

Business Class Approval due to Length of travel:

Step 1: Create request and add internal comment

- a. Example: I am requesting to travel via business class due to the duration of this trip which falls under travel guidelines.

The screenshot shows the 'Edit Request Header' form in SAP Concur. The form is titled 'Hong Kong Conference' with Request ID '3E6Y'. It contains several fields for trip details: Trip Name, Trip Start Date (02/06/2023), Trip End Date (02/10/2023), Trip Purpose (Conference), Destination City (Hong Kong, HONG KONG), Destination Country (HONG KONG (HK)), Traveler Type (1 - State Employee), and Domestic/International (Domestic). There is a 'Justification/Detailed Description of Trip Purpose' field which is currently empty. Below this are fields for Funding Source, Account, and Account Approver. The Internal Comment field contains the text: 'I am requesting to travel via business class due to the duration of this trip which falls under travel guidelines.' The form has a 'Save' button at the bottom right.

Step 2: Provide special request (ex.business class) approval from Area VP or Dean

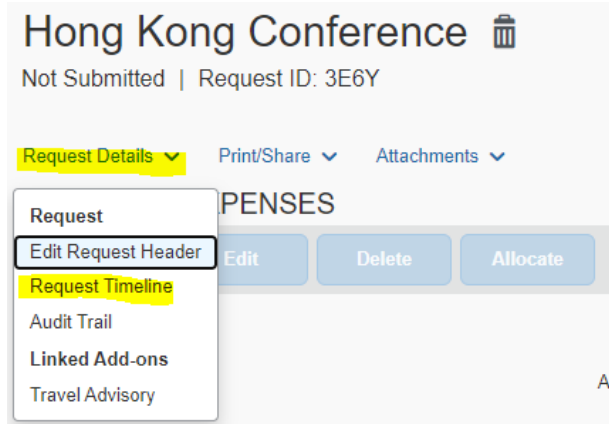
- a. Receive approval via email and attach to the request:
 - i. Select Attachments, Attach Document and Upload file (as you would a receipt)

The screenshot shows the 'Hong Kong Conference' request details page. The page title is 'Hong Kong Conference' with a trash icon and 'Not Submitted | Request ID: 3E6Y'. There are navigation links for 'Request Details', 'Print/Share', and 'Attachments'. Below this is a section titled 'EXPECTED EXPENSES' with buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A dropdown menu is open over the 'Attachments' link, showing an 'Attach Documents' option. Below the main content is a 'Document Upload and Attach' modal window with a large red box containing a plus sign and the text 'Upload and Attach 5MB limit per file'. A 'Close' button is at the bottom right.

or

b. Add Area VP or Dean to the request approval workflow:

i. Select Request Details, and Request Timeline



ii. Edit Approval Flow

Request Timeline
Hong Kong Conference | \$0.00

Approval Flow [Edit](#)

- Risk Management Approval**
International Travel (NYS Policy, Div. of Enterprise Risk Managemen
- Supervisor Approval**
Paduano, Gerardina C.
- Account Approval**

Request Summary

Request Comment
Jashfar, Kacey 01/06/2023
I am requesting to travel via business class due to the duration of this trip which falls under travel guidelines.

[Add Comment](#)

iv. Add step and type in and select the appropriate Dean or Area VP

Edit Approval Flow x

[+ Add Step](#)

Risk Management Approval

International Travel (NYS Policy, Div. of Enterprise Ris...

[+ Add Step](#)

Supervisor Approval

Paduano, Gerardina

[+ Add Step](#)

User-Added Approver

▼ Search by Last Name Delete

[+ Add Step](#)

Account Approval

[+ Add Step](#)

Cancel Save

Step 3: Add estimated expected expenses to the request and submit the request.

Hong Kong Conference \$3,806.00 🗑️ Copy Request Submit Request

Not Submitted |

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type ⌵	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Airfare	New York (JFK) - Hong Kong (HKG) : Round Trip	02/06/2023	\$1,548.00	\$1,548.00
<input type="checkbox"/>	Car Service		02/10/2023	\$120.00	\$120.00
<input type="checkbox"/>	Car Service		02/06/2023	\$120.00	\$120.00
<input type="checkbox"/>	Lodging	Hong Kong, HONG KONG	02/06/2023	\$800.00	\$800.00
<input type="checkbox"/>	Meals Per Diem (Individual)	Hong Kong, HONG KONG	02/06/2023	\$720.00	\$720.00
<input type="checkbox"/>	Registration/Conference Fee (International)		02/06/2023	\$500.00	\$500.00
					\$3,806.00

Step 4: Once the request is approved you may book travel arrangements for your trip via the agent assisted line at (800) 774-0655 or highered@dt.com. Provide Direct Travel with your approved Request ID and they will contact SBU Travel to confirm the approval steps were taken.

Special Request Approval due to medical necessity:

Step 1: Create request and add internal comment

- a. Example: I am requesting to travel via business class due to medical necessity on file with the Office of Equity and Access.

The screenshot shows the 'Edit Request Header' form in SAP Concur. The form is titled 'San Francisco Conference | Request ID: 3E73'. It contains several sections:

- Funding Source - Policy:** *STATE-NIT
- Trip Information:** Trip Name (San Francisco Conference), Trip Start Date (03/06/2023), Trip End Date (03/10/2023), Trip Purpose (Conference), Destination City (San Francisco, California), Destination Country (UNITED STATES (US)), Traveler Type (1 - State Employee (includes students on State payroll)), Domestic/International (Domestic), and Does this trip contain personal travel? (No).
- Justification:** SAP Concur Conference.
- Funding Source:** Search by Text, Account, and Account Approver fields.
- Fiscal year:** Jul 1st 2022 - Jun 30th 2023
- Internal Comment:** I am requesting to travel via business class due to medical necessity on file with the Office of Equity and Access

Buttons for 'Cancel' and 'Save' are visible at the bottom right.

Step 2: Provide special request (ex.business class) approval from Area VP or Dean

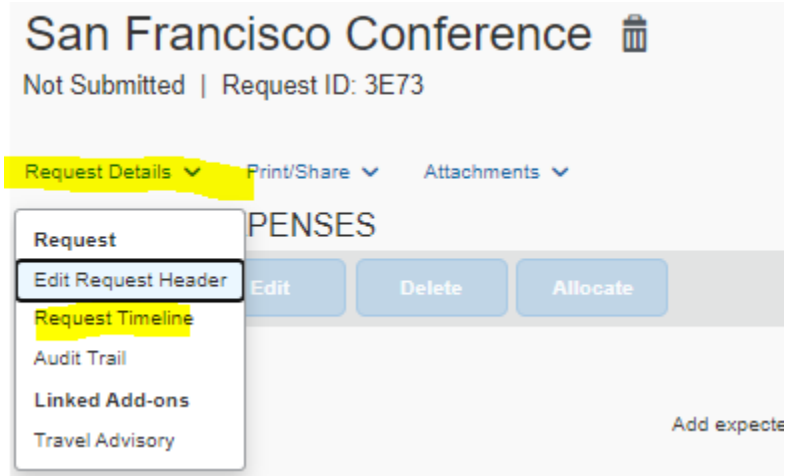
- c. Receive approval via email and attach to the request:
 - i. Select Attachments, Attach Document and Upload file (as you would a receipt)

The screenshot shows the 'San Francisco Conference' request details page. The status is 'Not Submitted | Request ID: 3E73'. There are navigation tabs for 'Request Details', 'Print/Share', and 'Attachments'. Below the tabs, there is a section titled 'EXPECTED EXPENSES' with an 'Attach Documents' button. At the bottom, there are four buttons: 'Add', 'Edit', 'Delete', and 'Allocate'.

The screenshot shows a 'Document Upload and Attach' dialog box. It features a large red-bordered box with a red plus sign in the center. Below the plus sign, the text reads 'Upload and Attach' and '5MB limit per file'. A 'Close' button is located at the bottom right of the dialog.

or

- d. Add Area VP or Dean to the request approval workflow:
 - i. Select Request Details, and Request Timeline

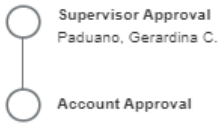


- ii. Edit Approval Flow

Request Timeline

San Francisco Conference | \$0.00

Approval Flow [Edit](#)



Request Summary

Request Comment

Jashfar, Kacey 01/06/2023

I am requesting to travel via business class due to medical necessity on file with the Office of Equity and Access.

iii. Add step and type in and select the appropriate Dean or Area VP

Edit Approval Flow ✕

[+ Add Step](#)

Supervisor Approval

Paduano, Gerardina

[+ Add Step](#)

User-Added Approver

▼ Search by Last Name [Delete](#)


[+ Add Step](#)

Account Approval

[+ Add Step](#)

[Cancel](#) [Save](#)

Step 3: Add estimated expected expenses to the request and submit the request.

San Francisco Conference \$2,186.00  [Copy Request](#) [Submit Request](#)

Not Submitted | **Request ID: 3EAH**

[Request Details](#) [Print/Share](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type ☰	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Registration/Conference Fee (Out-of-State)		02/13/2023	\$150.00	\$150.00
<input type="checkbox"/>	Meals-Per Diem (Individual)	San Francisco, California	02/13/2023	\$316.00	\$316.00
<input type="checkbox"/>	Lodging	San Francisco, California	02/13/2023	\$1,200.00	\$1,200.00
<input type="checkbox"/>	Car Service		02/17/2023	\$120.00	\$120.00
<input type="checkbox"/>	Car Service		02/13/2023	\$120.00	\$120.00
<input type="checkbox"/>	Airfare	New York (JFK) - San Francisco (SFO) : Round Trip	02/13/2023	\$280.00	\$280.00
					\$2,186.00

Step 4: Once the request is approved you may book travel arrangements for your trip via the agent assisted line at (800) 774-0655 or highered@dt.com. Provide Direct Travel with your approved Request ID and they will contact SBU Travel to confirm the approval steps were taken.