CONCUR QUICK GUIDE: APPROVING REQUEST & EXPENSE

GETTING STARTED
1. Log in by going to the campus Accounts Payable website (https://www.csuchico.edu/ap/) and selecting the Concur Travel & Expense (CTE) button.

ACCESSING SUBMISSIONS PENDING APPROVAL
From the Concur Homepage, click one of the following:
- Approvals link on the Quick Task Bar
- Required Approvals link to the left of The California State University welcome message
- Required Approvals link found under My Tasks

APPROVAL OPTIONS
1. Approve a submitted Request or Expense Report
   a. Click the name of the report you want to open
   b. Review request for trip details, assess reasonableness of travel dates, expenses, and business purpose.
   c. Review expense report by looking at overall cost of trip, scanning for reasonableness and noting any alerts at the top of the screen. Ensure required receipts and itemizations have been provided.
      i. Click the icons associated with expenses to display attached receipt images, account allocations, comments, missing receipt affidavits, and exceptions
      ii. Click the > symbol to expand the expense entry to display itemization details
      iii. Click Details > Allocations to view chartfield allocations for the entire report
   d. After reviewing all items, click Approve

2. Send a Submission Back to the Employee
   Approvers cannot modify requests or expense reports, other than altering the chartfield. If the report requires correction, send it back to the Employee.
   a. Click the name of the report you want to open
   b. Click Send Back to Employee
   c. Use the Comment field in the Send Back Report window to explain the reason the report is being returned to the employee, then click OK

COST OBJECT APPROVER (“Minimum Travel Signature Authority”)
- When entering a request, the Concur system allows you to allocate expenses to one or multiple chartfield designations (split by amount or %).
- If expenses are shared between a home department and an outside department, upon submission, the request will simultaneously forward to the appropriate approving authority for that chartfield designation.
- Each approver can take individual action on the request, but the request will not move to approved status until approved by all necessary approvers.

VIEW APPROVED REPORTS
- You may go back to review any reports you have already approved
- From the Request or Expense tab, click Approve Reports
- On the left side of the screen change your View to filter for the reports you want to review
CONCUR QUICK GUIDE: APPROVING REQUEST & EXPENSE

QUESTIONS?
CONTACT AP:
Phone: (530) 898-6426
Email: accounts payable@csuchico.edu

ICON LEGEND

**Trip Data:** Indicates trip information from an itinerary

**Ground:** Indicates that the expense entry originated from a ground transportation itinerary.

**Credit Card Transaction:** Indicates an expense entry from a credit card transaction.

**Electronic Receipt:** Indicates that an e-receipt is available in Available Expenses.

**Exception:** Indicates that an expense entry exception must be resolved before submission.

**Sent Back:** Indicates that the approver sent a report back to the submitter with comments.

**Full Allocation:** Indicates that the expense entry has been fully allocated.

**Partial Allocation:** Indicates that the expense entry has been partially allocated.

**OCR Receipt:** Indicates that an expense entry has an Optical Character Recognition (OCR) receipt (for example, ExpenseIt).

**Paper Receipt Required:** Indicates that an expense requires a paper receipt.

**Receipt Image Required:** Indicates that an imaged receipt is required for this expense.

**Receipt Attached:** Indicates that an expense entry has a receipt image attached to it.

**Receipt Affidavit:** Indicates a missing receipt affidavit has been attached to the expense.

**XML Receipt Attached:** Indicates that an XML receipt is attached to the expense.

**Personal Expense:** Indicates that an expense entry was marked as personal.

**Report Ready for Submission:** Indicates that the expense report has been reviewed and is ready for delegator review and submission.

**Success:** Indicates that all required approvals have been processed.