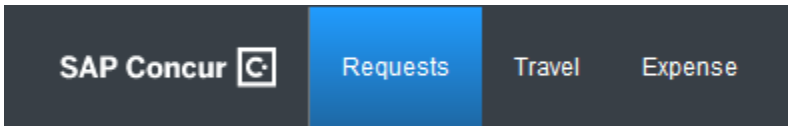
CAL MARITIME

TRAVEL REQUEST APPROVAL

https://www.csum.edu/fiscal-services/concur.html
Accounts Payable Office Adm Bldg, Rm 109

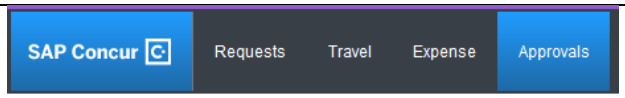
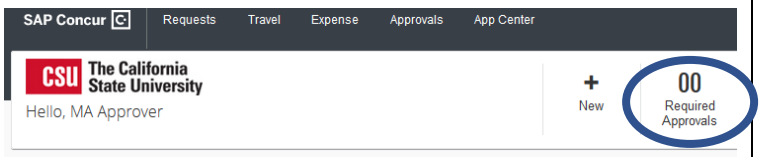
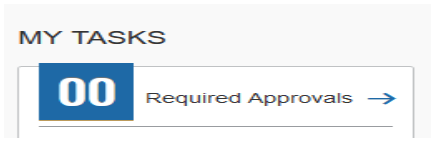
APPROVING TRAVEL REQUEST THROUGH SAP CONCUR



To access Concur: Click **Here**

Accessing Expense Reports Pending Approval:

From the Concur Homepage, click one of the following:

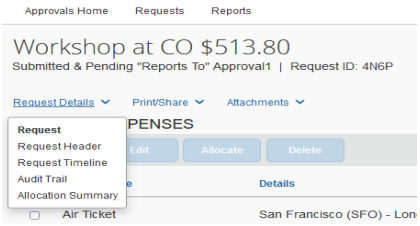
• **Approvals** link on the Quick Task Bar	
• **Required Approvals** link to the left of the left of The California State University banner	
• **Required Approvals** link found under My Tasks	

Approval Options:

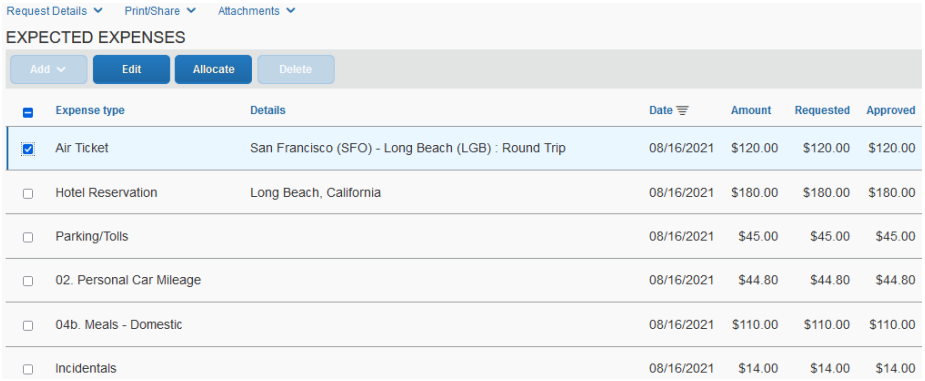
1. ***Approve a submitted Travel Request***

   a. Click the name of the request you want to open

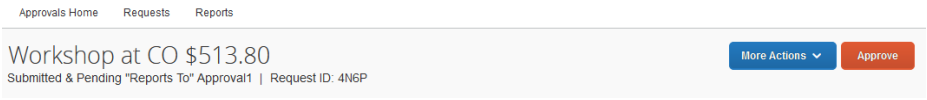
b. Review Request Header and Expected Expense details for compliance
   i. Click Request Details and select Request Header to review travel information



   ii. Click the Expense Item to view account allocations, comments, and exceptions
   Or check the box to display/edit specific expense item details

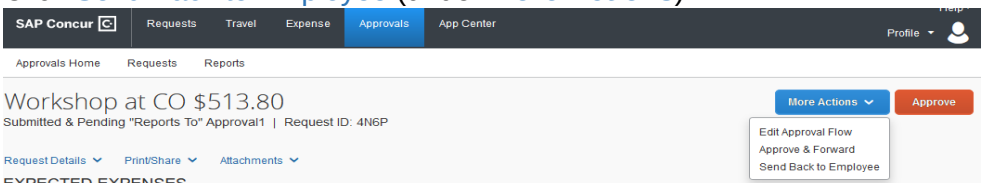


c. After reviewing all items, click **Approve**



2. ***Send Travel Request Back to the Employee*** –
Approvers cannot modify travel request. If the travel request requires correction, send it back to the Employee.

   a. Click the name of the report you want to open
   b. Click Send Back to Employee (under **More Actions**)



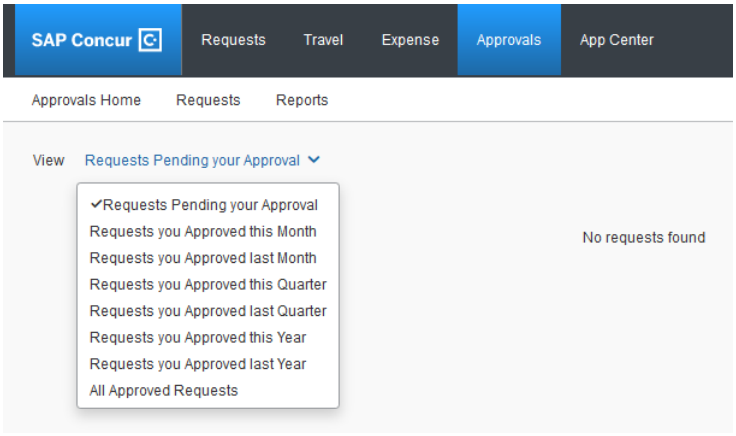
   c. Use the Comment field in the Send Back to Employee window to explain the reason the request is being returned to the employee, then click OK

COST OBJECT APPROVER = Delegation of Authority (DOA)

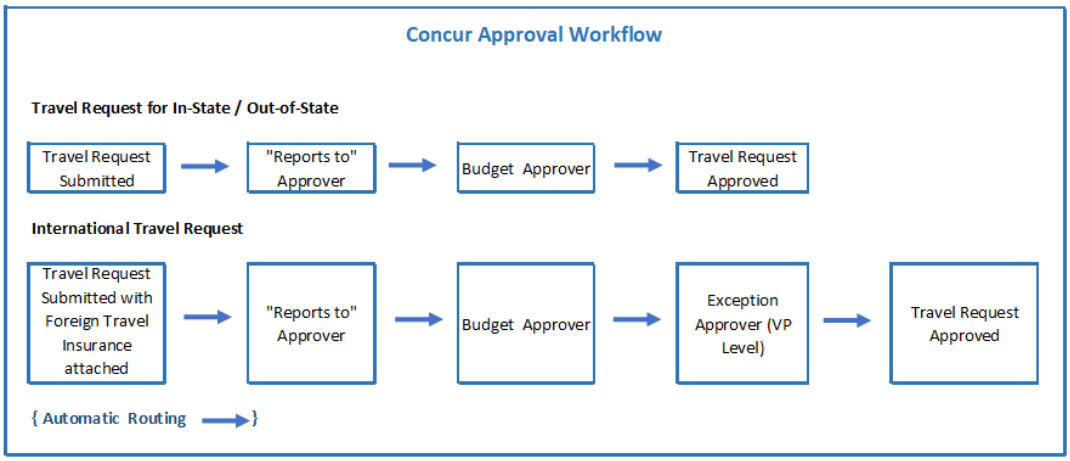
- When entering a Travel Request, the Concur system allows you to charge to one or multiple chartfield designations (split by amount or %).
- If expenses are shared between a home department and an outside department, upon submission, the travel request will simultaneously forward to the appropriate approving authority for that chartfield designation.
- Each approver can take individual action on the travel request. The employee must only make travel reservation once the travel request has been approved by all appropriate approvers.

VIEW APPROVED REQUESTS

- You may go back to review any requests you have already approved
- From the **Approvals** tab, click **Requests**
- On the left side of the screen change your **View** to filter for the reports you want to review



APPROVAL WORKFLOW



Approval flow:

Request Flow	Expense Flow
Domestic	
Traveler submits	Traveler submits
Approver-HR Reports to Supervisor	Approver- HR Reports to Supervisor
Budget Approver 1 - DOA	Budget Approver 1 - DOA
Processor Approve [AP Office]	Processor-Don't Approve

Banned State, International, & High Hazard	
Traveler submits	Traveler submits
Approver-HR Reports to Supervisor	Approver- HR Reports to Supervisor
Budget Approver 1 - DOA	Budget Approver 1 - DOA
Exception – Risk Manager / President Designee	Processor-Don't Approve
Processor Approve	

War Risk	
Traveler submits	Traveler submits
Approver-Supervisor	Approver-Supervisor
Budget Approver 1	Budget Approver 1
Exception – Risk Manager / President Designee	Processor-Don't Approve
War Risk	
Processor Approve	

NOTE: The same procedures apply for locating, reviewing, and approving Expense Reports