CONCUR | APPROVING TRAVEL REQUESTS

OVERVIEW

This document will provide an overview of how to review and approve a travel request that has been submitted for approval through Concur.

REVIEWING A REQUEST

1. An email will be sent to the appropriate approver when a request requires approval.
2. From the Concur homepage, click the Approvals tab. The Approvals view displays.
3. Click the Requests tab. A list of requests pending approval displays.
4. Double-click the appropriate travel request. The travel request details display.
5. Review the travel request details.
6. Click the Request Header tab.
   a. Make note of any exception warnings. Take appropriate action with the traveler, as necessary.
   b. Review travel dates, purpose, destination, business purpose, account number, etc.

NOTE: Business Start and Business End Date should reflect the business travel dates, excluding any personal dates that may apply. Personal travel dates should be noted in the Personal Travel Date fields, as applicable.

7. Click the Segments tab, when applicable review:
   a. Air Ticket details, including Estimated Amount.
   b. Hotel Reservation details, including Estimated Amount.
   c. Car Rental details, including Estimated Amount.
8. Click the Expense Summary tab.

Segments display as individual line items.

9. Review additional expenses listed. e.g., meals, mileage, ground transportation, etc.

NOTE: If a request does not include additional expenses that approver expects this traveler to incur during the respective trip, approve CAN send back to the traveler to update accordingly, and then traveler will resubmit for approval.

10. Click the Attachments dropdown, and then click Check Attachments to review any additional details.

APPROVING A REQUEST

1. After reviewing header details, segments, attachments, and other expense details, the Approver has options to:
   • Approve the Request, or
   • Send Back the Request (with comments), or
   • Approve & Forward (to another Approver)

To Approve a Request

1. Click Approve. The request moves to the next step in the approval process. The next approver in the
workflow receives an email, identifying a new request is pending their approval.

NOTE(S): 1) As an approver you can alternatively Approve or Send Back the Request via the Concur Mobile App.

2) If any part of the travel includes banned states, level 3 or 4 country/region, and/or embargo country additional approval is automatically built into the Concur approval workflow.

SENDING BACK A REQUEST

When a travel request is incorrect (e.g., does not conform to University policy, is not approved for budgetary means, or for any other reason, etc.) you can send the request back to the employee.

1. From the open travel request, click Send Back Request. A Send Back Request Comment screen displays.

   Enter a comment to the employee, explaining why the request is being returned.

2. Click OK to confirm. The request is sent back and an email notification is sent to the traveler.

APPROVE & FORWARD

Concur allows any approver to assign an additional approver in Concur, as desired.

1. Click the Approval Flow tab.

2. Click one of the “+” icons from the Fiscal Officer Approver field.

   3. Click the first “+” icon to add an approver before the Fiscal Officer. A User-Added Approver field displays.

   4. Click the second “+” icon to add an approver after the Fiscal Officer’s approval. A User-Added Approver field displays.

   5. Click within the User-Added Approver field, and then click the Search Approvers By dropdown.

   6. Click to select criteria to search by.

7. Type the approvers respective information in the search field. A filtered list of users displays.

8. Click to select a valid entry from the list of approvers.

9. Click Save Workflow (from the main view).

10. Continue as needed, and then click Approve review has been completed.

11. Click Approve. An email is sent to the new approver to notify them of a new request pending their approval.

ADDITIONAL SUPPORT

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to https://concurproject.uconn.edu/home/