

Concur Pre-Trip Approval Guide

Statewide Travel Program

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1. General Information

Each agency has set up their own travel approval process. If you are a traveler and have questions on your agency's process, please reach out to your agency Travel Coordinator(s).

This document will review the Concur pre-trip approval process. There are two types of approval processes through Concur: Passive Approval and Hard-Stop Approval.

1.1 Passive Approval

When a traveler books a trip that requires passive approval, the approving manager must actively **reject** the trip if they don't want the trip to occur. If the approving manager takes no action, the trip will be **approved** automatically.

1.2 Hard-Stop Approval

When a traveler books a trip that requires approval, the approving manager must actively **approve** the trip if they want the trip to occur. If the manager either rejects the trip or takes no action, the trip will be **rejected** automatically.

1.3 Both Approval Processes

The following applies to both the Passive and the Hard-Stop Approval Processes:

- The approval deadline is based on the ticketing deadline for airfare. See section 2.1 of this document for more information.
- It is recommended to communicate with your approving manager before and after booking a trip, so they promptly take action to approve the trip before the ticketing deadline.
- Flights are on hold until the trip has been approved; meaning that the price may increase or decrease once the approval is received.
- Once a hotel reservation is submitted for approval, all hotel rules and cancellation penalties apply. For example, if the hotel requires 48-hour notice and the stay begins tomorrow, the card will be charged regardless of approval status.
- For hotel reservations using a virtual card, the card will deploy regardless if a trip has been approved or rejected. The virtual card is deployed to hold the room. If the trip is rejected or canceled in accordance with the hotel's policy, the charges should be reversed.
- Approving managers can approve or reject travel through email or by logging into Concur. See section 3 of this document for more information.
- Travelers will receive an email indicating whether their trip was approved or rejected. Their trip will also show as "Approved" within Concur. See section 4 of this document for more information.

2. Approval Deadline

2.1 Reminders During the Booking Process

If your agency participates in Concur's pre-booking approval process, you will see two notes on the "Finalize" page during the booking process.

- A. Along the top of the "Finalize" page, you will see a note specifying when the airfare must be ticketed. This is standard industry practice. The approval deadline of approximately 24 hours is based on this deadline.
- B. At the bottom of the page, there will be a note that your travel needs to be approved due to agency policy. This is a reminder that your approving manager must approve your travel before it can be booked/ticketed. Ensure your approving manager is up-to-date before finalizing the booking. See section 4.1 of this document for more information.

i Airfare must be ticketed by: 01/22/2026 6:59 PM EST.

A

Finalize

Trip Overview
April 13, 2026 - April 14, 2026

Trip Name * 16/50

Trip - San Diego

Description 0/250

Traveler

BETA TESTER

✈ **Sacramento, CA (SMF) - San Diego, CA (SAN)**

Monday, April 13, 2026 Confirmed ▼

Confirmation Number: BV8TIA

✈ **San Diego, CA (SAN) - Sacramento, CA (SMF)**

Tuesday, April 14, 2026 Confirmed ▼

Confirmation Number: BV8TIA

Travel Policy Require Approval

A travel rule applies to this trip: B

2.2 Trip Confirmed Page

When you have finished booking the travel, you will see a note that specifies who needs to approve the travel as well as the deadline.

i This trip requires approval before January 22, 2026 3:07 PM EST (approver name: John Manager). Otherwise, it may be automatically canceled and a penalty fee may apply. The approver will be notified of any edits.

Trip Confirmed

An email confirmation will be sent to BETA TESTER .

[Back to Homepage](#) [View Trip Overview](#)

2.3 Confirmation Email

Once you have completed the booking, you can find the approval deadline by checking the confirmation email from Concur, as seen in the screenshot below.

Confirmation: Trip - San Diego, 04/12/2026 - 04/13/2026

Concur Travel <noreply@concursolutions.com>
To @DGS


Reply Reply All Forward

Wed 1/21/2026 9:30 AM

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

Car_Rental.ics 2 KB Car_Rental.ics 2 KB Hotel_Booking.ics 2 KB Hotel_Booking.ics 2 KB Air_Journey.ics 2 KB Trip_-_San_Diego.ics 6 KB

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.



Trip Confirmation [View Details](#)

Trip Status:
Confirmed

Traveler:
BETA TESTER

Dates:
04/12/2026 - 04/13/2026

Record Locator:
FP1W6W

i This trip requires approval before January 22, 2026 9:54 AM EST. Otherwise, it may be automatically canceled and a penalty fee may apply. The approver will be notified of any edits.

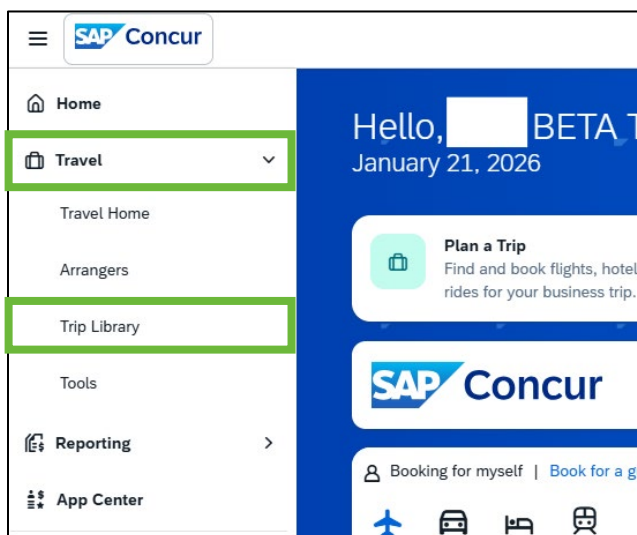
2.4 Trip Library

You can also see the approval deadline within Concur.

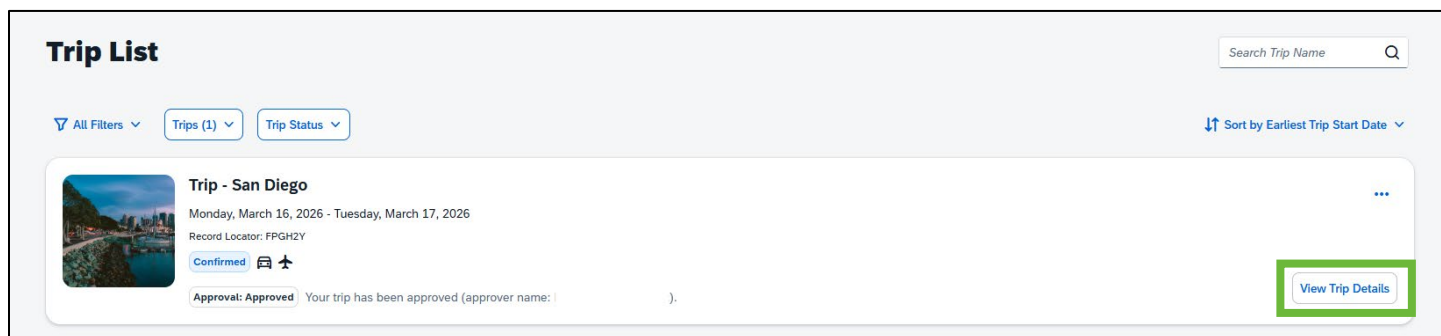
2.4.1 Find the Trip

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

Click "Travel," "Trip Library."

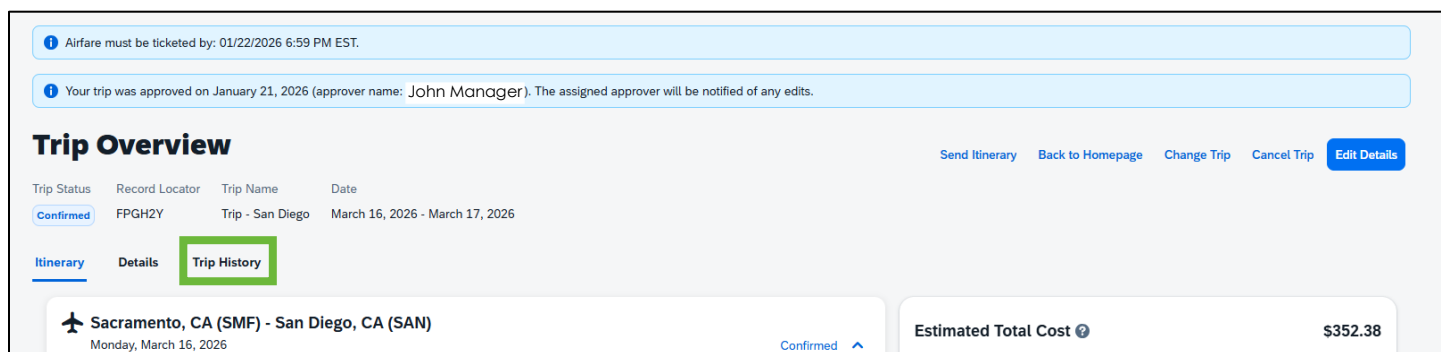


Locate the trip you want to check, then select "View Trip Details."



2.4.2 Trip History

Click "Trip History."



Once your approving manager approves the trip, you will see:

- A. The approval date, time, and who approved it.

You can see a detailed history of the trip, including:

- B. When the approval request was sent and to whom
- C. Booking date(s), time(s), and who booked

Trip Overview

| | | | |
|--|----------------|------------------|---------------------------------|
| Trip Status | Record Locator | Trip Name | Date |
| Confirmed | FPGH2Y | Trip - San Diego | March 16, 2026 - March 17, 2026 |

Itinerary Details Trip History

January 21, 2026

Trip Approved | 4:23 PM EST A

Your trip was approved on January 21, 2026 [approver: John Manager].

Confirmation Email Sent BETA TESTER | 4:21 PM EST

Email sent to BETA TESTER @dgs.ca.gov.

Approval Email Sent BETA TESTER : | 4:21 PM EST B

Email was sent to approver: John.Manager@dgs.ca.gov].

Trip Submitted for Approval BETA TESTER : | 4:21 PM EST

Trip requires approval by approver: John Manager by January 22, 2026, 2:21 PM EST.

Trip Confirmed BETA TESTER | 4:21 PM EST

Booking Created BETA TESTER | 4:21 PM EST C

Booked rental car: ENTERPRISE, SAN DIEGO

Confirmation: 68934184COUNT

Booking Created BETA TESTER | 4:21 PM EST

Booked flight: WN, SMF - SAN

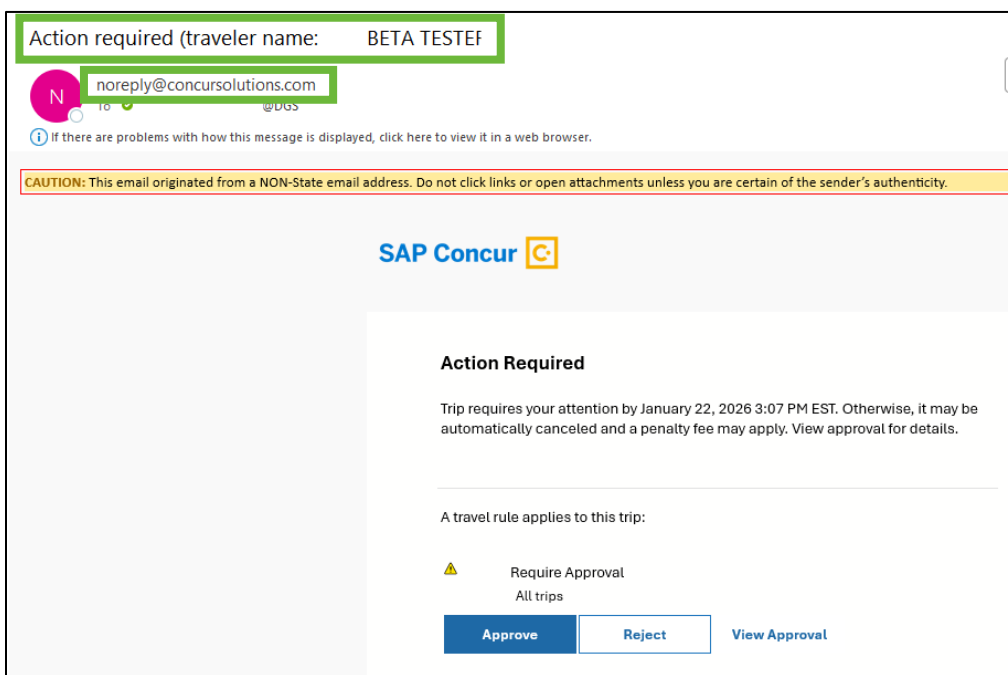
Confirmation: FPGH2Y

Payment: U.S. Bank *****)

3. Approving Manager

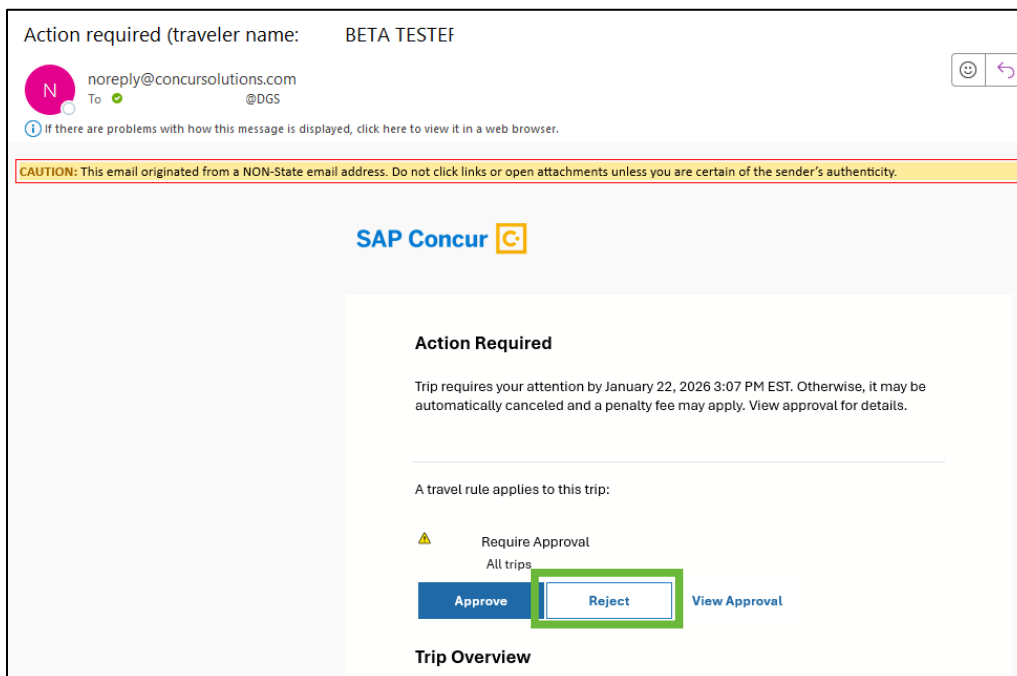
3.1 Reject Travel as an Approving Manager

Once the traveler has booked a trip, you will receive an email from Concur letting you know that action is required. The email will show an overview of the trip. You can reject the trip by responding to the email or logging into Concur.

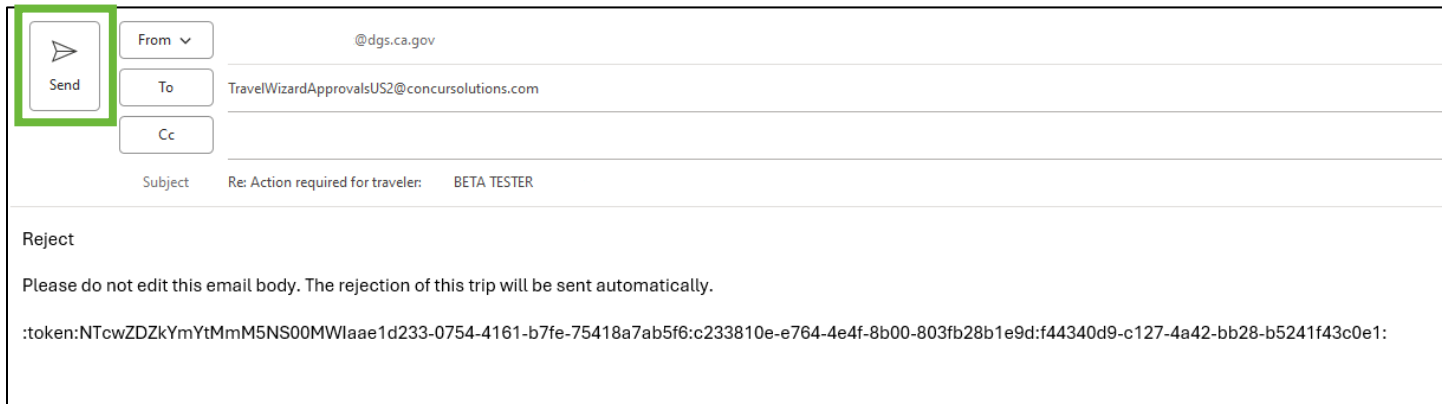


3.1.1 Reject Via Email

To reject the trip via email, simply click "Reject" within the body of the email.



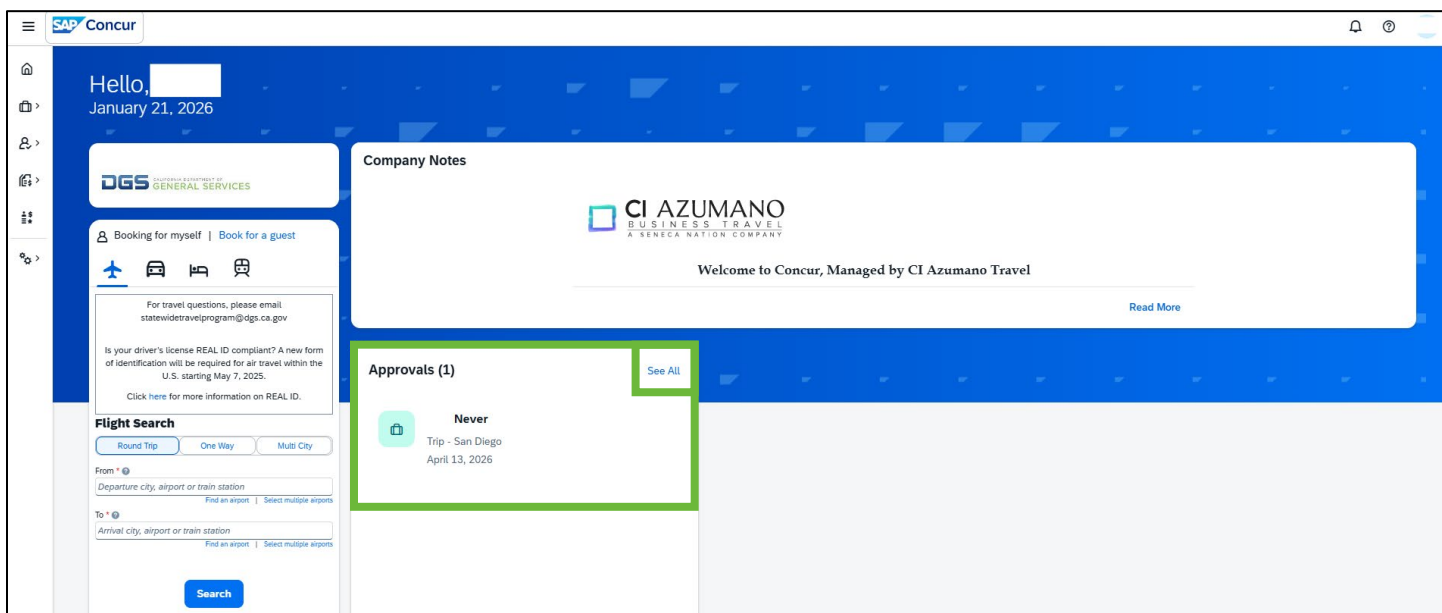
Upon clicking "Reject," a new email will open. *Do not edit anything in the email.* Click "Send" to finish rejecting the trip via email.



3.1.2 Reject Via Concur

Log into Concur. See 'How to Log into Concur' for more information.

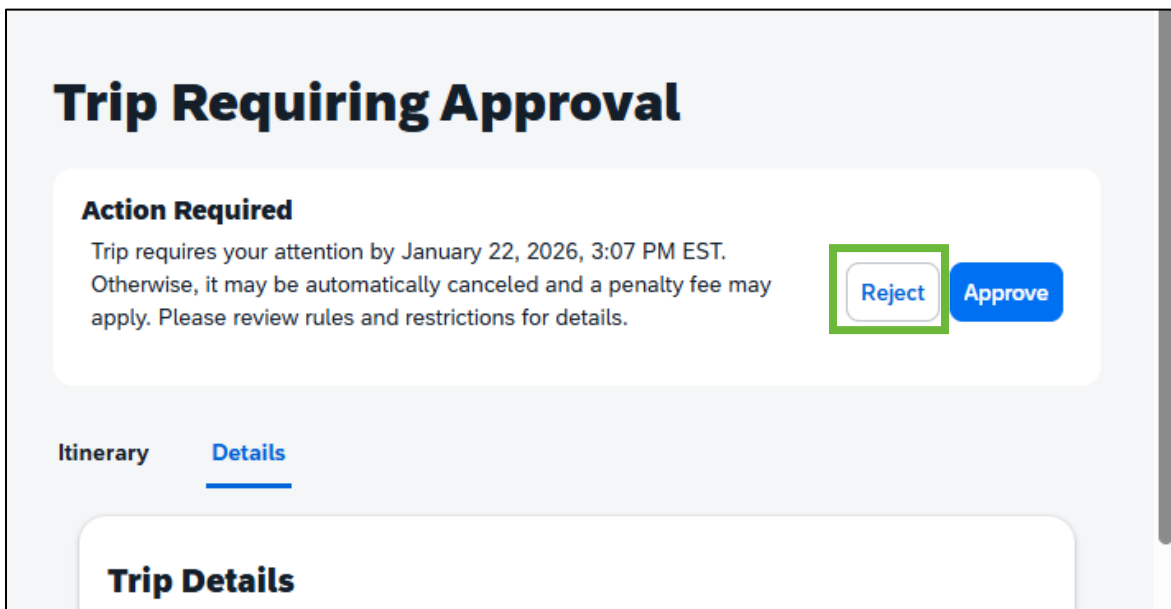
Once you've logged into Concur, you will see a notification under "Approvals." Click "See All" to load the approvals page.



On the "Approvals" page, you will see all travel that needs approval. Click the trip name to view information about the trip.

| Approvals | | | | |
|-------------------------|----------------------------------|---------|------------|-------------------------|
| Trips Awaiting Approval | | | | |
| Name | Trip Name | Locator | Booked | Travel Dates |
| BETA TESTER | Trip - San Diego | FPGQD4 | 01/21/2026 | 04/13/2026 - 04/14/2026 |

A pop-up will appear. Review the information. Click "Reject."



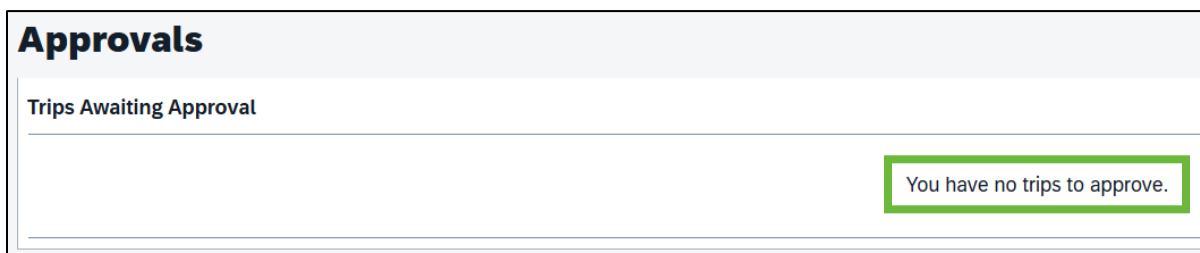
Another pop-up will appear asking for the rejection reason. This is helpful for auditing purposes. The traveler will be able to see this information when they receive a notification that their trip has been rejected.

Once you've entered the information on why the trip is being rejected, click "Reject" to finalize the rejection. If you don't want to reject the trip, click "Cancel."



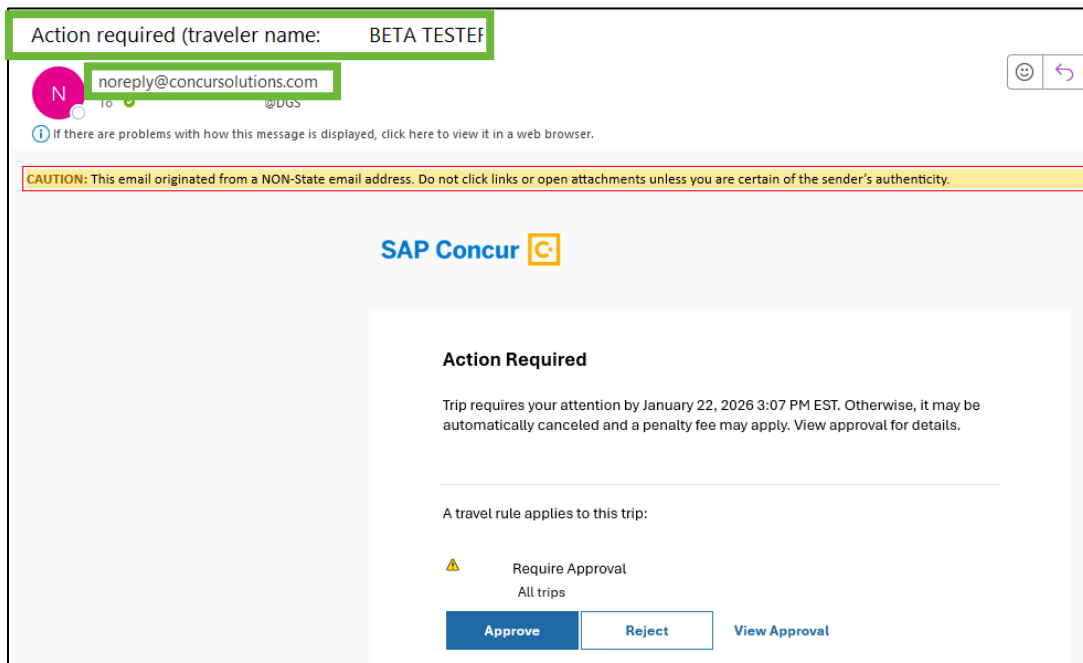
Close the pop-up.

The "Approvals" page will reload and the trip you just rejected will be gone. This means you have successfully rejected and canceled the trip.



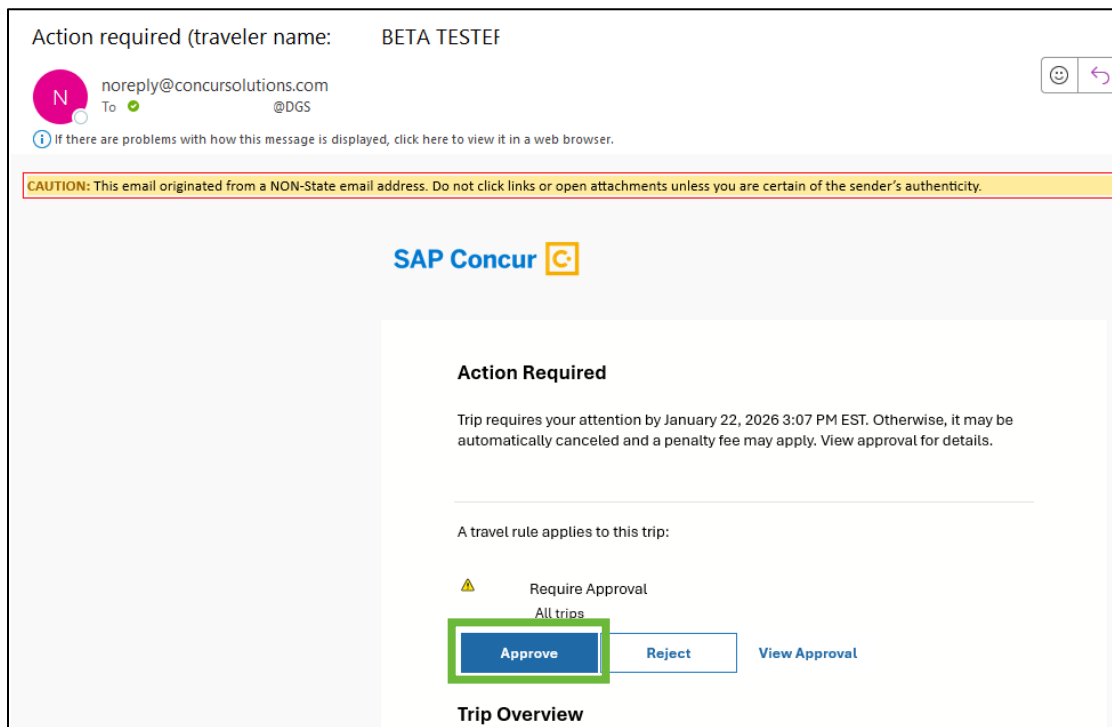
3.2 Approve Travel as an Approving Manager

Once the traveler has booked a trip, you will receive an email from Concur letting you know that action is required. The email will show an overview of the trip. You can approve the trip by responding to the email or logging into Concur.

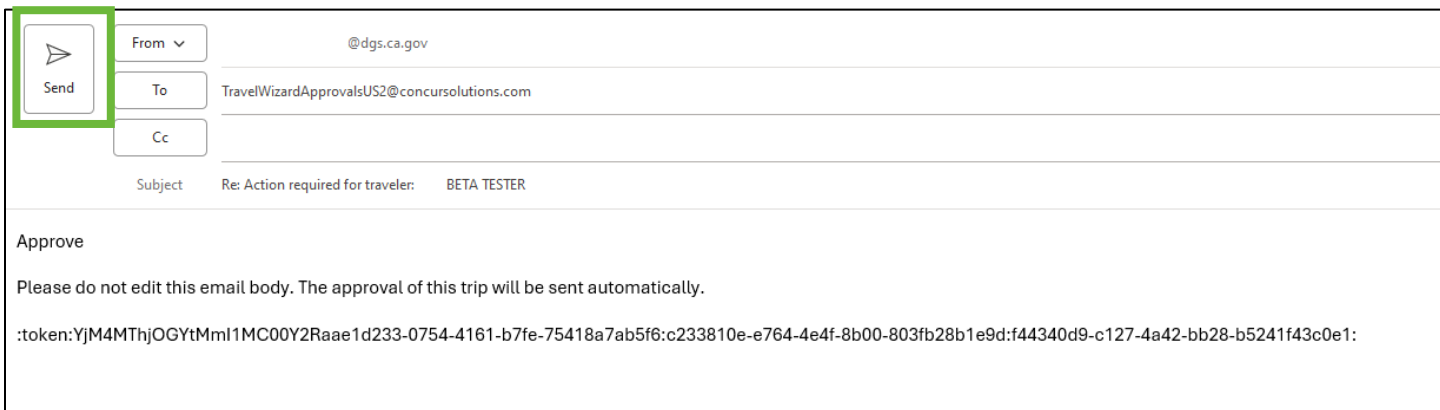


3.2.1 Approve Via Email

To approve the trip via email, simply click "Approve."



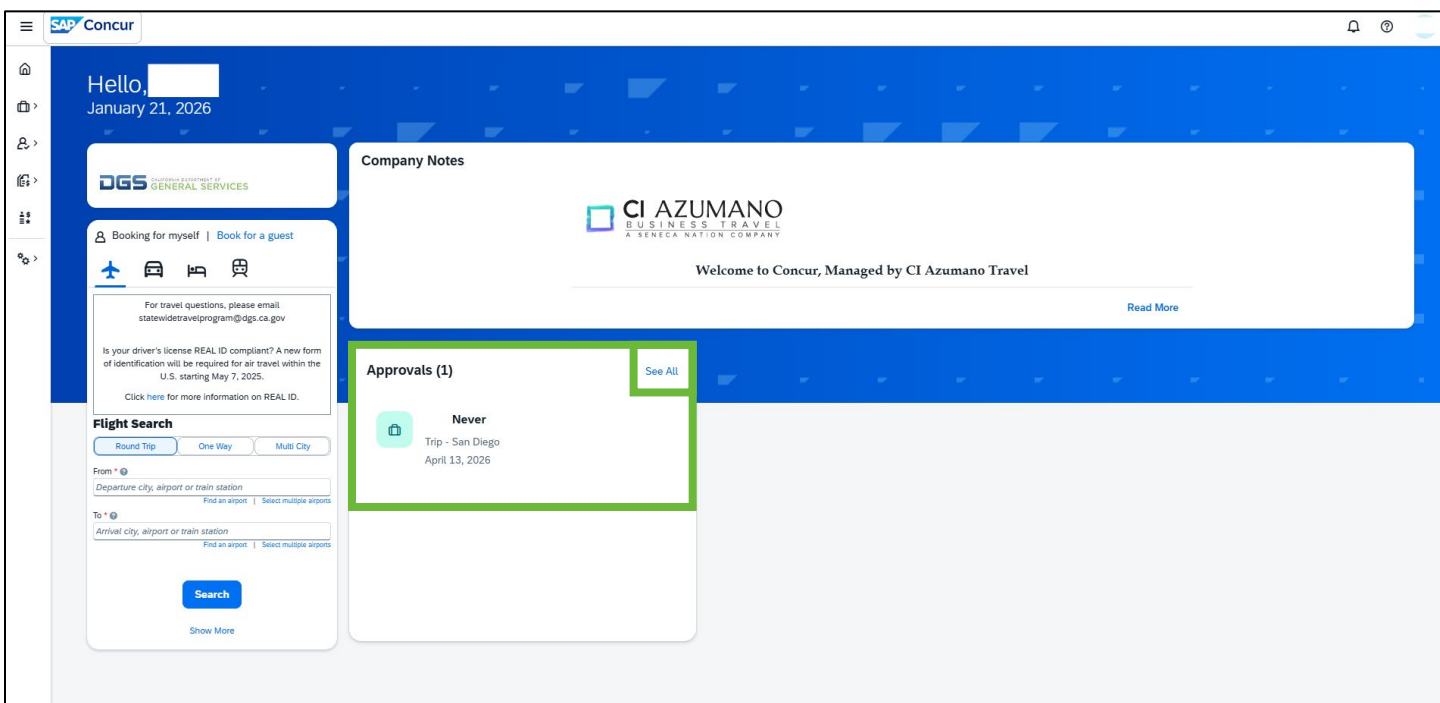
Upon clicking "Approve," a new email will open. *Do not edit anything in the email.* Click "Send."



3.2.2 Accept Via Concur

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

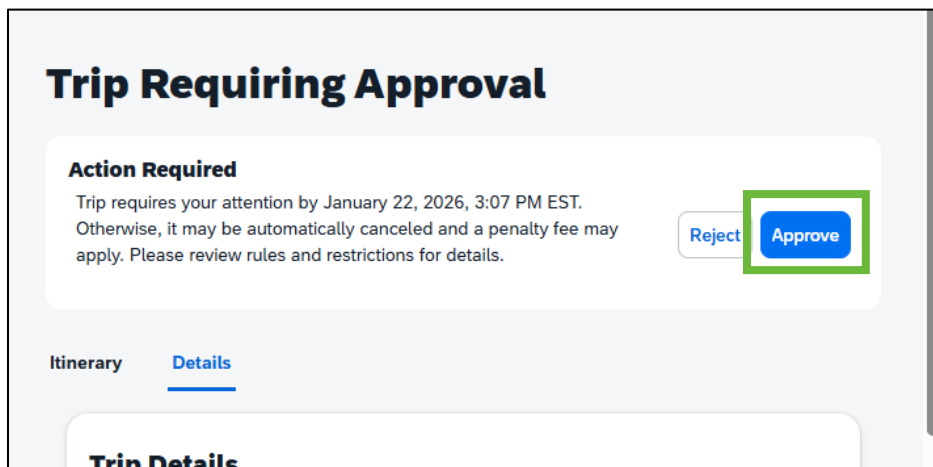
Once you've logged into Concur, you will see a notification under "Approvals." Click "See All" to load the approvals page.



On the "Approvals" page, you will see all travel that needs approval. Click the trip name to see information about the trip.

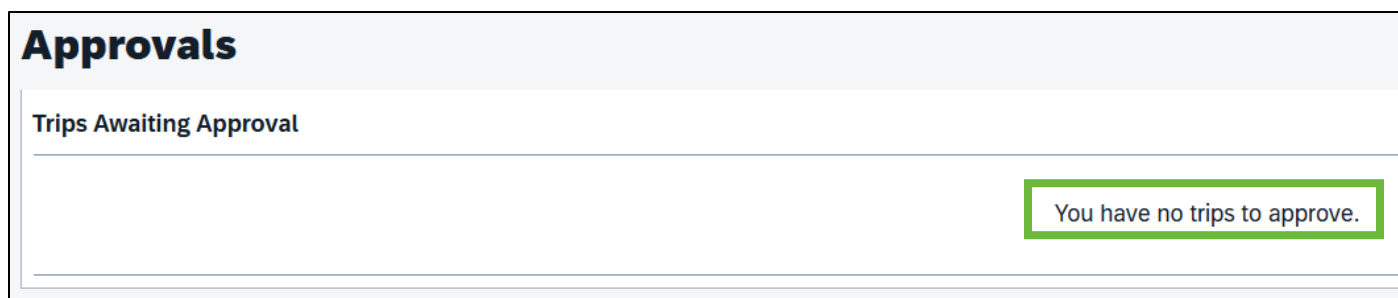
| Approvals | | | | |
|-------------------------|----------------------------------|---------|------------|-------------------------|
| Trips Awaiting Approval | | | | |
| Name | Trip Name | Locator | Booked | Travel Dates |
| BETA TESTER | Trip - San Diego | FPGQD4 | 01/21/2026 | 04/13/2026 - 04/14/2026 |

A pop-up will appear. Review the information. Click “Approve.”



Close the pop-up.

The “Approvals” page will reload and the trip you just accepted will be gone. This means you have successfully accepted and confirmed the trip.



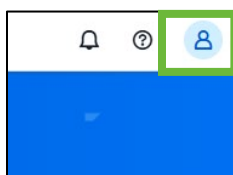
3.3 Travel Vacation Reassignment

If you are out of office for more than one day, it is a best practice to turn on “Travel Vacation Reassignment” so your travel requests go to your back-up approving manager.

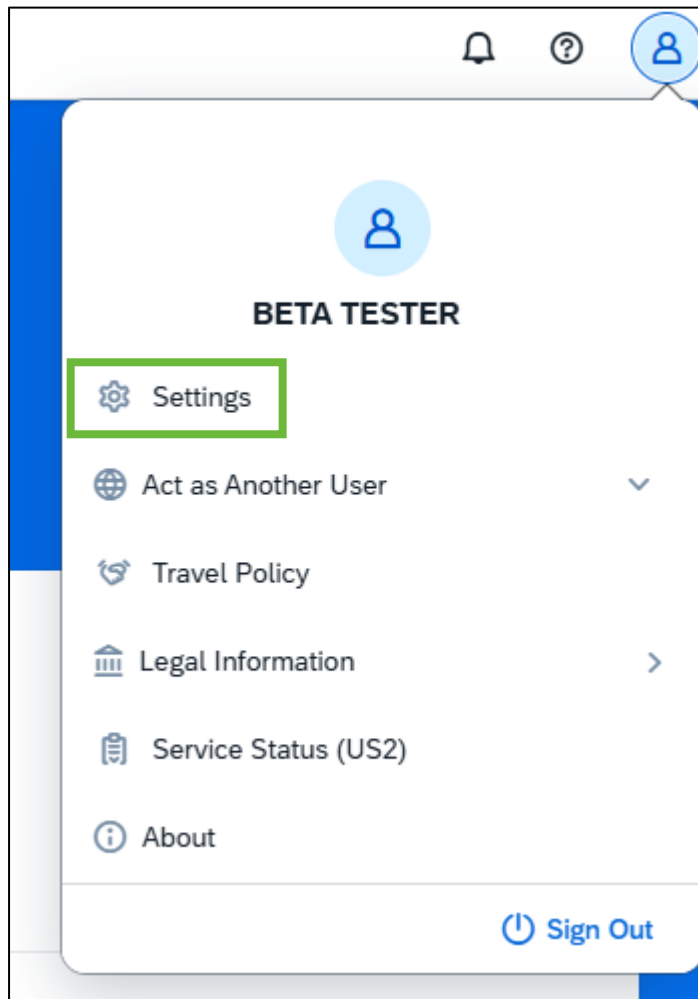
If you are out of office and did not assign a back-up approving manager, the traveler will need to reach out to the agency Travel Coordinator(s) to assign the trip to another approving manager. *CI Azumano and the Statewide Travel Program do not have the ability to approve travel on behalf of an agency.*

Log into Concur. See the video and/or guide ‘How to Log into Concur’ for more information.

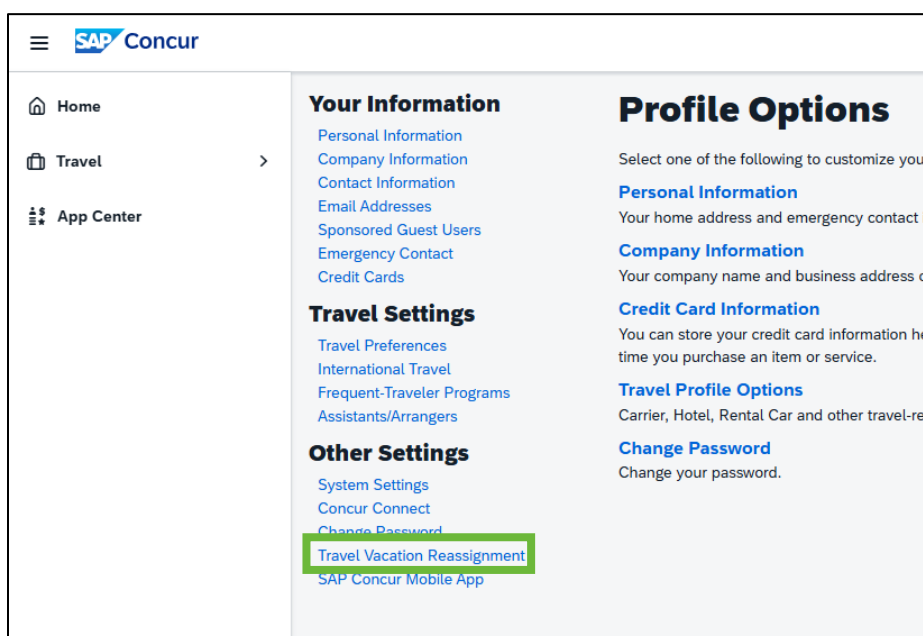
After logging in, click on the icon in the top right corner.



Click "Settings" to edit or view your profile.



Click "Travel Vacation Reassignment."



Type the name of the approving manager who will review travel requests while you are gone. Choose the approving manager from the drop-down menu.

Note: The individual must have a Concur account to appear in the drop-down menu.

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, Concur

Never, Concur
Concur Administrator
Dept of General Services
@xdgs.ca.gov
(User Name)
@concur.com (Email)

Never, Concur Admin
Concur Administrator
Dept of General Services
@dgs.ca.gov.1
(User Name)
@concur.com (Email)

Click "Submit."

Travel Vacation Reassignment

Choose a person in your company who will handle travel approvals assigned to again.

Note 1: If your designated backup manager goes on vacation while you are also

Note 2: This will **not** reassign any items currently in your approval queue; pleas

Never, William

A pop-up will appear to confirm you want to assign this person as a back-up approving manager. Click "OK."

us2.concursolutions.com says

You have designated a backup manager. All travel approvals ordinarily assigned to you will be routed through this manager until you come to this page and clear the backup manager. Do you wish to proceed?

You will know you were successful because the page will reload with a green box that says, 'Profile Saved.'

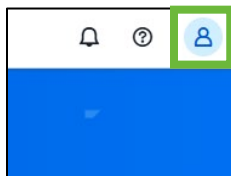
| | | | |
|--|--|---|-----------------------------|
| <p>Your Information</p> <ul style="list-style-type: none"> Personal Information Company Information Contact Information Email Addresses Sponsored Guest Users Emergency Contact Credit Cards <p>Travel Settings</p> <ul style="list-style-type: none"> Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers <p>Other Settings</p> <ul style="list-style-type: none"> System Settings Concur Connect Change Password Travel Vacation Reassignment SAP Concur Mobile App | <p>Profile Options</p> <p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>Credit Card Information You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Change Password Change your password.</p> | <p>System Settings Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>SAP Concur Mobile App Set up access to Concur on your mobile device</p> | <p>Profile Saved</p> |
|--|--|---|-----------------------------|

3.4 Remove a Back-up Approving Manager

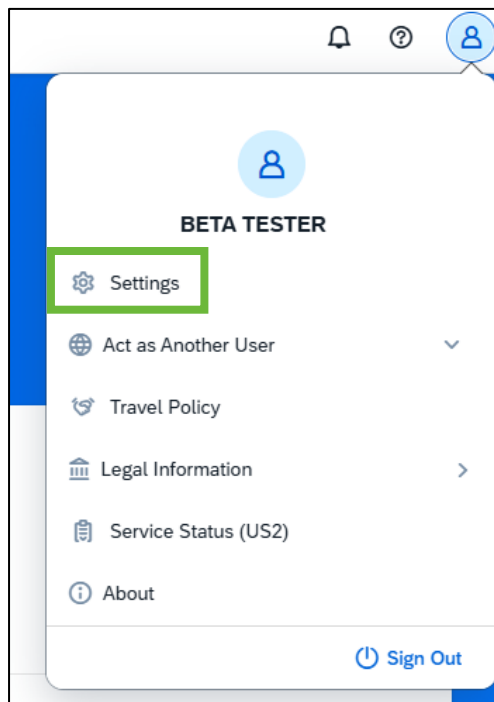
Once you have returned to work, you need to remove the back-up approving manager.

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

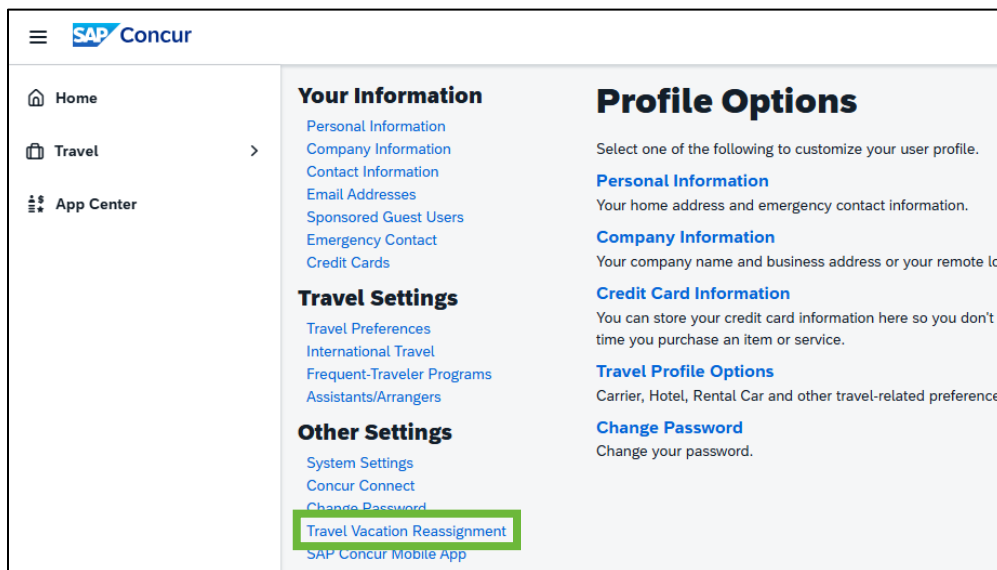
After logging in, click on the icon in the top right corner.



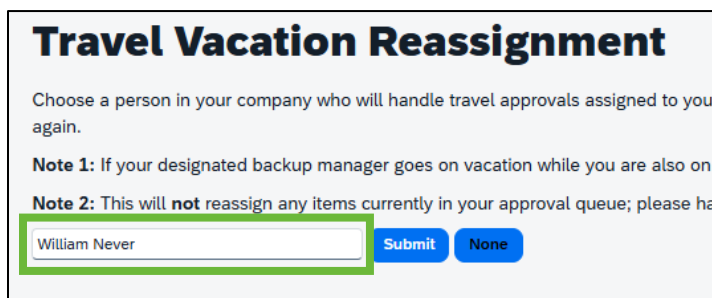
Click "Settings" to edit or view your profile.



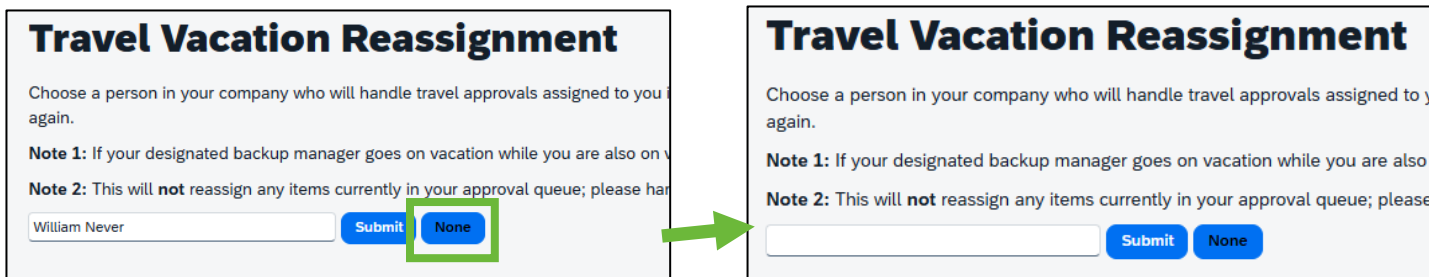
Click "Travel Vacation Reassignment."



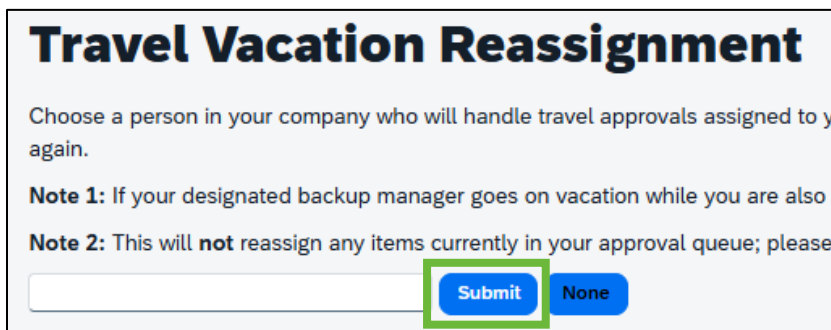
You will see the back-up approving manager's name in the box.



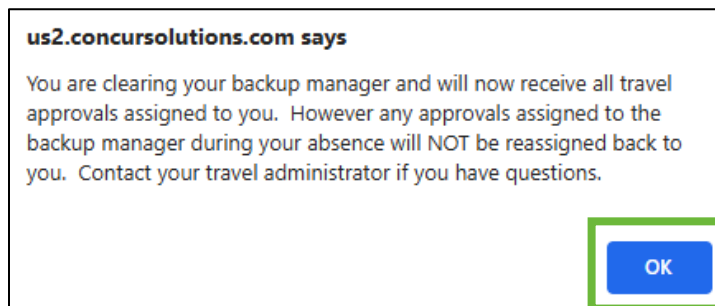
Click 'None.' The back-up approving manager's name will disappear.



Click "Submit."



A pop-up will appear to let you know that any travel arrangements made while the backup approving manager was overseeing travel approvals will need to be approved by that person. Click "OK."



You will know you were successful because the page will reload with a green box that says, "Profile Saved."

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Sponsored Guest Users
- 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
- SAP Concur Mobile App

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Change Password
Change your password.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

SAP Concur Mobile App
Set up access to Concur on your mobile device

Profile Saved

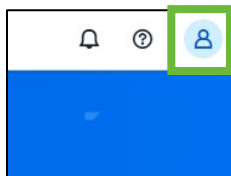
4. What to do if...

4.1 Your Approving Manager is Not Accurate in Concur

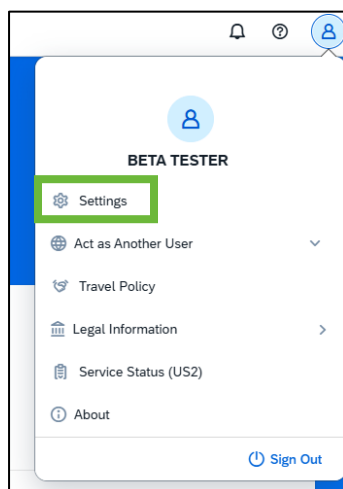
If your agency participates in pre-trip approvals in Concur, your approving manager must approve a trip before it can be confirmed. It is important that your approving manager is listed accurately in Concur, or your travel could be canceled.

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

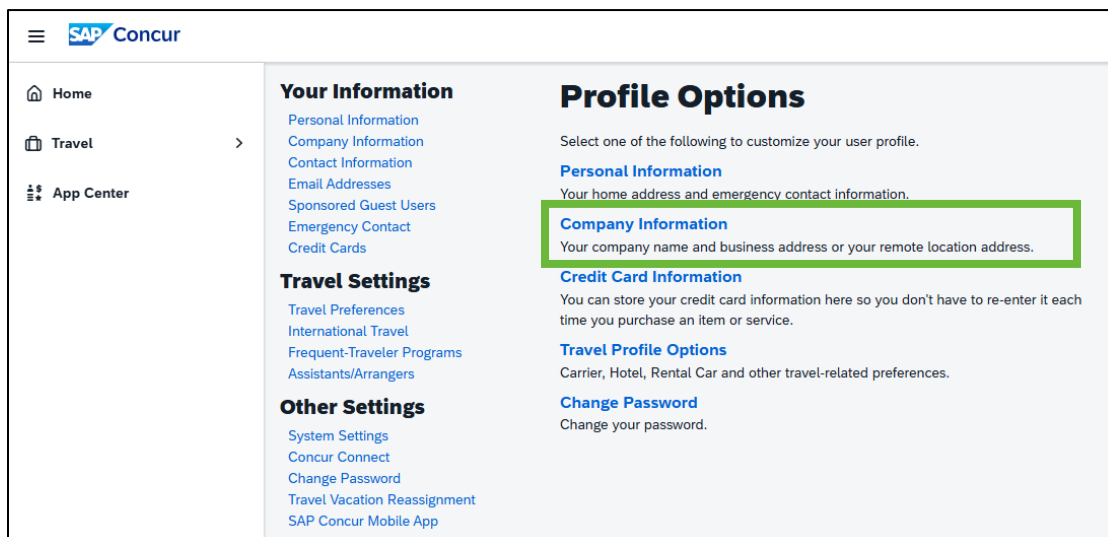
After logging in, click on the icon in the top right corner.



Click "Settings" to edit or view your profile.



Click "Company Information."



Find "Company Information." Check the "Manager" box to see who has been assigned as an approving manager for your account.

Company Information

Employee ID

Manager Org. Unit/Division Employee Position/Title

Fiscal Reporting Structure **[Required]**


If the information is accurate, continue to book travel as normal.


To add or edit your approving manager in Concur, please reach out to your agency Travel Coordinator(s). *You will not be able to change your approving manager in Concur.*

4.2 Your Trip Has Been Rejected


If you have submitted a trip and your manager has rejected it, you will receive an email from Concur notifying you of the cancellation. The email will include the trip name, rejection date, who rejected it, and reason for rejection.

Trip Rejected - Action Required. Trip - San Diego

 noreply@concursolutions.com
To: [redacted] @BBS

 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.



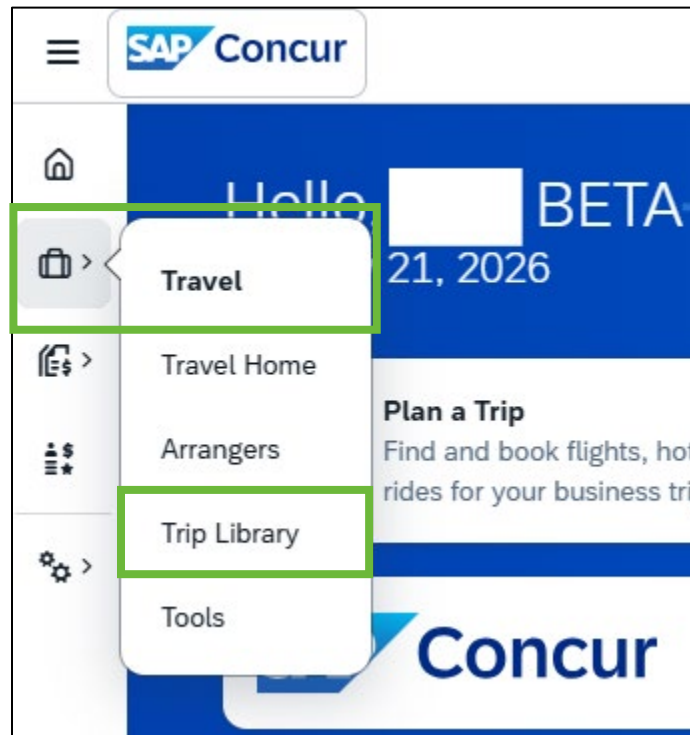
! Trip Rejected - Action Required

Your trip was rejected on January 21, 2026 (approver: John Manager). Please view the latest trip status. You may be able to manually cancel your trip in case it doesn't get auto-canceled.

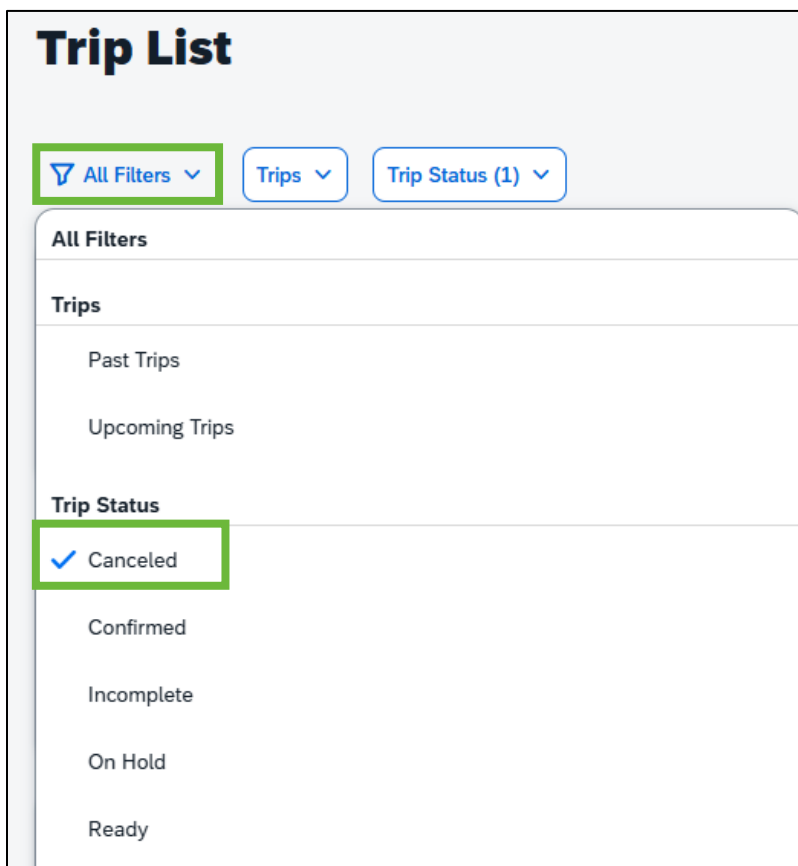
Rejection Reason: training

[View Trip Status](#)

You can review the trip in Concur. Once you've logged into Concur, click "Travel," "Trip Library."



Within your "Trip Library," you can see all trips you have booked. Click "All Filters," then select "Canceled" to see canceled and rejected trips.



Find the trip you would like to review. Click "View Trip Details."

Trip - San Diego

Tuesday, April 21, 2026 - Thursday, April 23, 2026

Record Locator: FPGYP6

Canceled

[View Trip Details](#)

Review the information. Click "Trip History" to see who rejected the travel and any notes they added.

Trip Overview

| Trip Status | Record Locator | Trip Name | Date |
|--|----------------|------------------|---------------------------------|
| Canceled | FPGYP6 | Trip - San Diego | April 21, 2026 - April 23, 2026 |

Itinerary
Details
Trip History

January 21, 2026

Booking Canceled BETA TESTER | 6:04 PM EST

⊘ Canceled hotel: SUPER 8 BY WYNDHAM SAN DIEGO HOTEL, SAN DIEGO

Cancellation: 87508EE099796X

Sent to Agency for Cancellation BETA TESTER | 6:04 PM EST

⊘ Booking canceled.

Trip Canceled BETA TESTER | 6:04 PM EST

Trip Rejected | 6:04 PM EST

⊗ Your trip was rejected on January 21, 2026 [approver: John Manager].

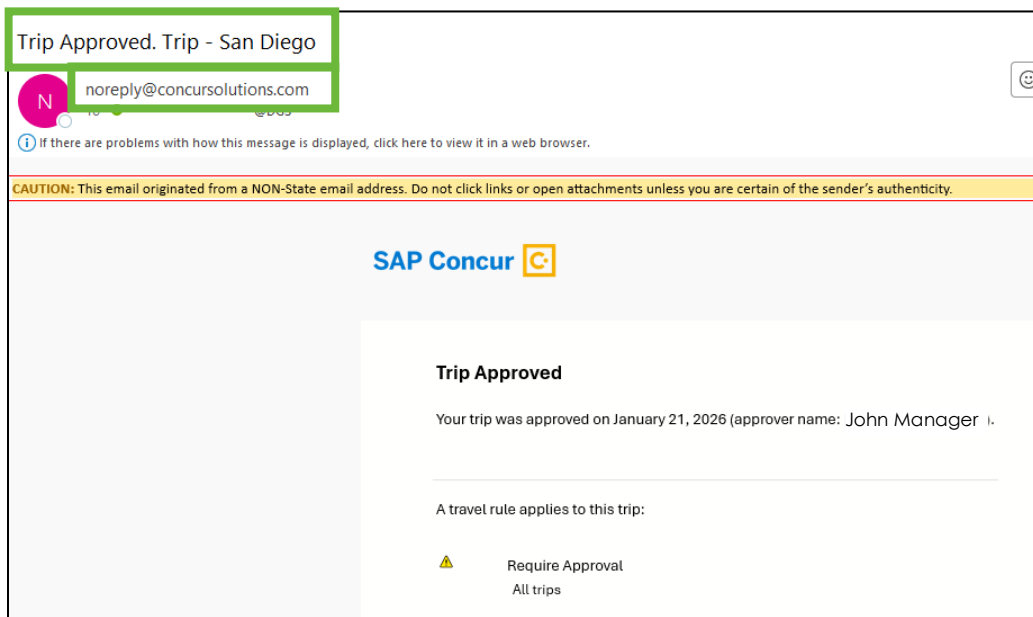
Rejection Reason
training

Note: If your approving manager is out of office and did not assign a backup approving manager to approve travel while they're out, you will need to reach out to your agency Travel Coordinator(s) to assign the trip to another approving manager.

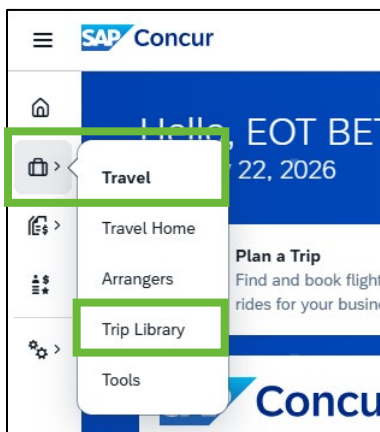
CI Azumano and the Statewide Travel Program do not have the ability to approve travel.

4.3 Your Trip Has Been Approved

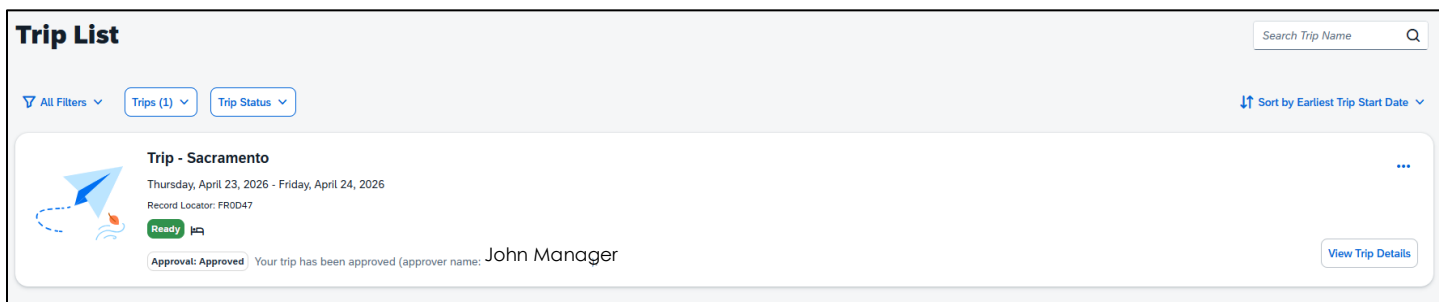
If your manager approves a submitted trip, you will receive an email notification from Concur. The email will include the trip name, approval date, approving manager's name, and any comments added.



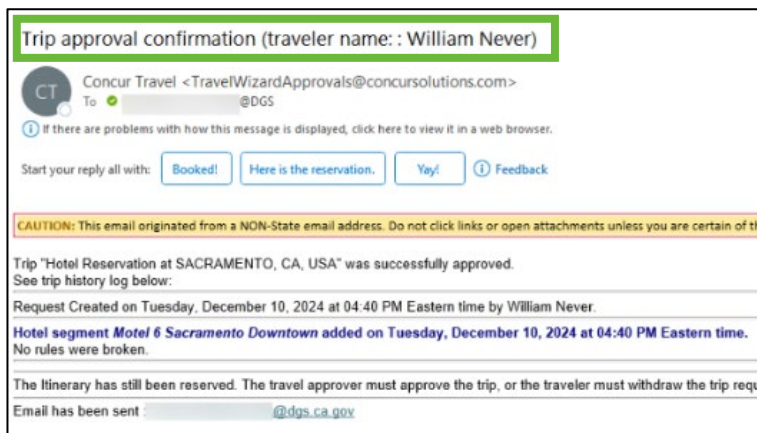
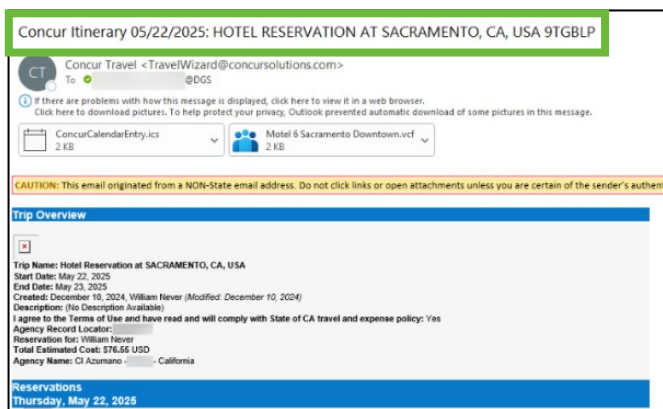
You can also review the trip in Concur. Once you've logged into Concur, click "Travel," "Trip Library."



When the "Trip List" page loads, you can see all trips you have booked.

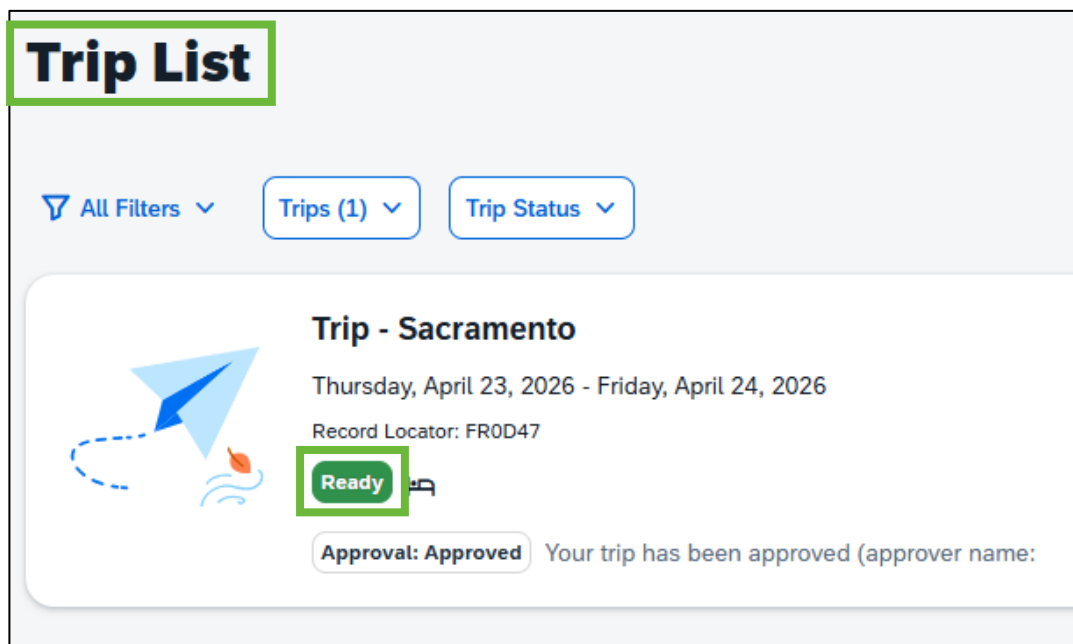


You will receive two additional emails from Concur. The first will be the trip itinerary and the second will be confirmation of a purchased trip. No further action is needed for the approved and confirmed trip.



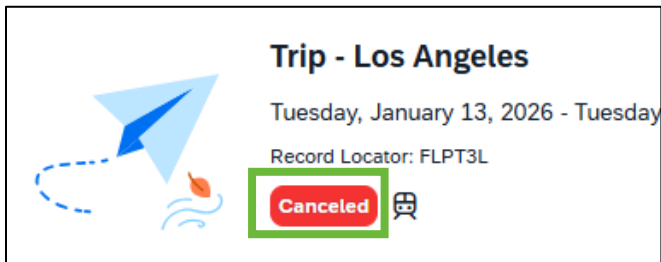
4.4 You Don't Know the Status of Your Trip

When the "Trip List" page loads, you can see all trips you have booked. Under the trip name and record locator, you can see the trip status.

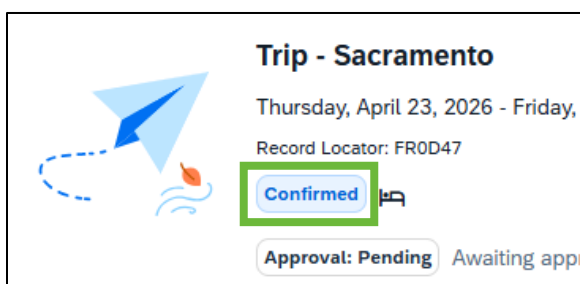


The status will tell you if the trip is:

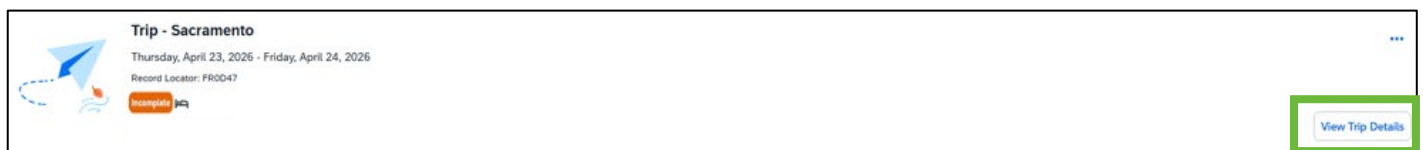
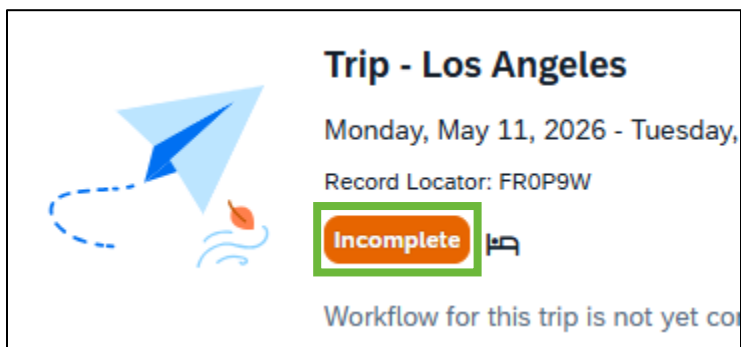
- o Canceled: All travel segments have been canceled by the traveler or approving manager.



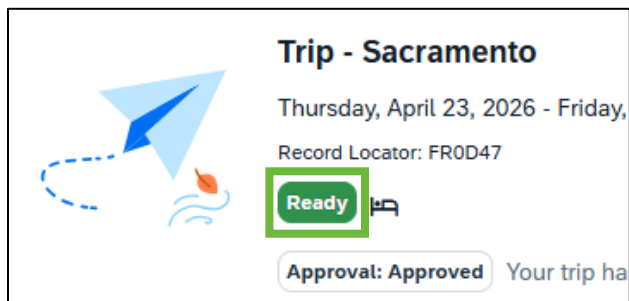
- o Confirmed: All travel segments have been booked, but not ticketed due to pending manager approval.







- o Incomplete: All travel segments have not been completed. Click "View Trip Details" to complete the booking.



- o Ready: All travel segments have been booked and ticketed.





Under the status of the trip, you will see the approval status.

| | |
|--|--|
|  <p>Trip - Sacramento Thursday, April 23, 2026 - Friday, Record Locator: FR0D47 Confirmed  Approval: Pending Awaiting app</p> |  <p>Trip - Sacramento Thursday, April 23, 2026 - Friday, Record Locator: FR0D47 Ready  Approval: Approved Your trip ha</p> |
|--|--|

For any trip, click "View Trip Details" to see detailed information.

Trip List Search Trip Name

All Filters Trips (1) Trip Status Sort by Earliest Trip Start Date

 **Trip - Sacramento**
Thursday, April 23, 2026 - Friday, April 24, 2026
Record Locator: FR0D47
Ready 
Approval: Approved Your trip has been approved (approver name: John Manager) **View Trip Details**

5. Additional Resources

As a traveler, your first resource for all travel-related inquiries is your agency Travel Coordinator(s). Other helpful resources are:

5.1 CI Azumano

Email: CalTravel@ciazumano.com

Travel Agents: (877) 454-8785 (use only if trip is in progress)

- [CI Azumano Travel Tools and Resources](#)
- [CI Azumano Webpage](#)
- [Concur Login Page](#)

5.2 Statewide Travel Program

Email: StatewideTravelProgram@dgs.ca.gov

Find the following videos and guides on the [Statewide Travel Program Training Resources Page](#):

- How to Assist or Arrange a Trip
- How to Book a Rental Car
- How to Book a Train
- How to Book Air
- How to Book Lodging
- How to Log into Concur
- How to Set up a Profile in Concur