



APPROVING A TRAVEL REQUEST OR EXPENSE REPORT

Description: This job aid is to provide step-by-step instructions for approving a Concur Travel Request or Expense Report.

After an employee submits a Travel Request or Travel Expense Report from Concur, it goes to SAP Funds Management for a budget check to verify validity of the funding allocation and budget availability.

Once budget check is passed, the Travel Request or Expense Report work item will route to the appropriate approvers. Approvers will take action to approve or reject the work item in Employee Self-Service (ESS).

Here are step-by-step instructions for approving a Travel Request or Expense Report:

1. Log in to ESS (<u>https://ess.lausd.net</u>) with your SSO and click on the "Travel Approvals" tile.



2. All current Concur Travel Request or Expense Report work items pending your approval are displayed under "All Tasks" in the left pane. When you click on a work item, the associated trip information is displayed. You can click on "Review Attachments" or the Concur site link in order to go to Concur and view receipts, supporting documents, or other attachments, prior to approving the request or report. The steps below show an example for a Travel Expense Report work item.





All Tasks (4)	žΞ	Approve/Reject
Search	۹ C	
Approve/Reject Travel Expense:WP31DE for Ca Workflow System	 Medium	Approve/Reject Travel Expense WP31DE for C: \$4500000025 Workflow System Created on Jul 30, 2023, 2:11 PM Approval Preview
Approve/Reject Travel Request:34PH for Si Workflow System	a Medium	
Approve/Reject Travel Request:34PJ for Sa	្ឋ ាr Medium	Travel Details This is to inform you that the following Travel Expense has been submitted for your review and approval. Trip Number WP31DE Employee Name Ci
Approve/Reject Travel Request:34PJ for Si Workflow System	ar Medium	Employee Number 01 Cost Center 00011486011TS-Apps-E Trip Name Retro report - training Trip Purpose Staff training Trip Start Date 07/17/2023 Trip End Date 07/17/2023
		Travel Destination Local Trip Amount \$5250.00 Expense Type Expense Date Expense Amount Seminar/Course fees 07/30/2023 \$250.00 Co Type Cost Object Fund Functional Area CC 0001146601 010-0000 0000-0000-10025 If you have any questions or need assistance, please contact the Travel Desk at procurement.traveldesk@lausd.net or (562) 654-9393. To review attachments, receipts and supporting documentation, please click on this link https://www.concursolutions.com o log into Concur. Remember to copy the Trip Number under the Trip Details as this will be needed to look up the request or expense report in Concur.
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3. Copy the report number (Ctrl + C). Click on either of the links to go to Concur, which will open in a separate window. Click on Expense.

SAP Concur C Requests	Expense	Approvals	Reporting ▼	App Center					Help+ Profile +
					+ New	00 Required Approvals	04 Authorization Requests	100 Available Expenses	Open Reports

4. Click on "Process Reports."

SAP Concur 🖸	Requests	Exp	ense	Approvals	Reporting▼	App Center	
Manage Expenses	View Transactio	ons	Proces	ss Reports]		

5. For "every report where" select "Report Number," then "Equals" and paste (Ctrl + V) the report number you copied.





Group: All Groups I Can Access		
Run Query 🔹 Starting Grou	ip 🔻	
Find every report where		
Report Name	~	
Report Name	^	
Report Key		
Employee First Name	_	
Employee Last Name		
Employee ID		
- Report Id		1
Submit Date		
Processor Start Date		
Approval Status		
Payment Status		
Receipts Received		
Receipt Image Available		Begins With
Report Total		Begins With
Amount Approved		Contains
Report Type	_	Ends With
Report Number	<u> </u>	Equals WP31DE

6. Click on "Go."

Group: All Groups	I Can Access		
Run Query 🔹	Starting Group 🔹	List Settings	Create/Manage Queries •
Find every report	where		
Report Number	~	Equals	WP31DE AND
	~		Go

7. The expense report will be displayed in the Search Results. Click on the report.

5				
Search Results				
Group: All Groups I Can Access				
Run Query • Starting Group • I	List Settings Create/Manage Querie	es •		
Find every report where				
Report Number	Equals	WP31DE	AND	
~ (Go		
Report Name S	Submit Date Employee Name	Approval Status Report Total	Receipt Status Report Type	Cash Advance Payment Status
Retro report - tr 0	07/30/2023 Tenas, Carlos	Pending Externa \$250.00	Not Required Expense Type	Not Paid





8. You can view the receipt and other attachments by clicking on the Expense Type then clicking on the Receipt Image tab; OR

Manage Expenses View Trai	nsactions Process Reports	
Retro report - training (feres.Cartes) Summery Details · Recepts · Pric ·		
Expenses Vew * K Inte * Expense Type Reviewed Amount Requested 07/07/023 Seminant/Course fees H \$250.00 \$250.00	Summary Report Summary Report Totals	
	Amount Due Company	Amount Due Employee
TOTAL AMOUNT TOTAL REQUESTED \$250.00 \$250.00		

Retro r	eport - train	ing (Tenas, Carl	9]				
Summary I	letails • Receipts • Pri	nt •			De		
Expenses	Expense Type	Reviewed	Amount	View • 《	Expense Receipt Image		
07/30/2023	Seminar/Course fees School Police Training	N	\$250.00	\$250.00	±	v 1 of 2 - + Automatic Zoom v	● ⊡ I ∠ »
						SAP Concur 🖸 SAP	Â
						Activating E-Receipts	
						E-receipts are electronic receipt images sent to SAP Concur directly from the vendor. E-receipts help to eliminate paper receipts and make it easier for you to complete your expense reports. When e-receipt functionality has been activated for your company, you will see a note in the Alerts section of the SAP Concur home page.	
						1. To activate e-receipts, click Profile, and then click Profile Settings.	

Hover over the receipt icon 🕗 with your mouse and the document will display.

Retro report - tr	aining (Tenas, Carlos)	
Summary Details • Receipts •	Print *	
Exper	1 of 2	- + Automatic Zoom ×
Receipt Image Available	SAP Concur C	SAP
		Activating E-Receipts
	E-receipts are electronic E-receipts help to elimin your expense reports. W company, you will see a	receipt images sent to SAP Concur directly from the vendor. ate paper receipts and make it easier for you to complete nen e-receipt functionality has been activated for your note in the Alerts section of the SAP Concur home page.





9. After viewing the receipts, go back to the ESS window, then click on "Approve" or "Reject" to approve or reject the Expense Report.

Approve/Rej	ect Travel Expense: <mark>W</mark>	VP31DE for Ca	s 45000	00025			
Workflow System					Statu	is: Ready	
					Priority:	Medium	
Created on Jul 30	023 2.11 PM				Approval	Proview	
sieuce on sur so, z	.020, 2.111 1 101				Approver		
					Review Atta	chments	
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Travel Detail	s						
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Travel Detail	S that the following Travel Expen: WP31DE	se has been submitted fo	or your review and approv	al.			
Travel Detail This is to inform you Trip Number Employee Name	S that the following Travel Expension WP31DE C	se has been submitted fc	or your review and approv	al.			
Travel Detail This is to inform you Trip Number Employee Name Employee Number	S that the following Travel Expense WP31DE C 0	se has been submitted fo	or your review and approv	al.			
Triavel Detail This is to inform you Trip Number Employee Name Employee Number Cost Center	S that the following Travel Expension WP31DE C 0 0001148601ITS-Apps-E	se has been submitted fc	or your review and approv	al.			
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Travel Detail	S that the following Travel Expensive WP31DE C 0000 0001148601ITS-Apps-E Retro report - training 07/17/2023	se has been submitted fo	or your review and approv	al.			
Travel Detail This is to inform you Trip Number Employee Name Employee Number Cost Center Trip Name Trip Purpose Trip Start Date Trip End Date	S that the following Travel Expense WP31DE C O	se has been submitted fo	or your review and approv	al.			
Travel Detail This is to inform you Trip Number Employee Name Employee Number Cost Center Trip Name Trip Purpose Trip End Date Trip End Date Travel Destination	S that the following Travel Expense WP31DE C C OUD148601ITS-Apps-E Retro report - training Staff training 07/17/2023 Local	se has been submitted fo	or your review and approv	al.			

10. Enter an optional comment if needed, then click on Submit.

Submit	Decision
You selected "Approve	9".
Decision Note:	
Your retro expense re	eport is approved
	Submit Cancel

For additional information/reference, please also refer to the following job aids for Approvers<mark>:</mark>

- ✓ How to Add an Approver
- ✓ Approvers How to View Attachments