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**Concur**  
**Reference Guide**  
**Approval**

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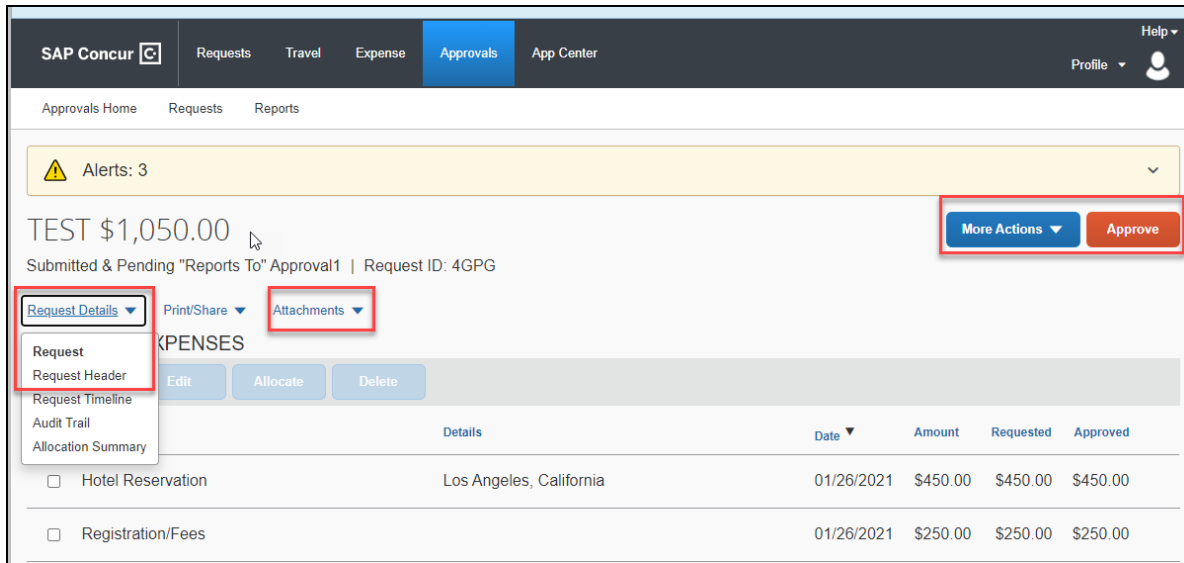
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# Approval

## Reviewing and Approving a Travel Request

The approver will see requests awaiting approval under the Approvals tab or the Required Approvers tile under “My Tasks” on their Concur home page. Trip elements should not be booked until approval occurs.

1. Select the Request you wish to approve by clicking the **Request Name**.



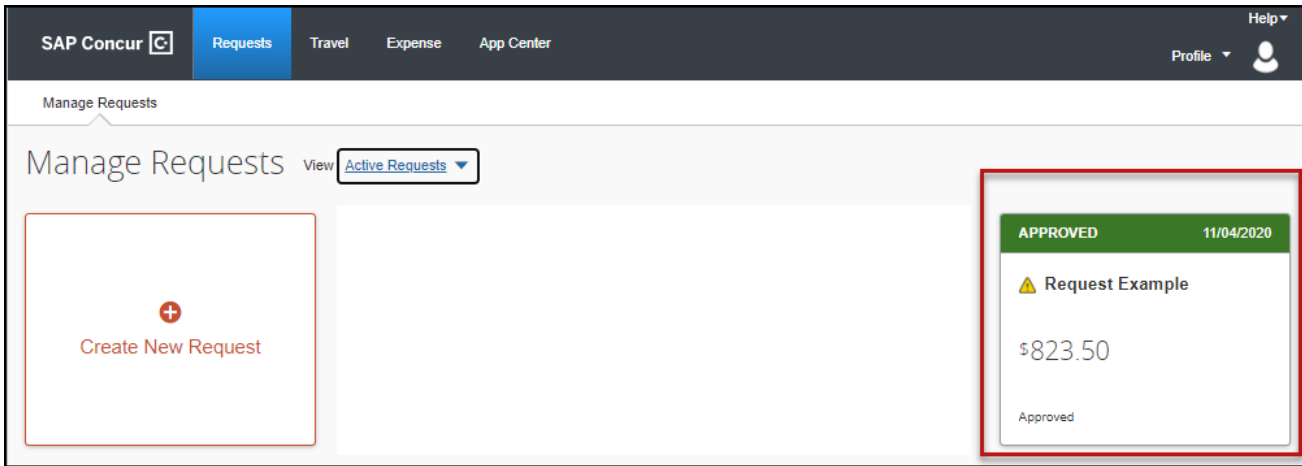
2. Review the **Request Details** and select Request Header and the review **Expected Expense** information. Things to consider:

- a. Review destination and see if banned state or alerts for high hazard destinations are noted.
- b. Take note of any personal days and consider that estimated costs are prorated accordingly (i.e. daily meal allowances, incidentals, etc.).
- c. Review request comments and any attachments to obtain further information about purpose of trip.
- d. Review all expenses for reasonableness and completeness.

3. There are three approval options

- a. **Approve** – approve the Request
- b. **More Actions**
  - i. **Edit Approval Flow** – This option allows you to add another approver for additional review. Click “+ Add Step” and add an additional approver in the “Budget Approval” step. Enter the the last name of the approver and select from the dropdown box. You can only select users who are already designated as approvers in the system.
  - ii. **Send Back to Employee** – Return the Request to the traveler. Use the Comment field in the Send Back to Employee window to explain the reason the report is being returned, then click OK.

Once Travel Request has been acted on by the approver, notification regarding the status will be sent to the traveler (and delegate if opted into notifications) and the status will be noted on the traveler's **Manage Requests** page.



## Reviewing and Approving an Expense Report

### Reviewing an Expense Report

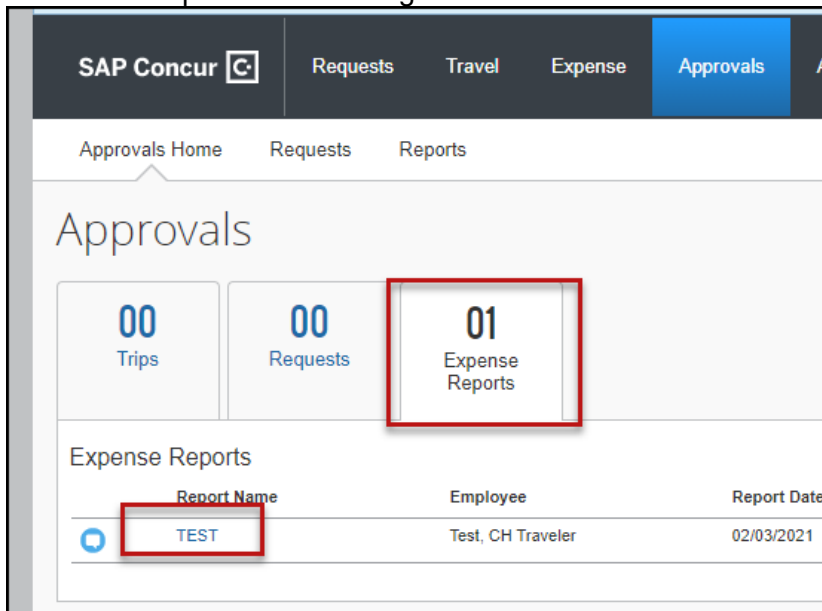
1. On the home page, in the **Required Approvals** section of **My Tasks**, click on **Required Approvals** title of the **blue arrow** to the right.

**OR**

On the home page, in the Quick Task Bar, click the **Required Approvals** tile.

The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.

2. Review the report details. Things to consider:



- a. Review dates and locations of expenses compared to the original request.

The screenshot shows a travel request form for a user named 'TEST [Test, CH Traveler]'. The form is divided into two main sections: 'Expenses' on the left and 'Personal Information' on the right.

**Expenses Table:**

Transaction Date	Expense Type
01/28/2021	Hotel/Lodging
01/28/2021	Airfare
01/28/2021	Breakfast - Domestic
01/27/2021	Breakfast - Domestic
01/27/2021	Dinner - Domestic
01/27/2021	Lunch - Domestic
01/26/2021	Dinner - Domestic
01/11/2021	Registration/Fees

**Personal Information Form:**

- Previous Comment: Entered By CH Traveler Test: Test
- Report Id: 753A44D5492741F9AB32
- Report Key: 25618
- Report/Trip Name: TEST
- Traveler Type: 2-Staff
- Travel Start Date: 01/26/2021
- Travel End Date: 01/28/2021
- Personal Dates of Travel-If none enter NA: NA
- Are you travelling to a banned state?: No
- Are you traveling: No
- Business Unit: [Dropdown]
- Fund: [Dropdown]
- Class: [Dropdown]
- Project: [Dropdown]
- User Name: [Dropdown]
- Report Currency: [Dropdown]
- Receipts Received: [Dropdown]

- b. Take note of any personal days on the request and whether expenses were claimed on those dates.
- c. Compare the total amount being claimed for reimbursement with what was requested.

The screenshot shows a travel request summary page for a user named 'TEST [Test, CH Traveler]'. The page is divided into two main sections: 'Expenses' on the left and 'Report Summary' on the right.

**Expenses Table:**

Transaction Date	Expense Type	Enter Vendor N...	Additional Info...	City of Purchase	Payment Type	Amount	Adjusted Claim...
01/28/2021	Hotel/Lodging	AlbMar Hotels		Los Angeles, Ca...	Out of Pocket	\$445.00	\$445.00
01/28/2021	Airfare	United Airlines		Los Angeles, Ca...	University Paid	\$180.00	\$180.00
01/28/2021	Breakfast - Domestic			Los Angeles, Ca...	Out of Pocket	\$18.45	\$18.45
01/27/2021	Breakfast - Domestic			Los Angeles, Ca...	Out of Pocket	\$9.00	\$9.00
01/27/2021	Dinner - Domestic			Los Angeles, Ca...	Out of Pocket	\$27.00	\$27.00
01/27/2021	Lunch - Domestic			Los Angeles, Ca...	Out of Pocket	\$19.00	\$19.00
01/26/2021	Dinner - Domestic			Los Angeles, Ca...	Out of Pocket	\$32.87	\$32.87
01/11/2021	Registration/Fees	AlbMar Conference		Los Angeles, Ca...	Out of Pocket	\$250.00	\$250.00

**Report Summary Table:**

Request Name	Request ID	Amount Approv...	Amount Demand...
TEST	4090	\$1,050.00	\$133.68

**TOTAL AMOUNT: \$981.32**  
**TOTAL APPROVED: \$981.32**

- d. Review all expenses for reasonableness and completeness.

## Approving an Expense Report

If you are satisfied with the Expense Report, click **Approve** in the top right corner of the screen.

## Sending Back an Expense Report

During your review, you may choose to return the entire expense report to the employee for correction. To return a report:

1. Click **Send Back to User**. The **Send Back Report** window appears.
2. Enter a **Comment** for the employee explaining why you are returning the report.
3. Click **OK**.

The screenshot shows the 'International exp test' interface. At the top right, there are three buttons: 'Send Back to User' (highlighted with a red box), 'Approve', and 'Approve & Forward'. Below the buttons is a 'Summary' tab and a 'Details' dropdown menu. The main area displays an 'Exceptions' table with one entry: 'Hospitality' on 06/03/2016 for \$100.00. Below this is an 'Expenses' table with columns for Transaction Date, Expense Type, Enter Vendor N., Additional Info., City of Purchase, Payment Type, Amount, and Adjusted Claim. The table lists various expenses such as Hotel, Laundry, Other Accommodation, Team/Group Travel, Personal Car Mileage, Airfare, Airline Fees, and Car Rental. On the right side, there is a 'Report Summary' section showing 'Report Totals' with 'Amount Due Company' at \$0.00 and 'Amount Due Employee' at \$1,906.29. Below that is a 'Requests (1)' section with a table showing a request for 'international...' for \$2,530.00.

The 'Send Back Report' window has a title bar with a close button. Below the title bar is a 'Comment History' section with a table with columns: 'Date', 'Entered By', and 'Comment Text'. The table is currently empty. Below the table is a text input field with the placeholder text: 'Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.' Below the input field is a 'Comment' label and a text input field.

## Adding an Additional Reviewer/Approver Step

You will have the ability to send the report to another approver. To approve and forward a report:

1. Click the **Approve & Forward** button in the top right of the screen.
2. Enter the **User-Added Approver**, and add a comment, as needed.
3. Click **Approve & Forward** to approve the Expense Report and send to the next approver. It is suggested to add a comment so that the recipient understands why they were added to the approval flow.

Approve & Forward Report: TEST

User-Added Approver:

Comment:

Approve & Forward Cancel

## Delegating Approver Duties

In the case of an absence an approver can delegate the approval step to another person for a temporary window of time.

### To add a delegate:

1. Click **Profile > Profile Settings**, on the left hand side of the page under the Request Settings header click **Request Delegates**.

SAP Concur

Requests Travel Expense Approvals Reporting App Center Admin

Profile Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation Reassignment

Your Information

Personal Information  
Company Information  
Contact Information  
Email Addresses  
Emergency Contact  
Credit Cards

Travel Settings

Travel Preferences  
International Travel  
Frequent-Traveler Programs  
Assistants/Arrangers

Request Settings

Request Information  
**Request Delegates**  
Request Preferences  
Request Approvers  
Favorite Attendees

Expense Settings

Expense Information  
Expense Delegates  
Expense Preferences  
Expense Approvers

## Profile Options

Select one of the following to customize your user profile.

**Personal Information**  
Your home address and emergency contact information.

**Company Information**  
Your company name and business address or your remote location address.

**Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**  
Going to be out of the office? Configure your backup travel manager.

**Request Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Personal Car**  
Personal Car

**Concur Mobile Registration**  
Set up access to Concur on your mobile device.

**System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**  
How can we contact you about your travel arrangements?

**Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.

**Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Change Password**  
Change your password.

2. On the **Request Delegates** page, click **Add**. The search area appears.
3. Type at least the first three letters of the employee's last name to search for the person you wish to add as a Delegate, and click **Add**.

4. Check the boxes that correspond with the permissions you are granting to the delegate. In the example below, if you wanted to delegate the approval function only you would check “can approve temporary” add the dates of temporary approval authority and check the “receives approval emails” so that they are also notified as submissions occur.

Option	Description
*Can Prepare	If selected, the delegate can create expense reports and requests on your behalf.
*Can View Receipts	If selected, the delegate can view receipt images on your behalf.
*Receives Emails	If selected, the delegate receives a copy of each Expense related email that you receive, except for approval emails.
Can Preview for Approver	If selected, the delegate can preview requests and expense reports on behalf of another employee. This delegate cannot approve the request/expense report.
Receives Approval Emails	If selected, the delegate receives a copy of each Expense approval-related email that you receive.
(*) Can Approve	If selected, the delegate can approve expense reports, and requests on your behalf, without date constraints.
(*) Can Approve Temporary	If selected, the delegate can approve expense reports and requests on your behalf but only for the specified period. If you select this option, you must also select beginning and ending date.

*(\*) The option to delegate approver rights will only be available for Approvers in the system. The approver's rights can also only be delegated to another user who also has approval rights in the system. This function can be used for times when an approver is unavailable and approval tasks will be covered by another person in their absence (i.e. Dean unavailable and approvals would be routed to Provost).*

5. Click **Save**.
6. To **delete a delegate** click the checkbox to select the person, click **Delete**, and confirm deletion.