

APPROVING A TRAVEL REQUEST OR EXPENSE REPORT

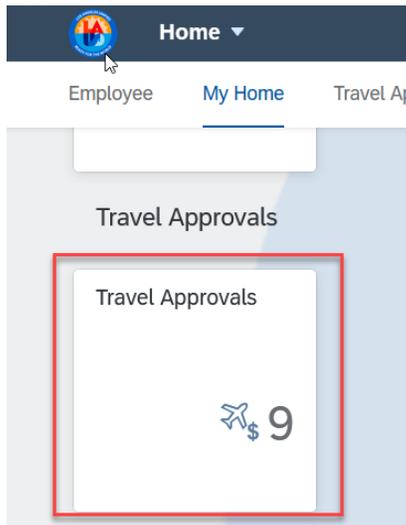
Description: This job aid is to provide step-by-step instructions for approving a Concur Travel Request or Expense Report.

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 (<https://ess.lausd.net>) 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) Approve/Reject

Search 🔍 ↻

- Approve/Reject Travel Expense:WP31DE for Ci... Medium
- Approve/Reject Travel Request:34PH for Si... Medium
- Approve/Reject Travel Request:34PJ for Sa... Medium
- Approve/Reject Travel Request:34PJ for S... Medium

Workflow System Medium

Created on Jul 30, 2023, 2:11 PM

Status: Ready
Priority: Medium

[Approval Preview](#)
[Review Attachments](#)

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...
Employee Number	01
Cost Center	0001148601ITS-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	\$250.00

Expense Type	Expense Date	Expense Amount
Seminar/Course fees	07/30/2023	\$250.00

CO Type	Cost Object	Fund	Functional Area
CC	0001148601	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> to 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.

[Approve](#) [Reject](#) [🔗](#)

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 Help

Requests **Expense** Approvals Reporting App Center Profile

LAUSD UNIFIED

New: 00 Required Approvals, 04 Authorization Requests, 100 Available Expenses, 02 Open Reports

4. Click on "Process Reports."

SAP Concur Help

Requests **Expense** Approvals Reporting App Center

Manage Expenses View Transactions **Process 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 Group

Find every report where

- Report Name
- Report Key
- Employee First Name
- Employee Last Name
- Employee ID
- Report Id
- Submit Date
- Processor Start Date
- Approval Status
- Payment Status
- Receipts Received
- Receipt Image Available
- Report Total
- Amount Approved
- Report Type
- Report Number**

Begins With

- Begins With
- Contains
- Ends With
- 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.

Search Results

Group: All Groups I Can Access

Run Query Starting Group List Settings Create/Manage Queries

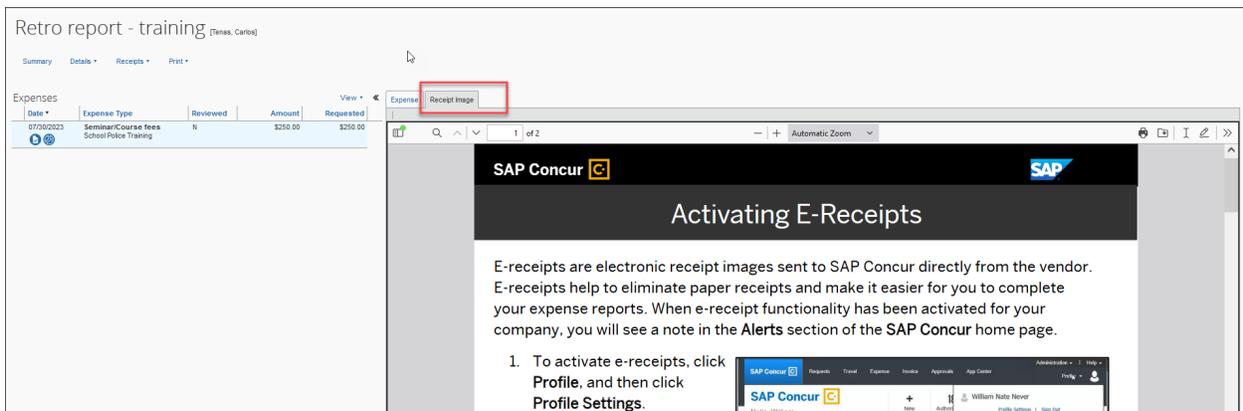
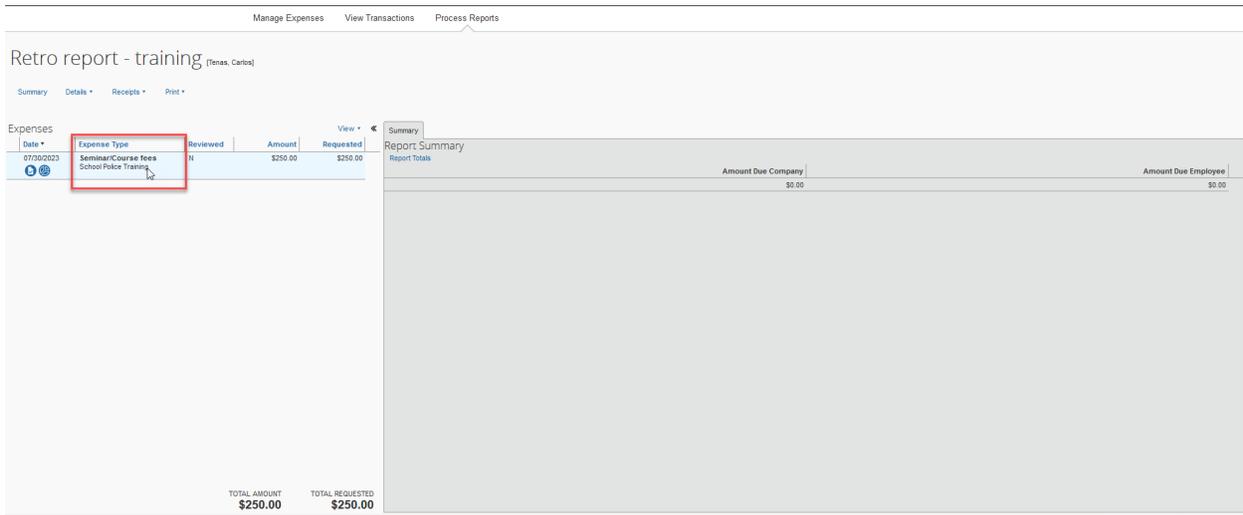
Find every report where

Report Number Equals WP31DE AND

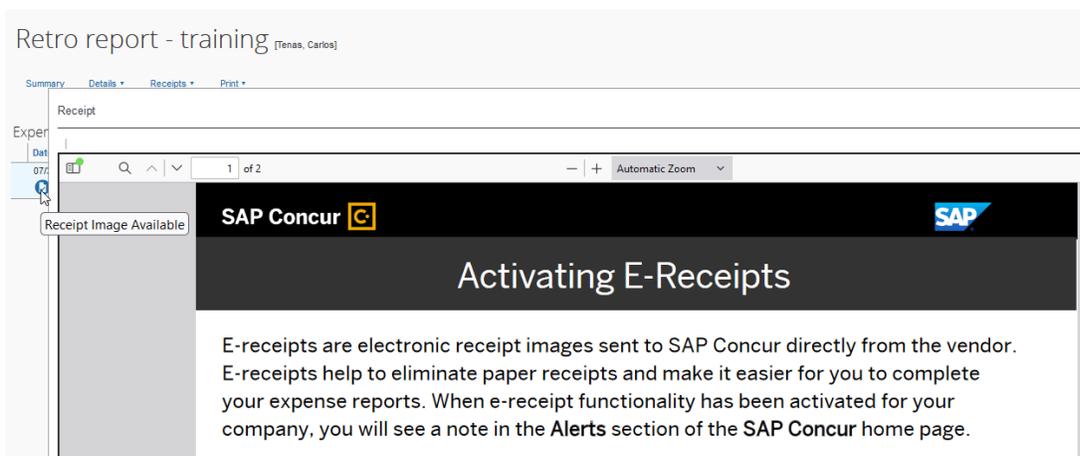
Go

Report Name	Submit Date	Employee Name	Approval Status	Report Total	Receipt Status	Report Type	Cash Advance...	Payment Status
Retro report - tr...	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



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



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/Reject Travel Expense: WP31DE for Cost Center 4500000025

Workflow System

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[Approval Preview](#)
[Review Attachments](#)

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	C
Employee Number	02222222
Cost Center	0001148601ITS-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

[Approve](#) [Reject](#) [Share](#)

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

Submit Decision

You selected "Approve".

Decision Note:

Your retro expense report is approved

[Submit](#) [Cancel](#)

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

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