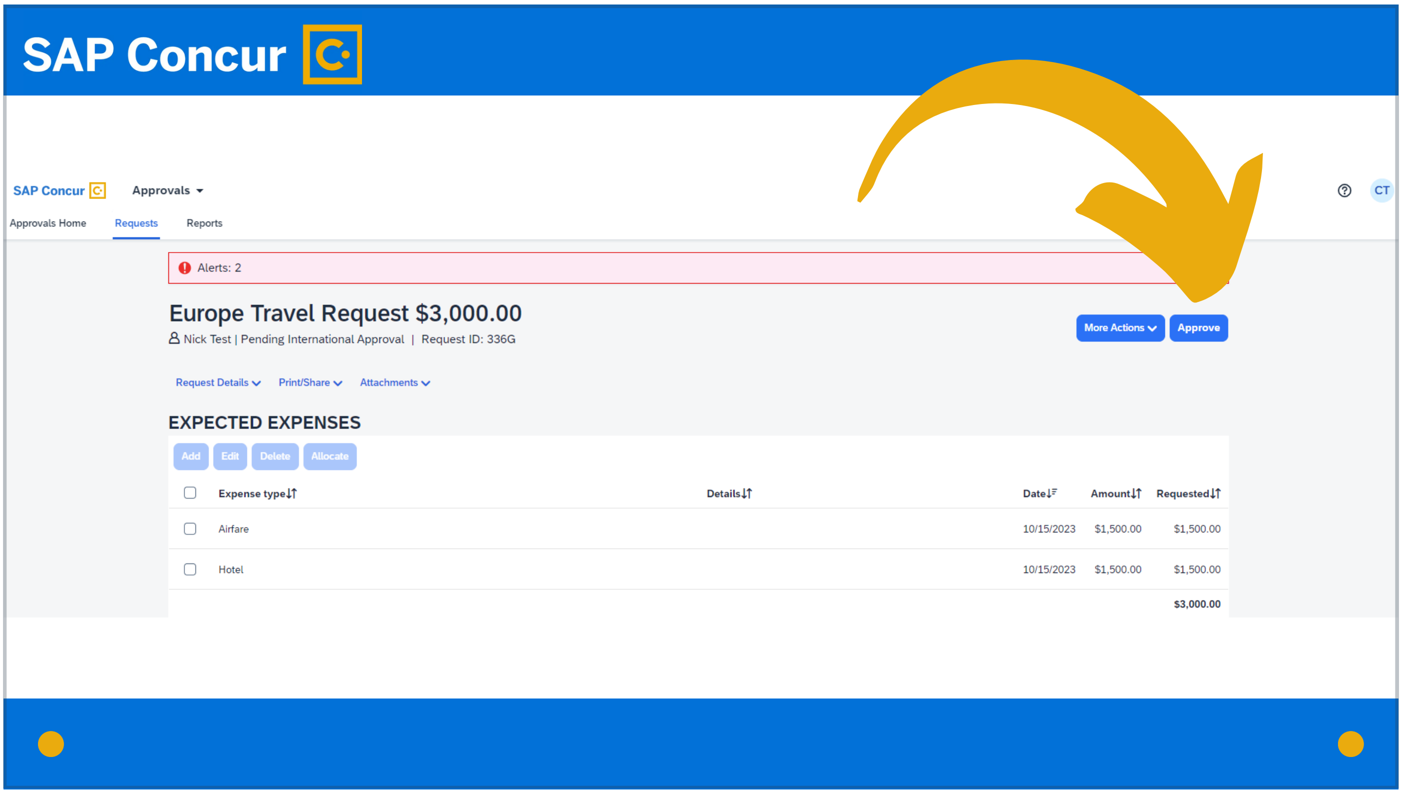
In the comments box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.



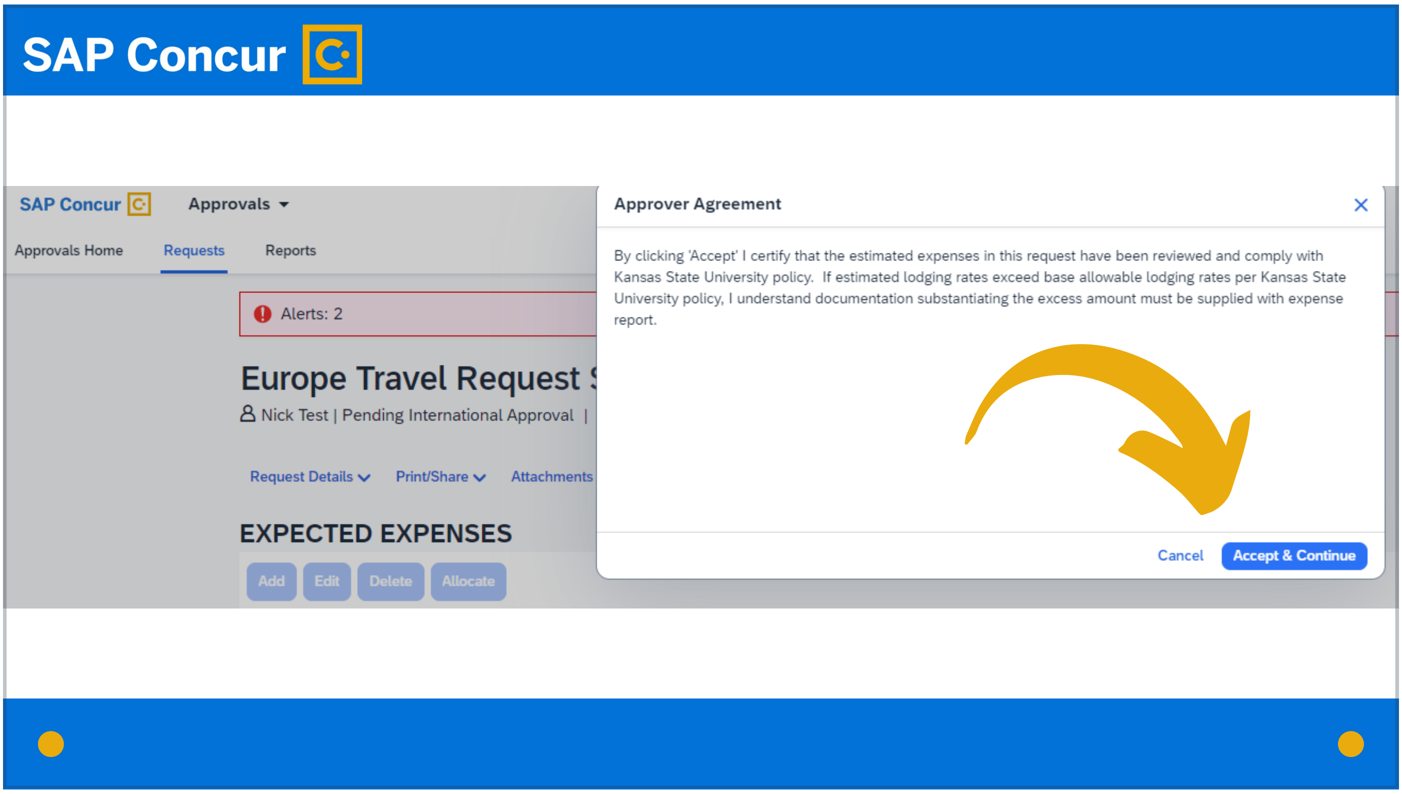
If the report is good to be approved, you can either click the Approve button



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,



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.