

APPROVING TRAVEL DOCUMENTS - WEB

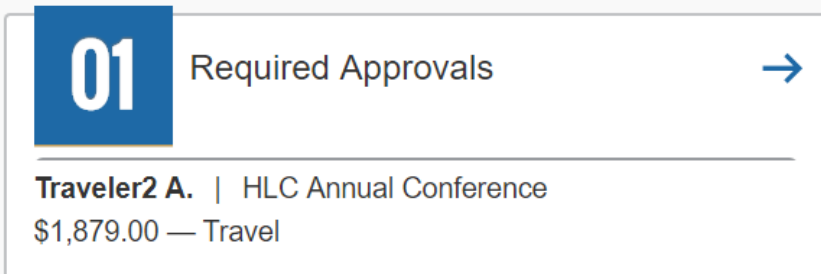
LOGGING INTO CONCUR

- Login to my.AState.edu
- Click on the Travel icon.
- Concur should automatically log you into the system.
- Alternatively, you can navigate to www.concursolutions.com and type in your e-mail address in the User Name field and your Concur password in the Password field.
 - If this is your first login, please contact Eric Jones (2005) or Traci Ellington (3261) for your initial password.
 - This password is not your A-State password and will not sync together.
 - We recommend that you change your Concur password at the same time you change your system password.
- If you cannot login, please contact our Security Administrators at cpi-security@astate.edu.

APPROVING TRAVEL REQUESTS

- In the lower left corner of your screen, you will see a box that says “Required Approvals”.

MY TASKS





01 Required Approvals →

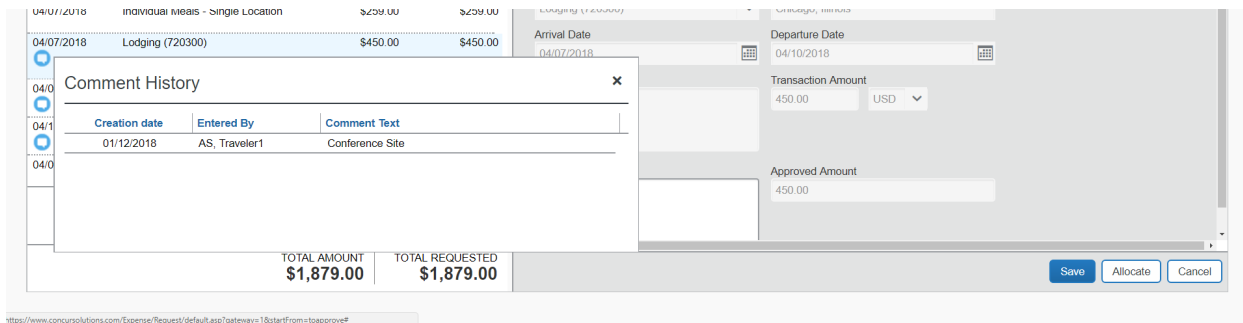
Traveler2 A. | HLC Annual Conference
\$1,879.00 — Travel

- Click on the term “Required Approvals”
- Concur will take you to the Approvals screen. Click on the Requests tab. The number on the tab is how many requests you need to approve.
- Click on the Request Name you would like to approve.

- If you have a previewer who has reviewed the request for you, a green checkmark icon will appear beside that request.

	Request Name	Employee Name
<input type="checkbox"/>  	Audit Rule Test	AS, Traveler2

- The first tab is the Request Header, which includes the trip name, dates of travel, trip purpose, destination, default funding source, and any cash advance information.
- The second tab is the Expense Summary tab, which gives you an estimated breakdown of all of the expenses.
- You may see several icons on this screen:
 - A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
 - A blue circle icon means that there is a comment. Hover over the icon to bring up the comment for you to read.



The screenshot shows a software interface for managing travel requests. A 'Comment History' pop-up window is open, displaying a table of comments:

Creation date	Entered By	Comment Text
01/12/2018	AS, Traveler1	Conference Site

The background interface shows a request summary for 'Individual meals - Single Location' with a total amount of \$1,879.00. It includes fields for 'Arrival Date' (04/07/2018), 'Departure Date' (04/10/2018), 'Transaction Amount' (450.00 USD), and 'Approved Amount' (450.00). Buttons for 'Save', 'Allocate', and 'Cancel' are visible at the bottom right.

<https://www.concursolutions.com/Expense/Request/default.asp?gateway=1&starFrom=toapprove#>

- A pie chart icon means that the expense has been allocated between two or more FOAP's. Hover over the icon to see how the expense is being charged.

Percentage	Fund	Org	Program	Activity	Code
50	(110000) Educat...	(311011) Control...	(1620) Fiscal O...		(J) Arkansas St...
50	(110000) Educat...	(311071) Spons...	(1620) Fiscal O...		(J) Arkansas St...

- Click on the “Attachments” icon to see if there are any memos or backup attached. Then, click on “View Documents in a new window”. If you have pop-up blocker set up in your browser, you will have to allow pop-ups from www.concursolutions.com.
- If you need to send the request back to the traveler to fix something, click on the “Send Back Request” button and enter the reason in the Comments field before clicking “OK”.
- If you are ready to approve, click on the “Approve” button. The document will go to the next approver in the flow.
- If you are ready to approve and need to add an additional approver, click on the “Approve & Forward” button.

Supervisor 1:

Approver, Default

User-Added Approver:

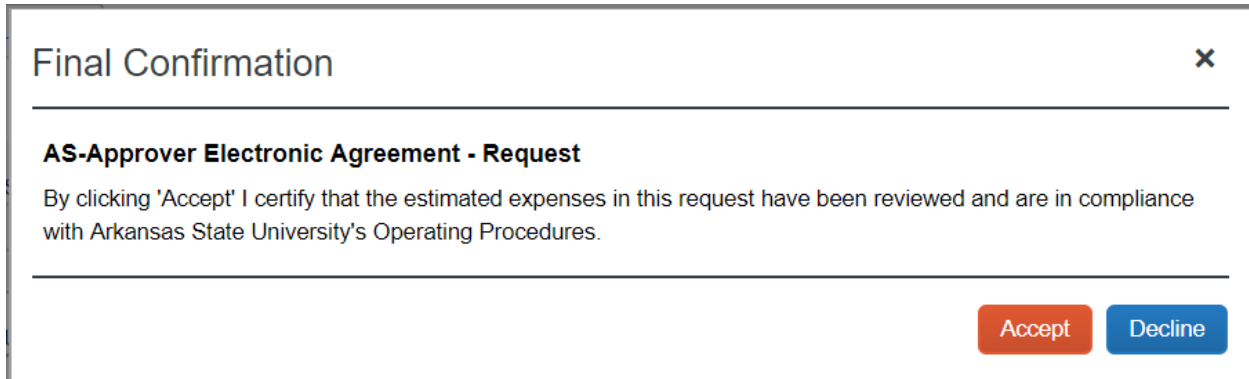
t

Test, Dean (dean@astate.edu)
User ID: dean
Logon ID: dean@astate.edu

Test, ExportControl (export@astate.edu)
User ID: export
Logon ID: export@astate.edu

Last Name


- Start typing the last name of the person you want to add, and allow Concur to bring up the names.
- Click on the person you want to add.
- After selecting the approver, click on the “Approve” button.
- You will receive a “Final Confirmation” message. Click on the “Accept” button.



- Concur will bring you back to the list of documents pending your approval.

APPROVING EXPENSE REPORTS

- In the lower left corner of your screen, you will see a box that says “Required Approvals”.
- Click on the term “Required Approvals”.
- Concur will take you to the Approvals screen. The number on the tab is how many expense reports you need to approve.
- Click on the Report Name you would like to approve.
- If you have a reviewer who has reviewed the report for you, a green checkmark icon will appear beside that expense report.

<input type="checkbox"/>	Request Name	Employee Name
<input type="checkbox"/>  	Audit Rule Test	AS, Traveler2

- Concur will automatically open the Expenses tab, which gives you a breakdown of all of the expenses.
- You could see several icons on this screen:

- A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
- A blue circle icon means that there is a comment. Hover over the icon to bring up the comment for you to read.
- A pie chart icon means that the expense has been allocated between two or more FOAP's. Hover over the icon to see how the expense is being charged.
- A blue icon with a piece of paper in the center means that there is a receipt image(s) attached. Hover over the icon to see the receipt image(s).
- If you need to see the header information or itinerary information, click on "Details", then "Report Header" or "Available Itinerary".
- If you need to send the report back to the traveler to fix something, click on the "Send Back to User" button and enter the reason in the Comments field before clicking "OK".
- If you are ready to approve, click on the "Approve" button. The document will go to the next approver in the flow.
- You will receive a "Final Confirmation" message. Click on the "Accept" button.
- If you are ready to approve and need to add an additional approver, click on the "Approve & Forward" button.

Supervisor 1:

Approver, Default

User-Added Approver:

t + ×

Test, Dean (dean@astate.edu)
 User ID: dean
 Logon ID: dean@astate.edu

Test, ExportControl (export@astate.edu)
 User ID: export
 Logon ID: export@astate.edu

Last Name v

+ + ×

- Start typing the last name of the person you want to add, and allow Concur to bring up the names.
- Click on the person you want to add.
- After selecting the approver, click on the “Approve” button.
- You will receive a “Final Confirmation” message. Click on the “Accept” button.

Final Confirmation ×

AS-Approver Electronic Agreement - Request

By clicking 'Accept' I certify that the estimated expenses in this request have been reviewed and are in compliance with Arkansas State University's Operating Procedures.

- Concur will bring you back to the list of documents pending your approval.

Updated January 2020