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Concur Reference Guide
Approval

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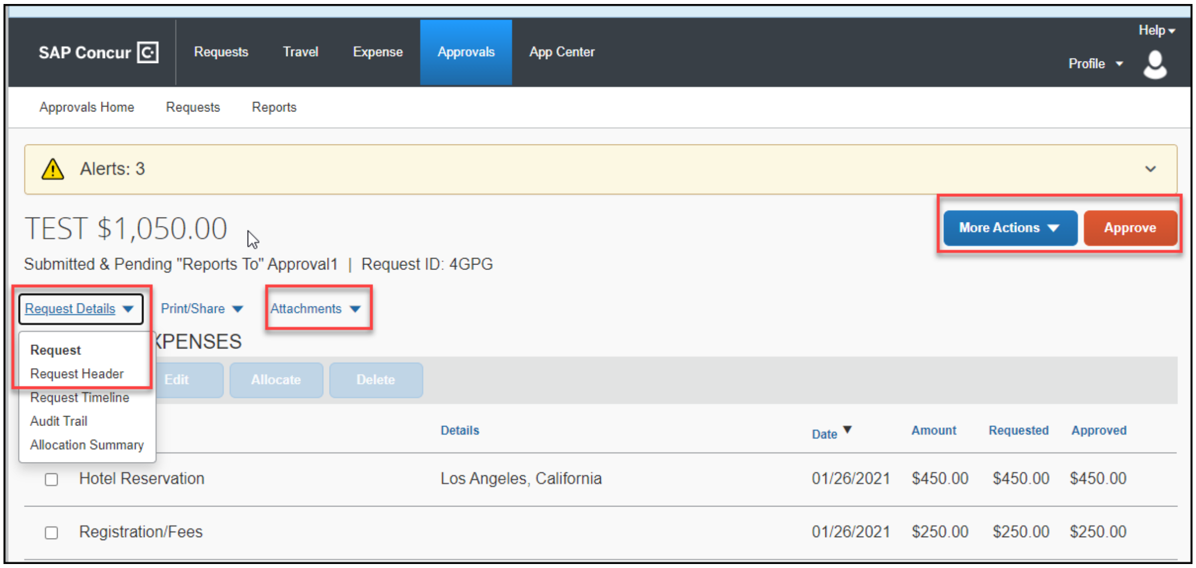
The approver will see requests awaiting approval under the Approvals tab or the Required Approvers tile under “My Tasks” on their Concur home page. Trip elements should not be booked until approval occurs.

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

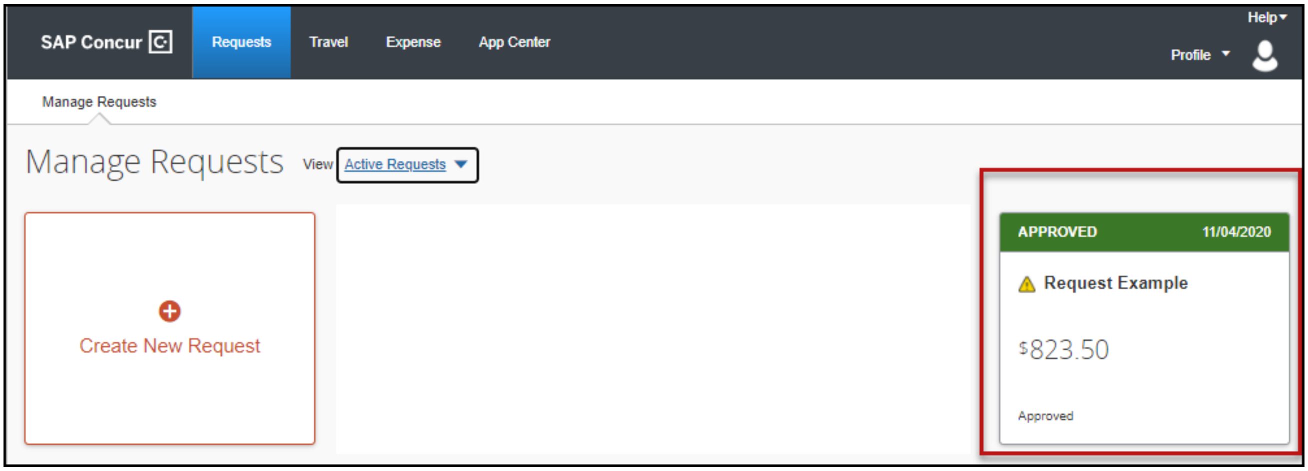
    a. **Approve** – approve the Request

    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

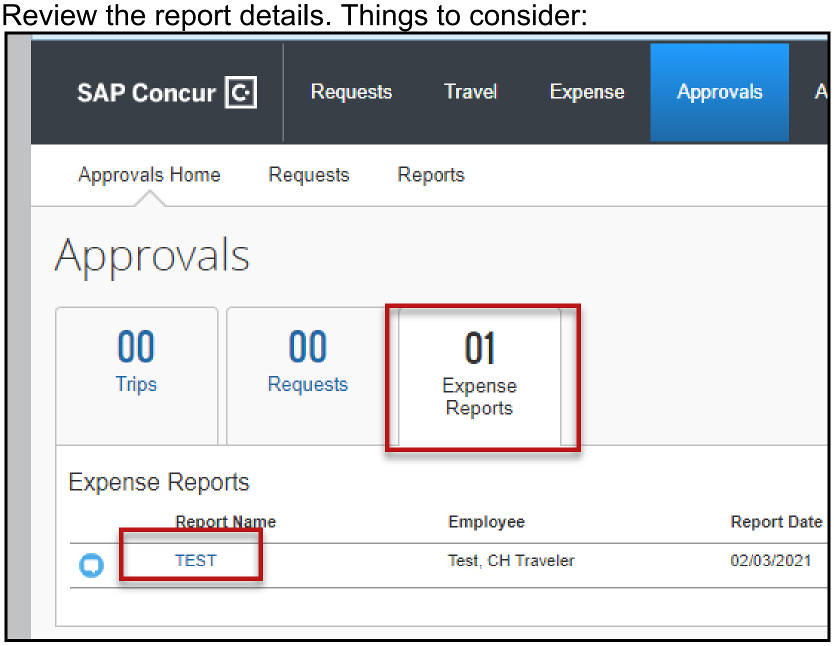
1. On the home page, in the **Required Approvals** section of **My Tasks**, click on **Required Approvals** title of the **blue arrow** to the right.

   OR

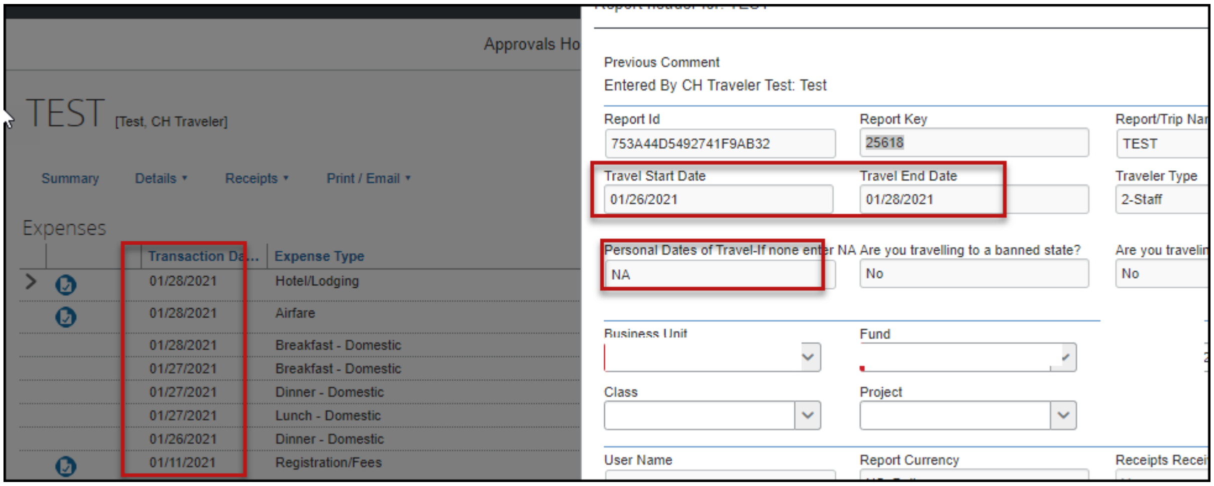
   On the home page, in the Quick Task Bar, click the **Required Approvals** tile.

   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:

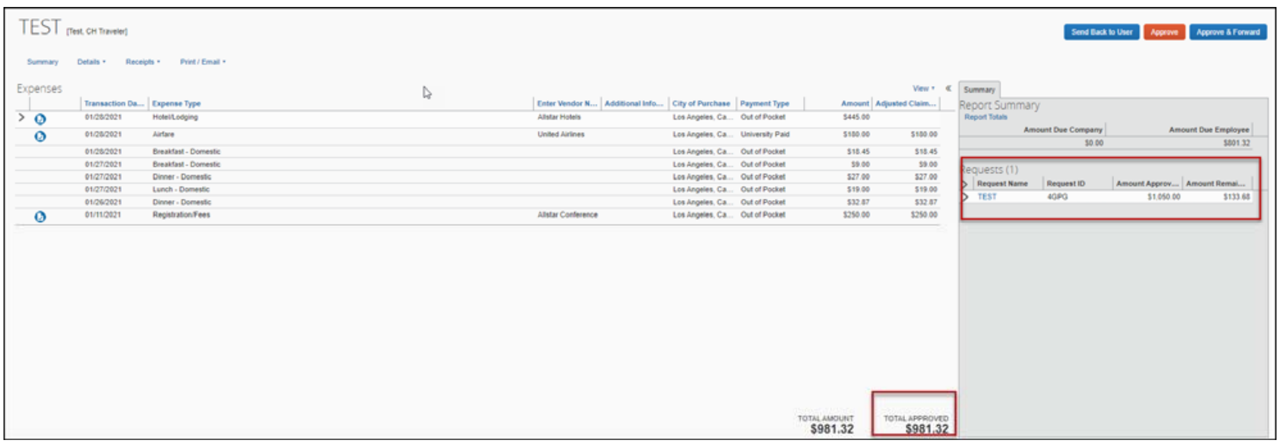


a. Review dates and locations of expenses compared to the original request.



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.



d. Review all expenses for reasonableness and completeness.

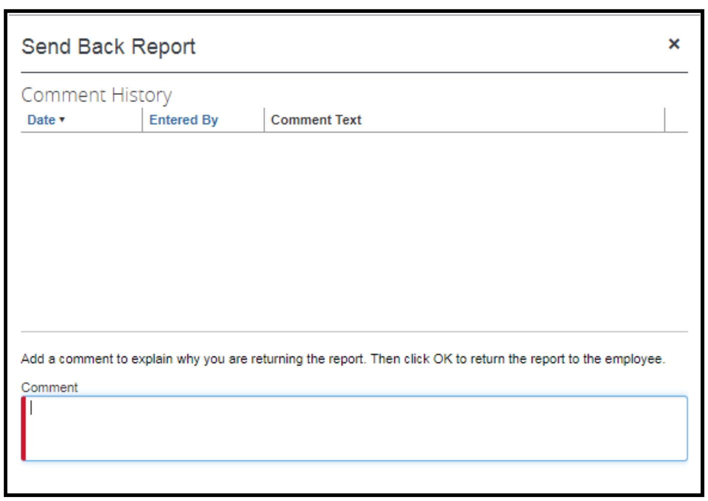
Approving an Expense Report

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:

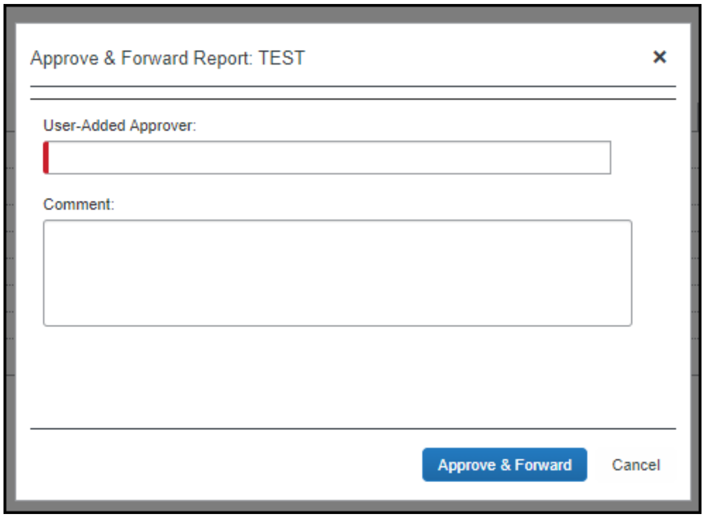
1. Click **Send Back to User**. The **Send Back Report** window appears.
2. Enter a **Comment** for the employee explaining why you are returning the report.
3. Click **OK**.



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.

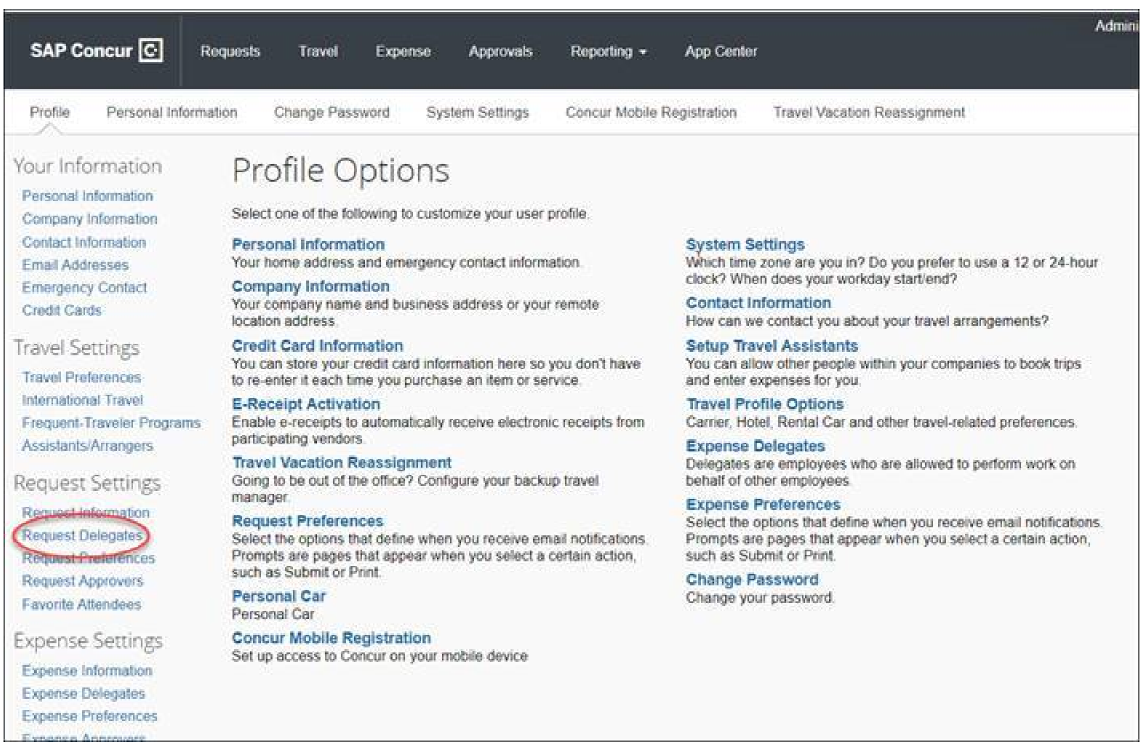


Delegating Approver Duties

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

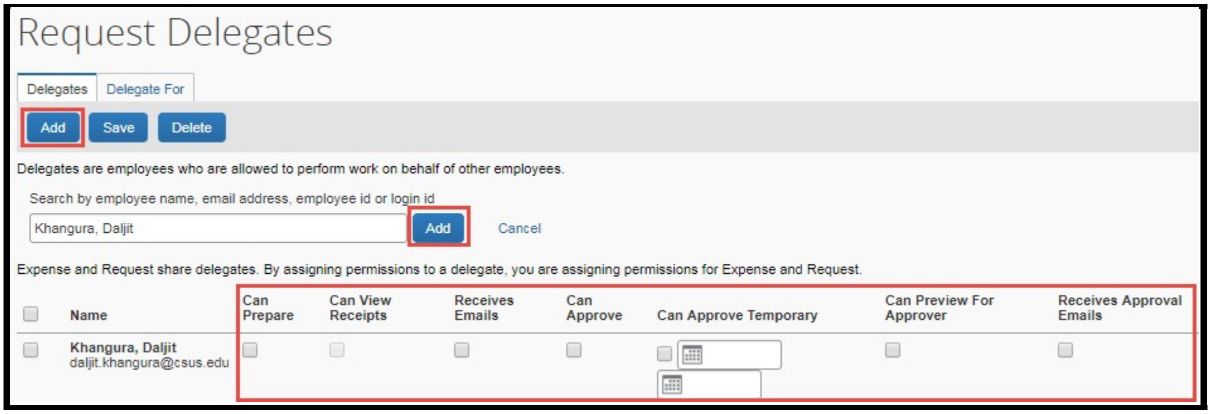
To add a delegate:

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



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 <u>only be available for Approvers in the system</u>. 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.