

# **Travel Approval**

Statewide Travel Program



#### Content

1.	Ger	neral Information	3
2.	Турє	es of Travel Approval	4
	2.1	Passive Approval Process	4
	2.2	Hard-Stop Approval Process	5
	2.3	Both Processes	
3.	Reje	ecting and Approving Travel as a Manager	7
	3.1	How to Reject Travel as a Manager	
	3.2	How to Approve Travel as a Manager	9
4.	Trav	el Vacation Reassignment	
	4.1	Assign a Back-up Manager	12
	4.2	Remove a Back-up Manager	13
5.	Who	at to do if your trip has been rejected or approved	16
	5.1	What to do if your trip has been rejected	16
	5.2	What to do once your trip has been approved	18
6.	Trip	Request Status	20
7	Add	litional Resources	21

# 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).

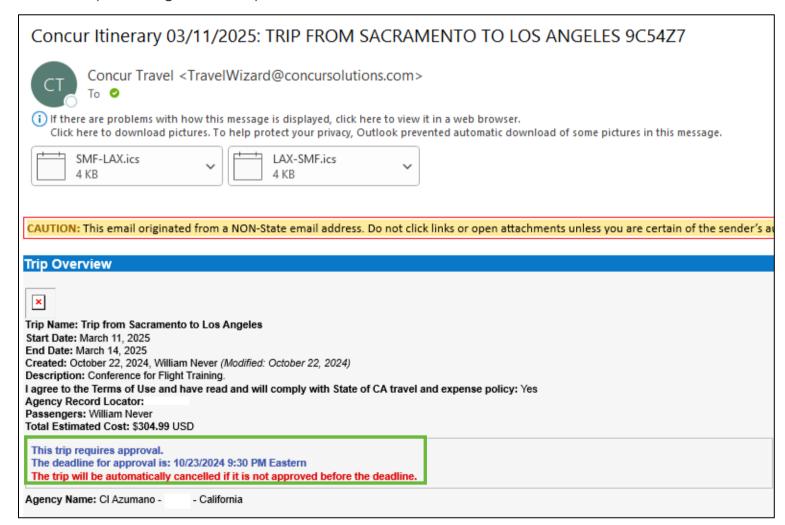
# 2. Types of Travel Approval

There are two types of approval processes through Concur: Passive Approval and Hard-Stop Approval.

### 2.1 Passive Approval Process

When a traveler books a trip and it requires passive approval, then the approver will have to actively <u>REJECT</u> the trip if they don't want the trip to occur. The trip will be <u>approved</u> automatically if the approver takes no action.

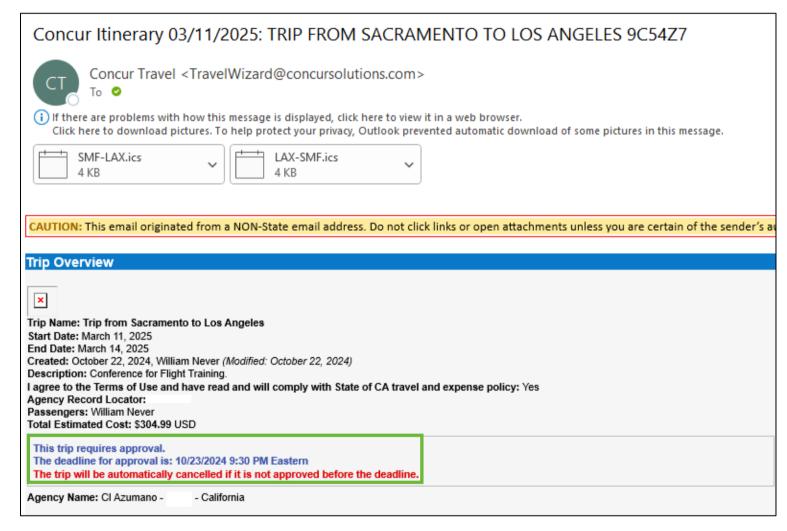
**Note:** The passive approval process is subject to a ticketing deadline. You can find the approval deadline by checking the itinerary email Concur sends, as seen in the screenshot below.



# 2.2 Hard-Stop Approval Process

When a traveler books a trip and it requires approval, then the approver will have to actively <u>APPROVE</u> the trip if they want the trip to occur. The trip will be <u>rejected</u> automatically if the approver takes no action or rejects the trip.

**Note**: The hard-stop approval process is subject to a ticketing deadline. You can find the approval deadline by checking the itinerary email Concur sends, as seen in the screenshot below.

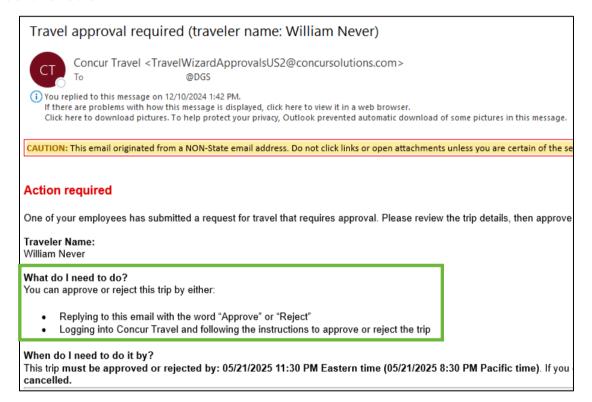


#### 2.3 Both Processes

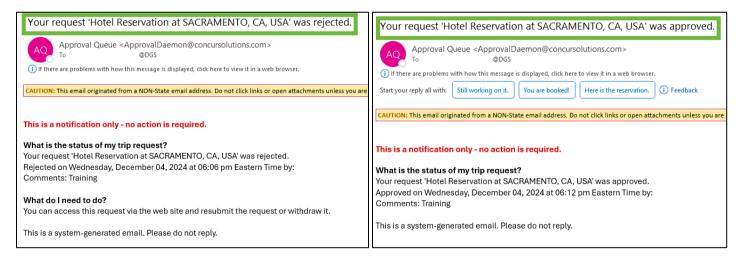
The following applies to both the Passive and the Hard-Stop Approval Processes:

- The approval deadline is shown on the itinerary when the traveler submits the request.
- It is recommended to communicate with your manager before and after booking a trip, so they promptly take action to approve or reject the trip.
- All rules and cancellation penalties apply once the reservation is sent for approval. For example, if you booked a hotel for check-in tomorrow with a 48-hour cancellation period, the card will be charged.

- Flights are on hold until the trip has been approved; meaning that the price may increase or decrease once the approval is received.
- For hotel reservations using a virtual card, the card will deploy regardless of if a trip has been approved or rejected. The virtual card is deployed to hold the room. If the trip is rejected or cancelled, the charges should be reversed.
- Trips can be approved or rejected by logging into Concur online, or via email, as seen by the screenshot below.



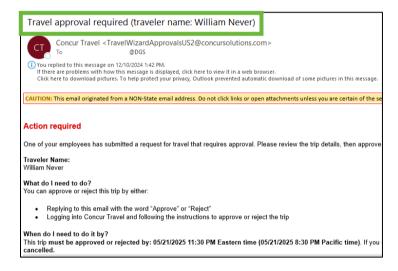
 Travelers will receive an email indicating whether their trip was approved or rejected. It will also appear on their Concur home page under "Upcoming Trips."



# Rejecting and Approving Travel as a Manager

# 3.1 How to Reject Travel as a Manager

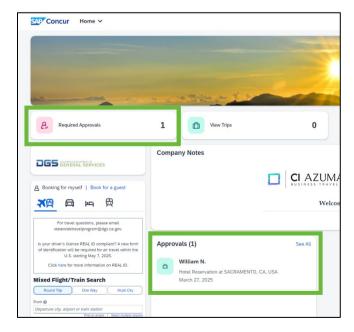
Once the traveler has booked a trip, you will receive an email from Concur letting you know that action is required. The email will show an overview of the trip. You can reject the trip by responding to the email or logging into Concur.



To reject the trip via email, simply respond to the 'Travel approval required' email from Concur with the word, "Reject."

To reject the trip on Concur, follow these steps:

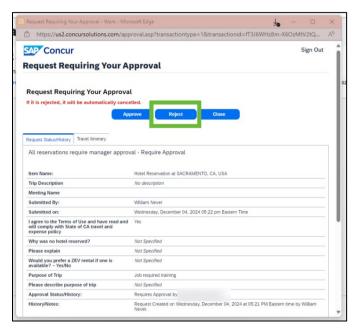
1. Once you've logged into Concur, you will see a notification under 'Required Approvals.' Click the 'Required Approvals' or 'Traveler Name' link.



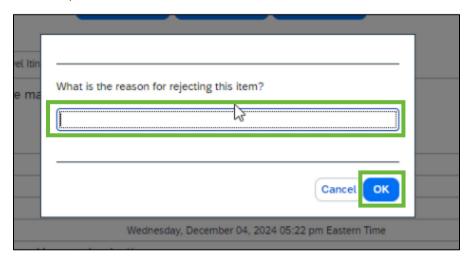
2. On the 'Approvals' page, you will see a list of travel that needs approval. Click the trip link of the trip you would like to reject.



3. Review the trip information in the pop-up. Click 'Reject.'



4. Once you click 'Reject,' a pop-up will appear asking, "What is the reason for rejecting this item?" 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 as to why the trip has been rejected, click 'OK' to finalize the rejection. If you don't want to reject the trip, click 'Cancel.'



Once you've clicked 'OK,' the 'Approvals' page will reload and the trip you just rejected will be gone. This means you have successfully rejected and cancelled the trip.

Approvals		
Trips Awaiting Approval		
	You have no trips to approve.	

# 3.2 How to Approve Travel as a Manager

Once your traveler has booked a trip, you will receive an email from Concur Travel 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.

#### Travel approval required (traveler name: William Never)



Concur Travel <TravelWizardApprovalsUS2@concursolutions.com>

(i) You replied to this message on 12/10/2024 1:42 PM.

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

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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

#### Action required

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

#### Traveler Name:

William Never

#### 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

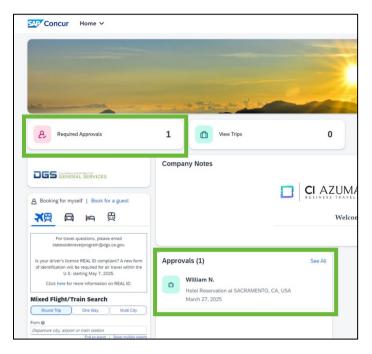
#### When do I need to do it by?

This trip must be approved or rejected by: 05/21/2025 11:30 PM Eastern time (05/21/2025 8:30 PM Pacific time). If you cancelled.

To approve the trip via email, simply respond to the 'Travel approval required' email from Concur with the word, "Approve."

To approve the trip on Concur, follow these steps:

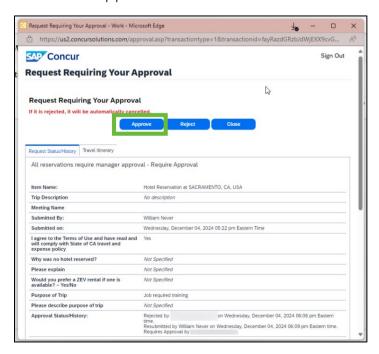
1. Once you've logged into Concur, you will see a notification under 'Required Approvals.' Click the 'Required Approvals' or 'Traveler Name' link.



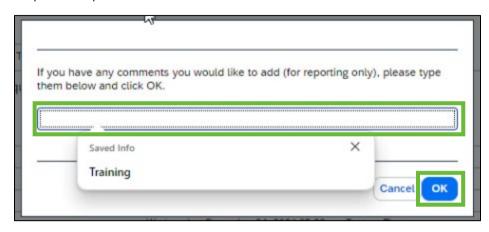
2. Here, you will see a list of travel that needs approval. Click the trip link.



3. Review the information. Click 'Approve.'



4. Once you click 'Approve,' a pop-up will appear saying, "If you have any comments you would like to add (for reporting only), please type them below and click 'OK.' This is helpful for reporting purposes. The traveler will see any comments entered. Once you've entered the information as to why the trip has been accepted, click 'OK' to finalize the travel. If you don't want to accept the trip, click 'Cancel.'



If you've clicked 'OK,' the 'Approvals' page will reload and the trip you just accepted will be gone. This means you have successfully accepted the trip.



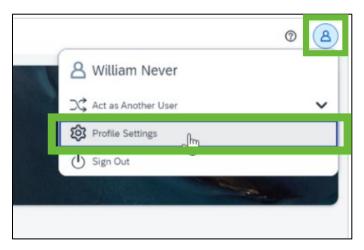
# 4. Travel Vacation Reassignment

If you are out of office and did not assign a manager to approve travel while you're out, the traveler will need to reach out to the agency Travel Coordinator(s) to assign the trip to another manager. Cl Azumano and DGS Statewide Travel Program do not have the ability to approve travel on behlf of the agency.

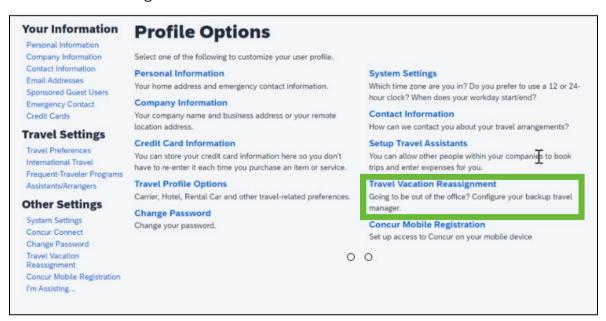
# 4.1 Assign a Back-up Manager

If you will be out of office for more than one day, it is recommended to assign a manager in your place to approve travel.

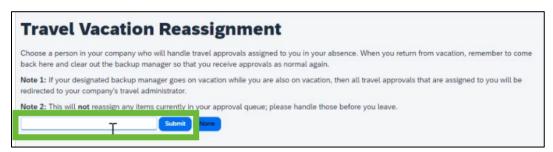
Once you have logged into Concur, click the circle at the top right corner of the page and select 'Profile Settings.'



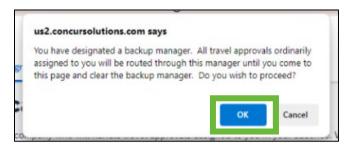
Click 'Travel Vacation Reassignment.'



Type the name of the manager who will review travel requests while you are gone. Choose the manager from the drop-down menu and click 'Submit.' Please note: The manager must have an account on Concur to show up in the drop-down menu.



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



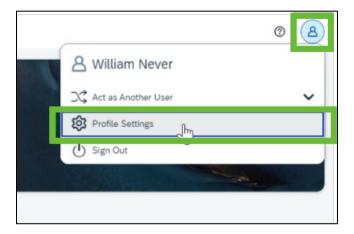
You will know you were successful because the page will reload with a green box that says, 'Profile Saved.'



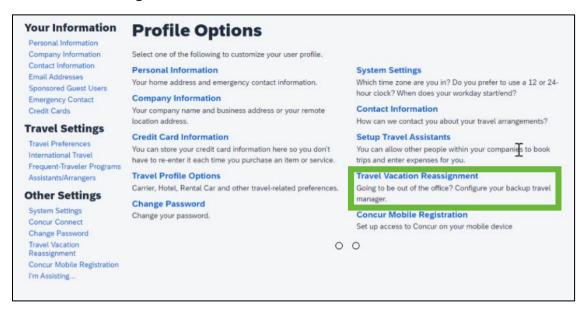
# 4.2 Remove a Back-up Manager

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

Log into Concur and click the circle at the top right corner of the page and select 'Profile Settings.'



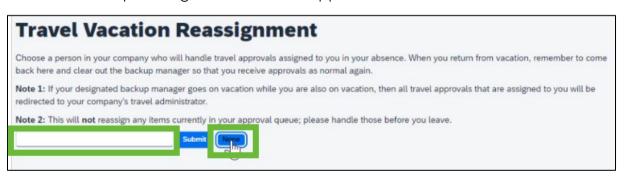
#### Click 'Travel Vacation Reassignment.'



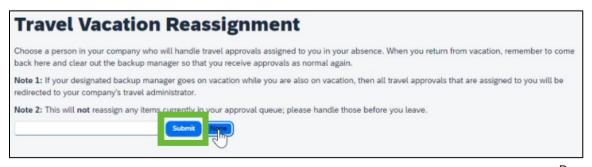
You will see the back-up manager's name in the box.

# 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. Concur Never

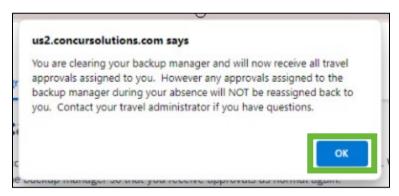
Click 'None.' The back-up manager's name will disappear.



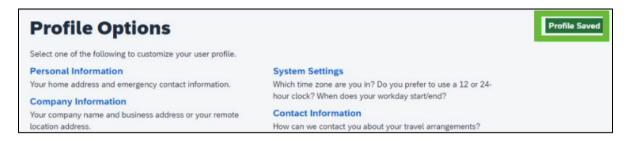
#### Click 'Submit.'



A pop-up will appear to let you know that any travel arrangements made while the backup 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.'

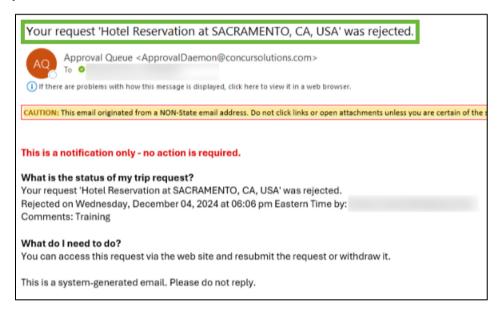


# 5. What to do if your trip has been rejected or approved

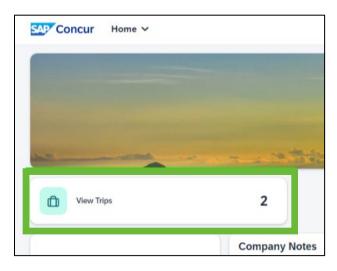
If your agency participates in pre-trip approvals in Concur, your manager will have to approve the trip before the trip is confirmed. It is important that your manager is listed accurately in Concur, or your travel could be cancelled. To add or edit your manager on Concur, please reach out to your agency Travel Coordinator(s).

# 5.1 What to do if your trip has been rejected

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



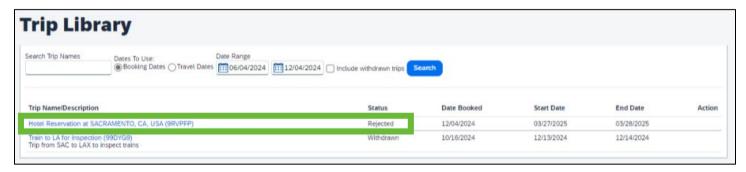
You can review the trip and resubmit or withdraw it on Concur. Once you've logged into Concur, click 'View Trips.'



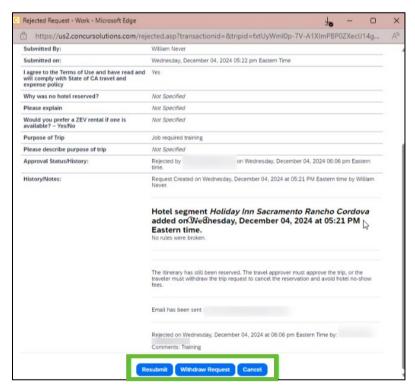
Within your 'Trip Library' page, you can see all trips you have booked. The status will tell you if the trip has been rejected, confirmed, withdrawn, or if the trip is awaiting approval.



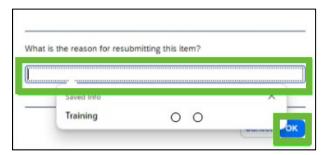
Click the rejected trip.



In the pop-up, review the trip information. At the bottom of the pop-up, you can click 'Resubmit' to push the trip back your manager for approval, 'Withdraw Request' to delete the trip, or 'Cancel' to do nothing.



If you click 'Resubmit,' a pop-up will appear asking, "What is the reason for resubmitting this item?" Please note that you cannot make any changes to the trip this way. This should only be used if the trip was rejected on accident, or if your manager did not approve the trip in time. Once you've entered the reason for resubmitting the trip, click 'OK.'



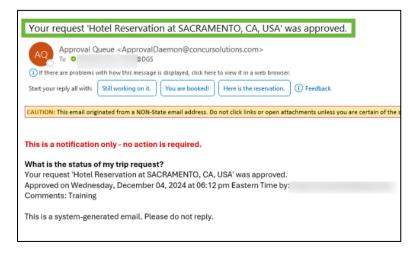
When the 'Trip Library' page reloads, you will see the status has changed from 'Rejected' to 'Awaiting Approval.' Also listed is your manager and the approval deadline. It is recommended to communicate with your manager so they promptly take action to approve or reject the trip.



If your manager is out of office and did not assign a manager to approve travel while they're out, you will need to reach out to your agency Travel Coordinators to assign the trip to another manager. Cl Azumano and DGS Statewide Travel Program do not have the ability to approve travel.

## 5.2 What to do once your trip has been approved

If you have submitted a trip and your manager has approved it, you will receive an email from Concur to notify you that the trip has been approved. The email will include the trip name, approval date, who approved it, and any comments left by the approver.



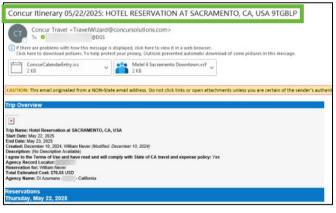
You can also review the trip on Concur. Once you've logged into Concur, click 'View Trips.'

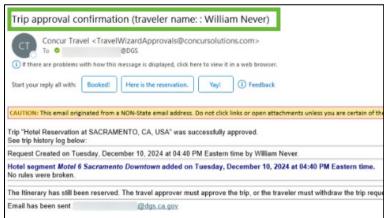


Within the 'Trip Library' page, you can see all trips you have booked. The status will tell you if the trip has been rejected, confirmed, withdrawn, or if the trip is awaiting approval.



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.





# 6. Trip Request Status

Awaiting Approval: Trip is waiting to be approved.

Awaiting Ticketing: Air tickets have not been issued, but the car/hotel has been reserved.

<u>Ticketed/Reserved</u>: Air tickets have been issued if there are any needed for that trip, and car/hotel has been reserved. Trips that have no air segments will go straight to "Ticketed/Reserved" when the approval occurs.

<u>Rejected</u>: Trip has been rejected by approver. Travelers need to cancel rejected trips themselves in order to cancel the hotel and car reservations. A trip that is in "Rejected" status has *Not Been Cancelled*.

Withdrawn: Trip has been cancelled by traveler or approver.

# 7. Additional Resources

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

Cl Azumano Webpage

Concur Login Page

Passive and Hard Stop Approval Information (Video)

Rejecting and Approving Travel as a Manager (Video)

Statewide Travel Program Training Resources Page

<u>Travel Vacation Reassignment (Video)</u>

What to Do If Your Travel Has Been Rejected or Approved (Video)