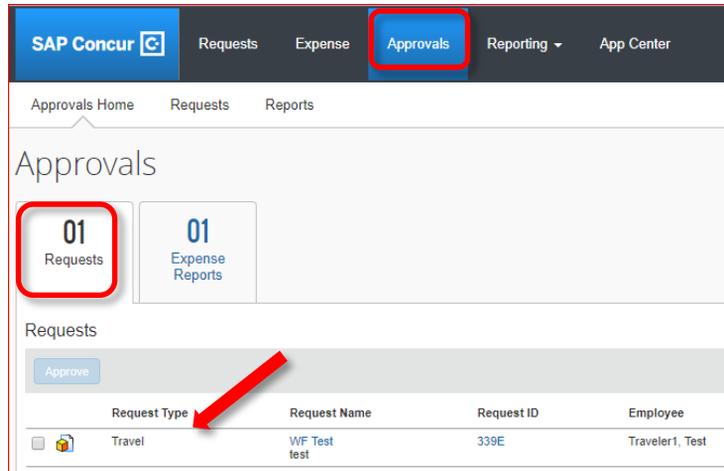


# Approving a Travel Request

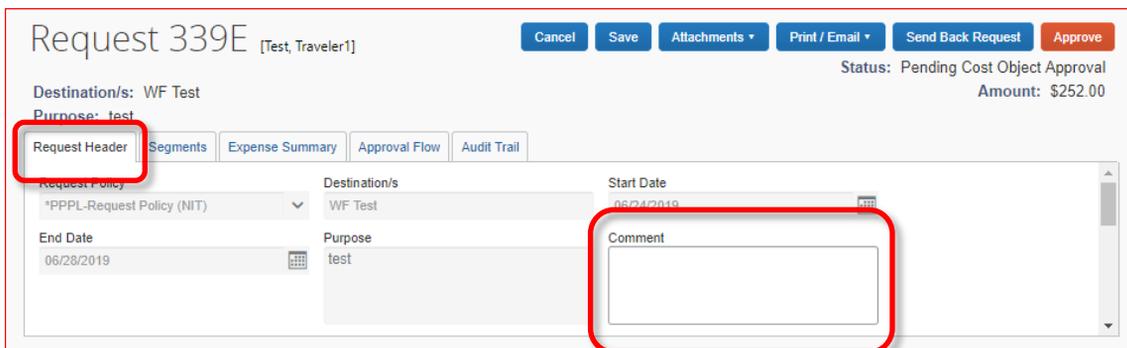


**Objective:** This section will go over how to approve a request as the cognizant Cost Center Approver or Department Head

1. **Select** *Approvals* at the top of the screen, then **click** on the *Requests* tab to view all the Travel Requests that are pending your approval. **Select** the Travel Request you wish to review.



2. You will be at the *Request Header* where the traveler entered the general information of the Travel Request. **Review** the information and **add** a Comment if desired.



3. **Click** on the *Segments* tab and the *Expense Summary* tab to review the travel expenses estimated by the traveler.

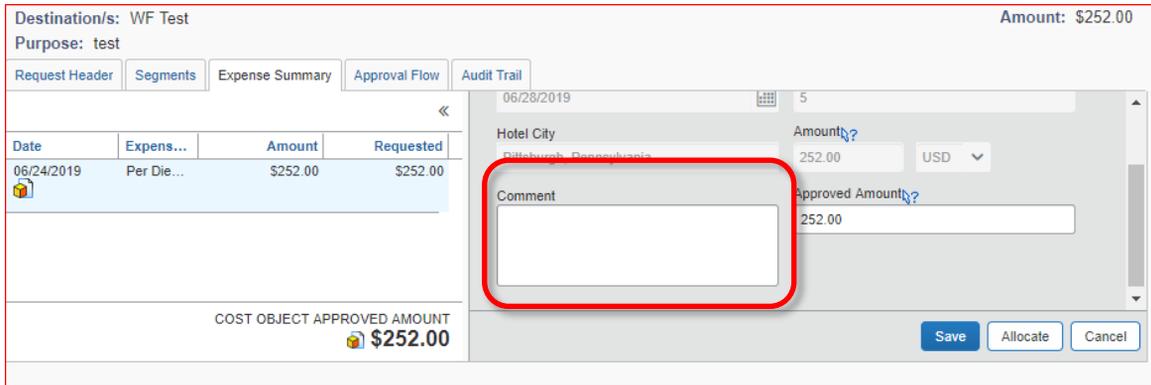
# Approving a Travel Request



4. Go through each expense type and review all the fields

 **Note:** Approvers have the ability to reduce (only) the estimated expense requested.

5. Enter a comment to any expenses in the *comment* field of each expense type if desired.



Destination/s: WF Test Amount: \$252.00  
Purpose: test

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expens...	Amount	Requested
06/24/2019	Per Die...	\$252.00	\$252.00

06/28/2019 5

Hotel City: Pittsburgh, Pennsylvania Amount: 252.00 USD

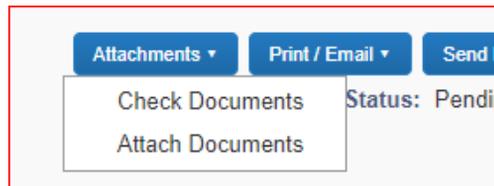
Comment: [Red box around comment field]

Approved Amount: 252.00

COST OBJECT APPROVED AMOUNT \$252.00

Save Allocate Cancel

6. Review any attachments relevant to the Travel Request (i.e. workshop agenda, FTMS form), **click** the *Attachments* button, then *Check Documents*. You can also attach any relevant documentation to the Travel Request by **clicking** *Attach Documents*.

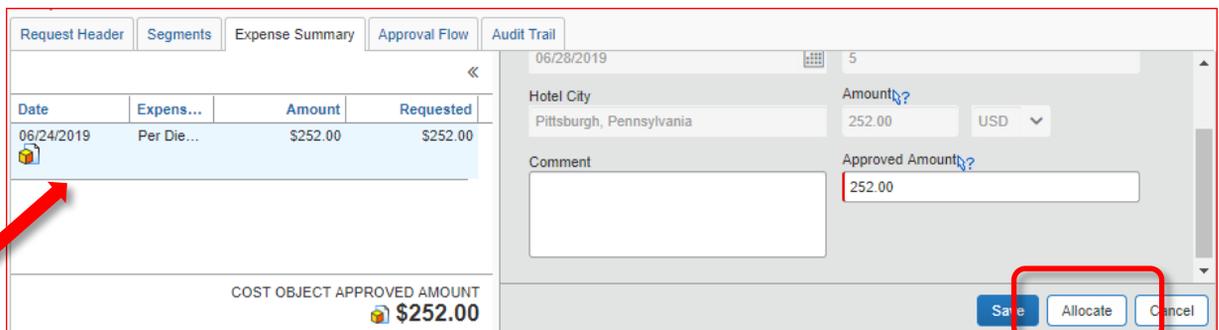


Attachments Print / Email Send E

Check Documents Status: Pending

Attach Documents

7. If you need to allocate any (or all) expenses to another cost center, **select** an expense and **click** the *Allocate* button.



Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expens...	Amount	Requested
06/24/2019	Per Die...	\$252.00	\$252.00

06/28/2019 5

Hotel City: Pittsburgh, Pennsylvania Amount: 252.00 USD

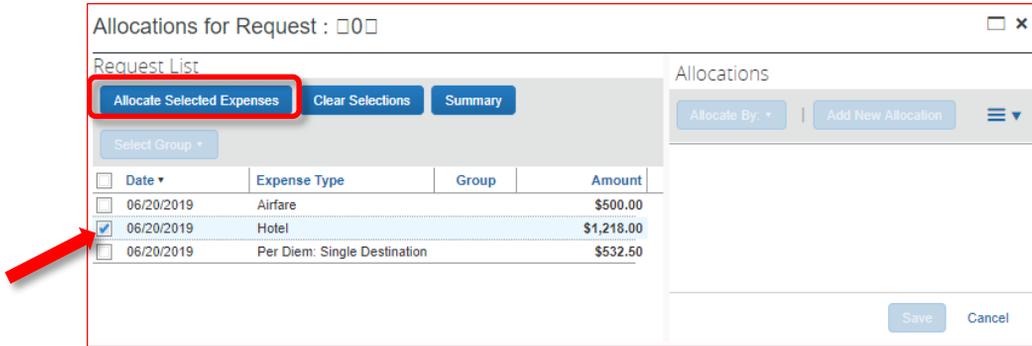
Comment: [Red box around comment field]

Approved Amount: 252.00

COST OBJECT APPROVED AMOUNT \$252.00

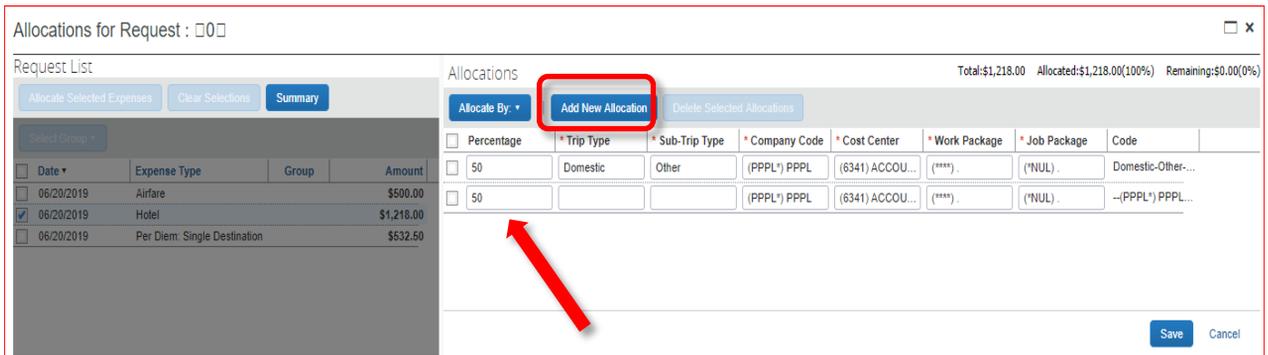
Save Allocate Cancel

8. A popup screen for Allocations for Request will appear. **Select** the expense types that need to be allocated. Then **click** the *Allocate Selected Expenses* button.



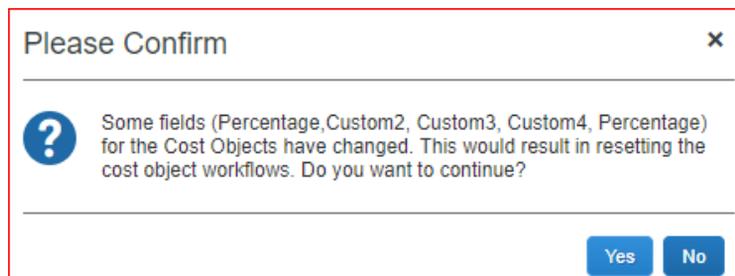
Date	Expense Type	Group	Amount
<input type="checkbox"/>	06/20/2019	Airfare	\$500.00
<input checked="" type="checkbox"/>	06/20/2019	Hotel	\$1,218.00
<input type="checkbox"/>	06/20/2019	Per Diem: Single Destination	\$532.50

9. The cost center that was entered on the Request Header will appear with 100% allocation. **Click** on *Add New Allocation* to add a new cost center, and adjust the appropriate percentage of the allocations.



Percentage	Trip Type	Sub-Trip Type	Company Code	Cost Center	Work Package	Job Package	Code	
<input type="checkbox"/>	50	Domestic	Other	(PPPL*) PPPL	(6341) ACCOU...	(****)	(*NUL)	Domestic-Other...
<input type="checkbox"/>	50			(PPPL*) PPPL	(6341) ACCOU...	(****)	(*NUL)	-(PPPL*) PPPL...

10. Once you have made all appropriate allocations, **click** *Save*. A popup will appear to notify you that since the allocations have been changed, the approval workflow will reset. **Click** *Yes* to confirm the change.



Please Confirm

Some fields (Percentage, Custom2, Custom3, Custom4, Percentage) for the Cost Objects have changed. This would result in resetting the cost object workflows. Do you want to continue?

Yes No

# Approving a Travel Request

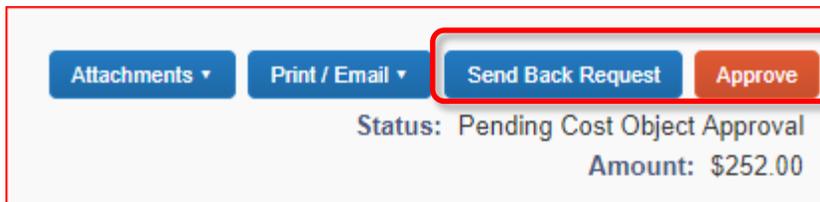


11. You will now see an indicator on the expense(s) that are being supported by multiple cost centers.

Date	Expens...	Amount	Requested
06/24/2019	Per Die...	\$252.00	\$252.00

12. Upon review of the Travel Request:

- If the request is satisfactory, **select** *Approve* from the options at the top right corner of the screen, then proceed to step 13.
- If the request needs to be modified, **select** *Send Back Request* and make sure to provide a comment to the traveler of what needs to be corrected.



**Note:** To add an additional approver to review the Travel Request, **click** the *Approval Flow* tab, then + button, and type in the Approver's name. The Individual must have an approver role in Concur in order to be added.

▲ Star Nul (PPPL\*-6321-\*\*\*\*-\* Nul): Pursell, Jaclyn M.

Pursell, Jaclyn M.

User-Added Approver:

**drapkin**

Drapkin, Svetlana (sdrapkin@pppl.gov)

13. **Read** the popup containing PPPL User Confirmation and then **click** *Accept* to certify.

Final Confirmation ✕

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**PPPL Approver Electronic Agreement**

Cost Center Approver  
By clicking the 'Accept' button, I certify that the estimated expenses in this Request have been reviewed and are in compliance with PPPL's policy, and will be incurred in support of PPPL mission.

Travel Compliance Officer  
By clicking 'Accept', I certify that the estimated expenses in this Request have been reviewed and are in compliance with PPPL's policy.

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