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2024

# Concur Pre-Trip Approval Guide

Statewide Travel Program



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# 1. Approval to Travel

Please note: Each agency has a different trip approval process, not all use the pre-approval process built into Concur. To understand your agency's approval process, please reach out to your agency Travel Coordinator(s).

Agencies with a pre-trip approval process require manager approval prior to booking state business related travel. Concur's pre-trip approval formalizes this process within the online booking tool, empowering managers to take a more direct role. All reservations made within Concur or by calling the contracted travel agency will require approval by the employee's direct manager, either within Concur or via email. When making a travel reservation, the traveler must follow all internal travel policies and make the reservation in the best interest of the state prior to submitting the trip for approval.

## 2. Travelers

### 2.1 What to Expect: Travelers

Once travel has been booked, there are no additional steps employees need to follow in Concur. Bookings will proceed as they always have to a final ticketing page.

**Trip Summary**

✓ **Finalize Trip**

- ✓ Review Travel Details
- ✓ Enter Trip Information
- Submit Trip Confirmation

**Trip Confirmation**

To **COMPLETE BOOKING**, please press the "Confirm Booking" Button after reviewing this page.  
To **CANCEL**, press the Cancel button.

After you complete this booking, it will be reserved; however, it will not be ticketed until it is approved by your company.

**Trip Overview**

Trip Name: Trip from Sacramento to Burbank  
Start Date: November 19, 2024  
End Date: November 20, 2024  
Created: September 04, 2024; [input field] (Modified: September 04, 2024)  
Description: CSAC Conference, Pasadena  
I agree to the Terms of Use and have read and will comply with State of CA travel and expense policy: Yes  
Agency Record Locator: 8WF771  
Passengers: [input field]  
Total Estimated Cost: \$199.08 USD

**i** This trip requires approval.  
The deadline for approval is: 09/05/2024 6:30 PM Pacific

View your plans in Triplt to stay one step ahead while traveling.  
Agency Name: CI Azumano - 37QB - California

**Reservations**

Tuesday, November 19, 2024

**Flight** Sacramento, CA (SMF) to Burbank, CA (BUR)  
Southwest 4844

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Upon selecting "Confirm Booking," the reservation will be sent to the employee's direct manager listed in Concur, for review and approval.

**SAP Concur** Travel ▾

Travel Arrangers Trip Library Templates Tools

**Trip Summary**

✔ Finished!

### Finished!

You have successfully booked your trip!

**Trip Record Locator : 8WF771**

**This trip is awaiting approval and must be approved by: 09/05/2024 06:30 pm Pacific. It will be automatically cancelled if it is not approved by that time. The itinerary will not be ticketed until your travel manager has approved the trip.**  
 Your itinerary has been saved. CI Azumano - 37QB - California will service your itinerary.  
**Please Note:** Fares are not guaranteed until tickets are issued and are subject to change without notice. Airfare must be ticketed by: 09/05/2024 08:30 pm Pacific

Travel Contact Information

**Trip Overview**

**DGS** CALIFORNIA DEPARTMENT OF GENERAL SERVICES

**Trip Name:** Trip from Sacramento to Burbank  
**Start Date:** November 19, 2024  
**End Date:** November 20, 2024  
**Created:** September 04, 2024, Kelly Bouchard (Modified: September 04, 2024)  
**Description:** CSAC Conference, Pasadena  
**I agree to the Terms of Use and have read and will comply with State of CA travel and expense policy:** Yes  
**Agency Record Locator:** 8WF771  
**Passengers:**   
**Total Estimated Cost:** \$199.08 USD

**i** This trip requires approval.  
 The deadline for approval is: 09/05/2024 6:30 PM Pacific

View your plans in TripIt to stay one step ahead while traveling.

**Agency Name:** CI Azumano - 37QB - California

While waiting for approval, the trip will show a note stating who needs to approve the trip and the approval deadline.

## Alerts

Company Notes **Upcoming Trips** Trips Awaiting Approval

Trip Name/Description	Status	Start Date	End Date	Action
<a href="#">Trip from Sacramento to Burbank (8WF771)</a> <i>CSAC Conference, Pasadena</i>	<b>Awaiting approval by</b> <input style="width: 100px;" type="text"/> <b>Approval deadline is</b> <b>09/05/2024 06:30 pm Pacific.</b>  <b>Trip will be automatically cancelled if not approved by then.</b>	11/19/2024	11/20/2024	Cancel Trip

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If approved, the trip will go to ticketing and a final itinerary will be provided to the traveler via email. If rejected, the traveler will receive an email advising that the trip was not approved.

Your request 'Trip from Sacramento to Burbank' was approved.

Approval Queue <ApprovalDaemon@concur.com>  
To: [redacted]@DGS

Reply Reply All Forward

Wed 9/4/2024 11:20 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from a NON-State email address. Do not click links or open attachments unless you are certain of the sender's authenticity.

**This is a notification only - no action is required.**

**What is the status of my trip request?**  
Your request 'Trip from Sacramento to Burbank' was approved.  
Approved on Wednesday, September 04, 2024 at 02:19 pm Eastern Time by: [redacted]  
Comments:  
This is a system-generated email. Please do not reply.

## 2.2 Reservations by Phone

Reservations that are called into CI Azumano will still require manager approval. The agent will prepare the trip to be booked, then email the manager for approval. If approved, the agent will complete the booking, and a final itinerary will be provided to the traveler via email.

## 2.3 Manager Approval

Employees should always strive to ensure their assigned manager in Concur is up to date. This field can be found under "Profile Settings."

Please note: only travel administrators are able to make changes to managers. Please contact your agency Travel Coordinator for assistance.

SAP Concur Profile

Profile Personal Information Change Password System Settings Travel Vacation Reassignment

**Your Information**  
Personal Information  
Company Information  
Contact Information  
Email Addresses  
Emergency Contact  
Credit Cards

**Travel Settings**  
Travel Preferences  
International Travel  
Frequent-Traveler Programs  
Assistants/Arrangers

**Other Settings**  
System Settings  
Concur Connect  
Change Password  
Travel Vacation Reassignment  
Concur Mobile Registration  
I'm Assisting...

**My Profile - Personal Information**

Jump To: Personal Information Choose

To see the Notice on Collection for details on how the Statewide Travel Program collects, uses, and shares personal information you provide through this form, please follow this link: <https://www.dgs.ca.gov/OFAM/Travel>

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked [Required] and [Required\*\*] (validated and required) must be completed to save your profile.

**Important Note**  
Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title First Name Middle Name [Required] Preferred Name Last Name Suffix

[dropdown] William [dropdown] [checkbox] No Middle Name [dropdown] Never [dropdown]

**Company Information** Go to top

Employee ID

Manager [dropdown] Org. Unit/Division [dropdown] Employee Position/Title [dropdown]

Save

### 3.Managers

#### 3.1 What to Expect: Managers

All approving managers will need to have a Concur profile. Please work with your agency travel coordinator to have a profile created.

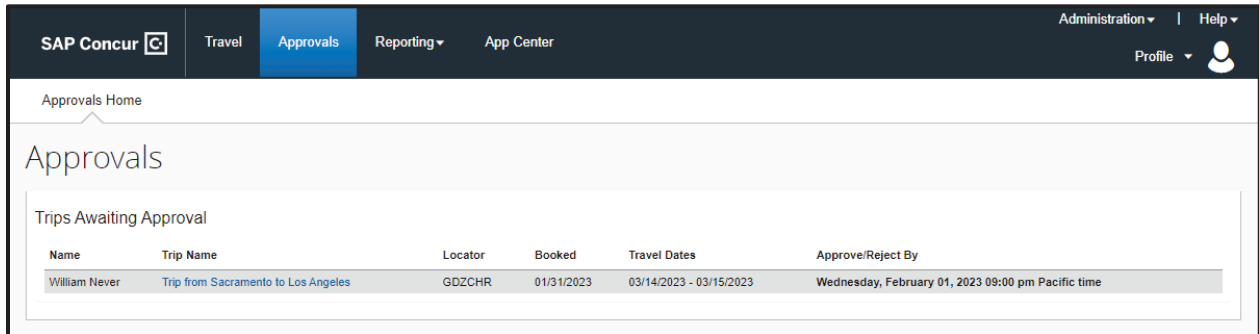
Managers have two methods to review a trip. Regardless of the method used, an email alert will be sent to the manager whenever a new trip is ready for review. Action must be taken prior to the approval deadline, which is typically within 24 hours.

For a hard stop approval: if no action is taken, the trip will be automatically cancelled, and the employee will need to rebook and resubmit the trip for review.

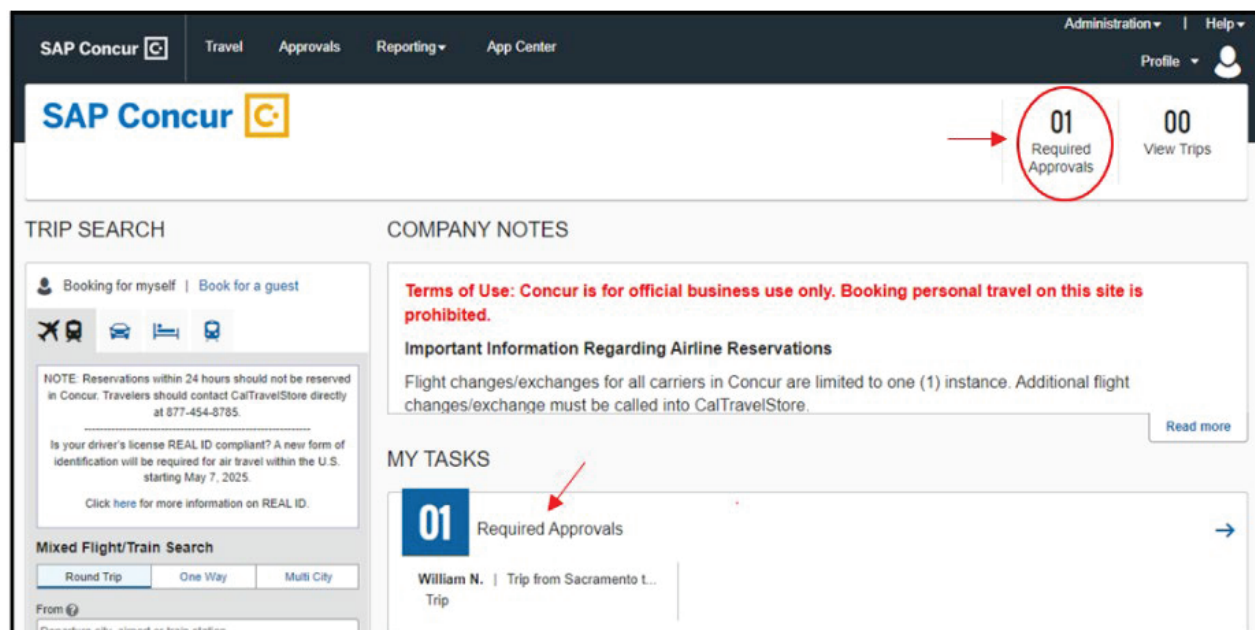
For a passive approval: the trip will proceed to ticketing if no action is taken within the ticketing time limit.

#### 3.2 Approval Via Concur

All pending trips will be viewable in the “Approval” tab in Concur.



Managers will also see an alert for this on the Concur homepage. On the Approval tab, managers will see a list of all trips requiring their review and approval.



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Upon selecting a trip, the full itinerary will be visible, with options to Approve or Reject the trip. The manager will make their choice and follow-up emails for the respective choice will be sent out.

The screenshot displays the SAP Concur web interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Travel', 'Approvals' (selected), 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', and a user profile icon. Below the navigation bar, the page title is 'Approvals Home' and 'Approvals'. A table titled 'Trips Awaiting Approval' is partially visible, showing a row for 'William Never' with a 'Trip from' field. A modal window titled 'Request Requiring Your Approval' is open in the foreground. The modal contains the following text: 'Request Requiring Your Approval', 'This trip must be approved by: Wednesday, February 01, 2023 09:00 pm Pacific time. If it is rejected, it will be automatically cancelled by that time unless resubmitted. It will be automatically cancelled if you do not approve it by that time.' Below this text are three buttons: 'Approve', 'Reject', and 'Close'. The modal also has a 'Request Status/History' tab and a 'Travel Itinerary' tab. Under the 'Request Status/History' tab, there is a table with the following data:

All trips - Require Approval	
Item Name:	Trip from Sacramento to Los Angeles
Trip Description:	No description
Meeting Name:	
Submitted By:	William Never
Submitted on:	Tuesday, January 31, 2023 02:52 pm Pacific Time
Last Ticket Date:	Wednesday, February 01, 2023 11:00 pm Pacific Time
I agree to the Terms of Use and have read and will comply with State of CA travel and expense policy	Yes
Unit-4 digit number	1111
Project-10 digits alpha numeric, no spaces or special characters allowed.	1111111111
Project Phase: use applicable Project Phase only- one single digit or up to 6 digits of actual Phase	111111
Object Code	In State 008
Reporting-1 to 10 digits alpha numeric no spaces or special characters allowed (Optional).	1111111111
Why was no hotel reserved?	I will book a hotel now.

At the bottom of the modal, there is a 'Sign Out' button. The background page shows a footer with the SAP logo, 'Travel Policy', 'Service Status (US2)', 'Cookie Preferences', and 'Last signed in: 01/30/2023 09:07 am'. The bottom right corner of the page contains the text '© 2023 - SAP Concur - All Rights Reserved'.

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### 3.3 Approval Via Email

Managers also have the option to approve trips via email. When an employee's trip is sent for review and approval, the manager will receive an email prompting them to reply either "Approve" or "Reject" to the email. Upon a decision, follow-up emails for the respective choice will be sent out.

It is important to note that Concur will only accept an "Approve" or "Reject" response. Any other response will cause errors with the approval process.

**From:** Concur Travel <TravelWizardApprovalsUS2@concur.com>  
**Sent:** Wednesday, September 4, 2024 10:01 AM  
**To:** [redacted]@dgs.ca.gov  
**Subject:** Travel approval required (traveler name: [redacted])

**CAUTION:** This email originated from a NON-State email address. Do not click links or open attachments unless you are certain of the sender's authenticity.

**Action required**

One of your employees has submitted a request for travel that requires approval. Please review the trip details, then approve or reject the request following the instructions below.

**Traveler Name:**  
[redacted]

**What do I need to do?**  
You can approve or reject this trip by either:

- Replying to this email with the word "Approve" or "Reject"
- Logging into Concur Travel and following the instructions to approve or reject the trip

**When do I need to do it by?**  
This trip must be approved or rejected by: 09/05/2024 6:30 PM Pacific time (09/05/2024 6:30 PM Pacific time). If you do not approve the trip by this time or if you reject the trip, it will automatically be cancelled.

**TRIP FROM SACRAMENTO TO BURBANK**

**Trip Description:**

CSAC CONFERENCE, PASADENA  
All reservations require manager approval - Require Approval

### 3.4 Travel Vacation Reassignment for Managers

Managers that will be on leave or otherwise unable to review trips must designate a back-up manager. The Concur Travel Vacation Reassignment function will allow a manager to assign a back-up manager for their time out of the office. The back-up manager must also have a Concur profile. While the assignment process is very quick, managers are expected to communicate with the back-up manager to ensure they are aware of the responsibilities. **Before assigning a back-up manager, all currently pending trips must be either approved or rejected.**

To access the Travel Vacation Reassignment, select "Profile Settings" in the upper right of the Concur homepage. On the settings page, select the Travel Vacation Reassignment option. Begin typing in the name of the back-up manager and their profile should auto populate. Complete the assignment by clicking Submit. When the reassignment is no longer needed, simply return to this screen and remove the reassignment.

## Travel Vacation Reassignment

Choose a person in your company who will handle travel approvals assigned to you in your absence. When you return from vacation, remember to come back here and clear out the backup manager so that you receive approvals as normal again.

**Note 1:** If your designated backup manager goes on vacation while you are also on vacation, then all travel approvals that are assigned to you will be redirected to your company's travel administrator.

**Note 2:** This will **not** reassign any items currently in your approval queue; please handle those before you leave.

Never, GENERALSERVICESCA

Submit

None



As noted on the Travel Vacation Reassignment page, trips that are currently pending approval will not be transferred over to the back-up manager.

### 3.5 Best Practices for Managers

1. Register for a Concur profile.
2. Use the Concur website or email to view and approve or deny trips submitted by direct reports.
3. Utilize the "Manager's Checklist" supplemental document before approving, to ensure the trip adheres to policy.
4. Follow-up with employees when trips are rejected. Ensure the rebooking meets policy.
5. If out of the office or unavailable to review trips:
  - a. Review all trips currently assigned. These will not transfer to the back-up manager.
  - b. Assign a back-up manager using Travel Vacation Reassignment.