



SACRAMENTO
STATE

Travel Request and Expense Approval Workflow

Attached are two slides that explain the Travel Request and Expense Report Approval Workflow. Please note the following:

- The travel approver cannot be changed. If it is incorrect, please notify the travel administrator. Please do NOT submit a request or report with an incorrect travel approver.
- If you are not sure what your approval workflow should be, please consult with your department or division administrative person.

Please make sure there is a name in each field and it is the correct approver. Concur will send approval emails to the approvers needed based on the information included in your travel request. The only blank field should be the Approval for Processing field.

The **Request approval workflow** requires a name in each box. Concur sends approval emails only to the approvers needed based on the information that is included in your Request. A name in each approval field does not necessarily mean each approver will need to approve a particular request (that is why the comment, “this step may be skipped” appears).

Request 331

Delete Request Submit Request

Status: Not Submitted

Amount: \$792.00

Request/Trip Name: International test

Request Header Segments Expenses Approval Flow Audit Trail

Budget approval is an optional step in the workflow. If your request needs a Budget approver, the appropriate name will be filled in.

International Trips, Banned States, or High Hazard Countries Only. Will skip this step if your trip type is NOT International.

"Reports To" Approval1:

Khangura, Daljit S.

(this step may be skipped)

Budget Approval:

(this step may be skipped)

"Reports To" Approval2:

Morgan, Denise P.

(this step may be skipped)

Exception Approval:

Test, President

(this step may be skipped)

"Reports To" Approver1 or "Reports To" Approver2 will self populate with your travel approver and CANNOT be changed. You may only have one or the other filled in depending on your campus workflow. If this is not correct contact the Travel Administrator.

Click the **orange Submit Request** button to submit the Request. You will receive confirmation your Request was successfully submitted! The approver will get an email alerting them that the Request is waiting for their approval.



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Redefine the Possible

Below is an example of the Expense Report Approval Flow. If you are not sure who needs to be in your approval workflow please check with your division or department administrative support person. Once you have submitted the Report you will receive an onscreen notification that the Report has been successfully submitted with a synopsis of what was entered.

Approval Flow for Report: Houston Training

"Reports To" Approval1:
Khangura, Daljit S.
(this step may be skipped)

Cost Object Approval:

"Report To" Approval2:
Morgan, Denise P.
(this step may be skipped)

Approval for Processing:

Submit Report Save Workflow Cancel

"Reports To" Approver1 or "Reports To" Approver2 will self populate with your travel approver and CANNOT be changed. You may only have Approver1 or Approver2 or both filled in depending on your campus workflow. If this is not correct contact the Travel Administrator.

Cost Object Approval is an optional step in the workflow. If your request needs a Budget approver, the appropriate name will be filled in.

If another approver needs to be added please click the plus sign to add approver and type in their last name and click on it.

Accounts Payable use only! This is the only box that it is intended to be blank when submitting; the system will automatically route to Accounts Payable at the appropriate time.



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**If further information or assistance is needed, please do not
hesitate to contact Accounts Payable/Travel at 916-278-6477.**