The California State University

Concur
Reference Guide
Approval

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Approval

Approving a Travel Request

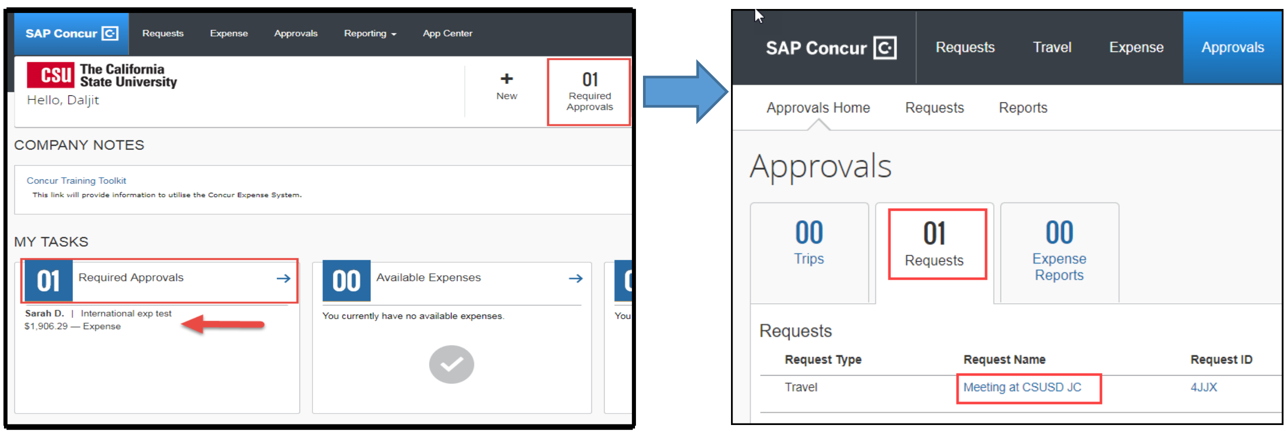
The approver will see requests awaiting approval under Required Approvals on the Concur home page.

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

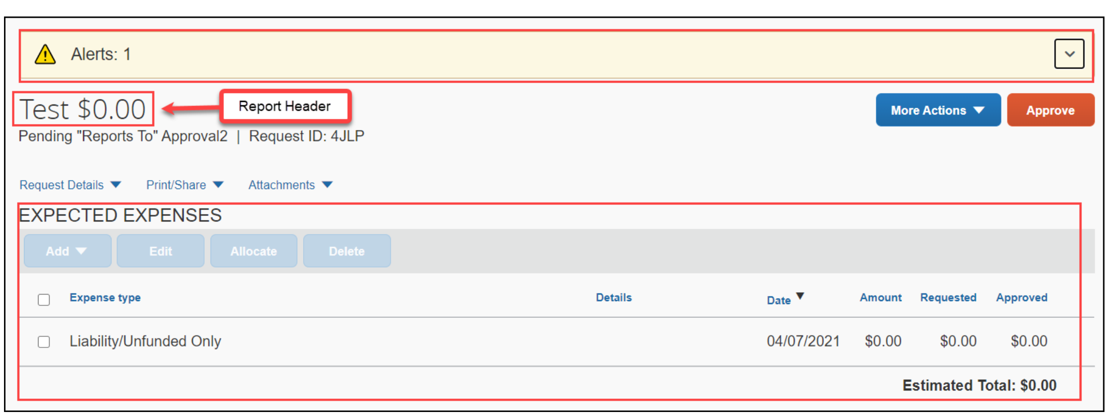
OR

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.



1. Select the Request you wish to approve by clicking the **Request Name**.
2. Review the **Request Header**, **Expected Expenses,** and any **Alerts**. 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 attachments to obtain further information about purpose of trip.
   d. Review all expenses for reasonableness and completeness.



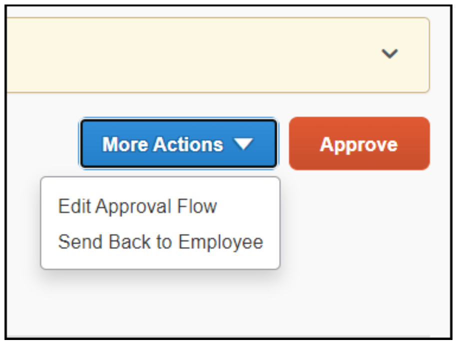
3. There are three approval options.

    a. **Approve** – approve the Request.

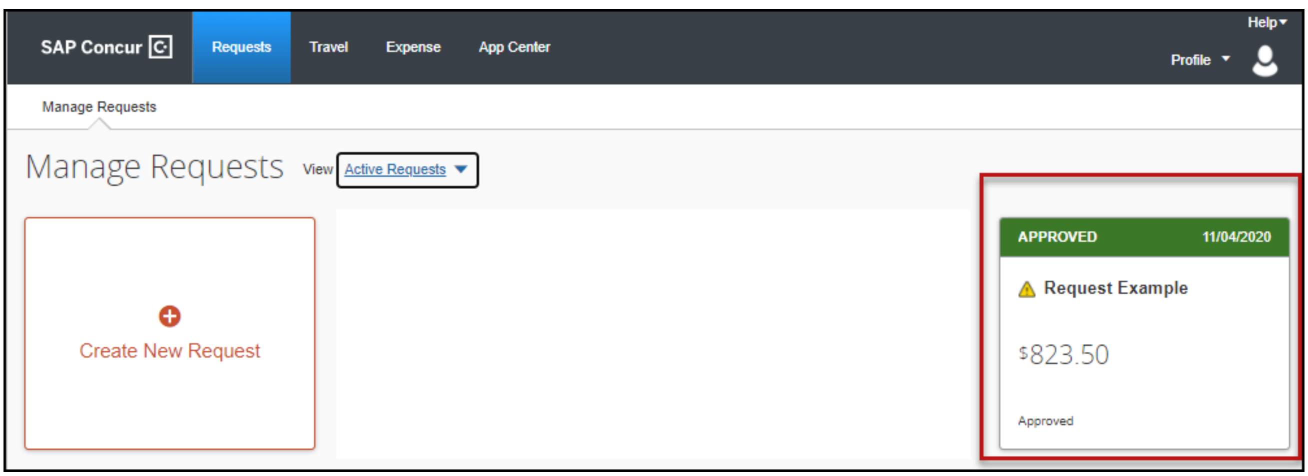
Under More Actions:

   b. **Edit Approval Flow** – Allow you to add additional approvals into the workflow. Click **+ Add Step** to enter a **User-Added Approver** box, type in 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.

   c. **Send Back to Employee** – Return the Request to the traveler. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.



Once Travel Requests have 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

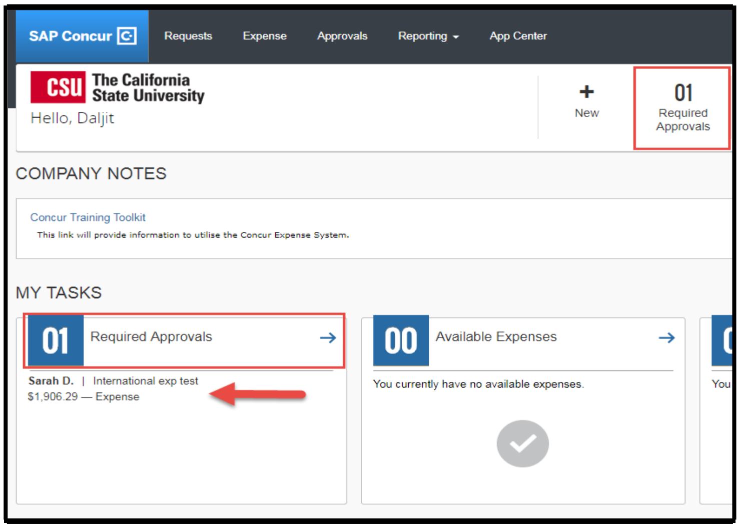
Reviewing an Expense Report

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

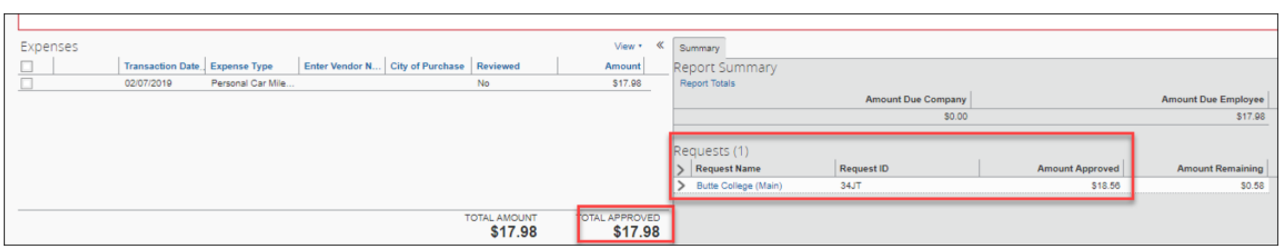
OR

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.



1. 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. Look at any Exceptions.
    d. Compare the total amount being claimed for reimbursement with what was requested.



    e. Review all expenses for reasonableness and completeness.

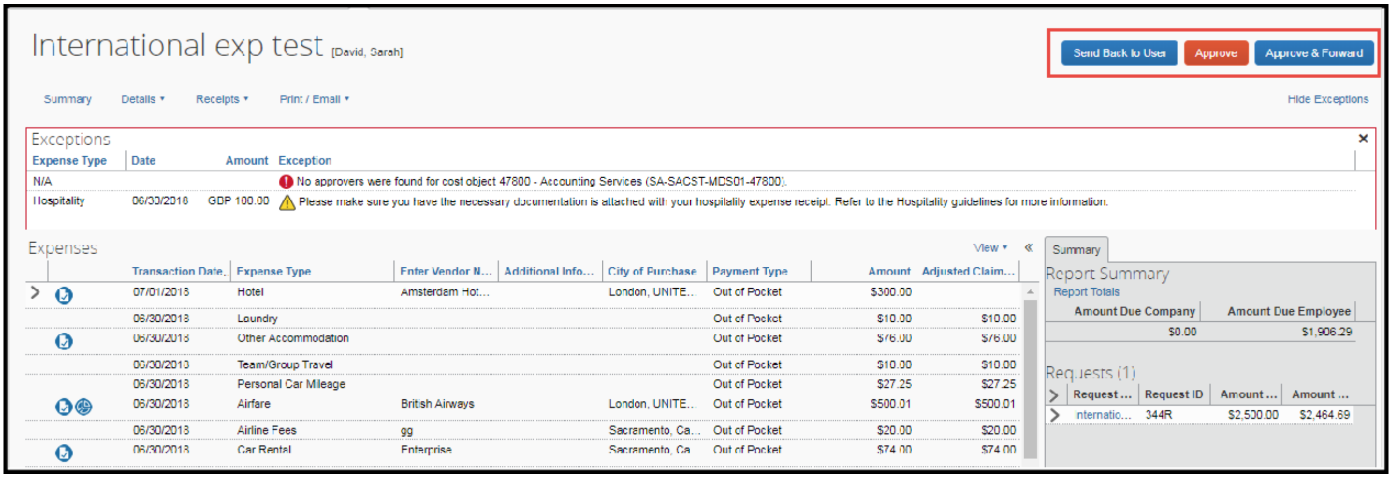
Approving an Expense Report

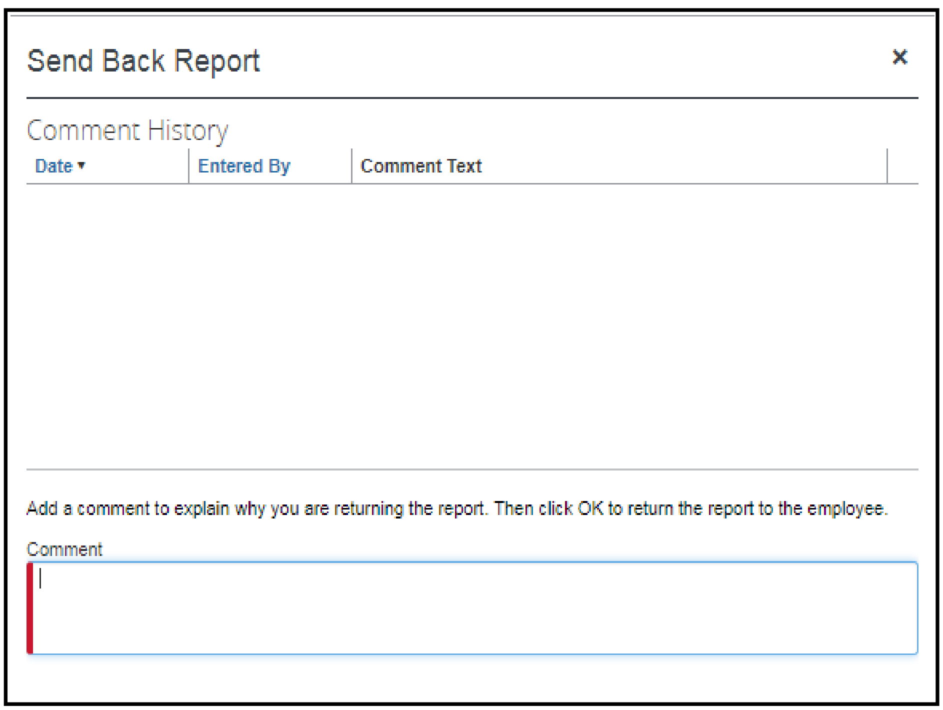
If you are satisfied with the Expense Report, click **Approve** in the top right corner of the screen.

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**.

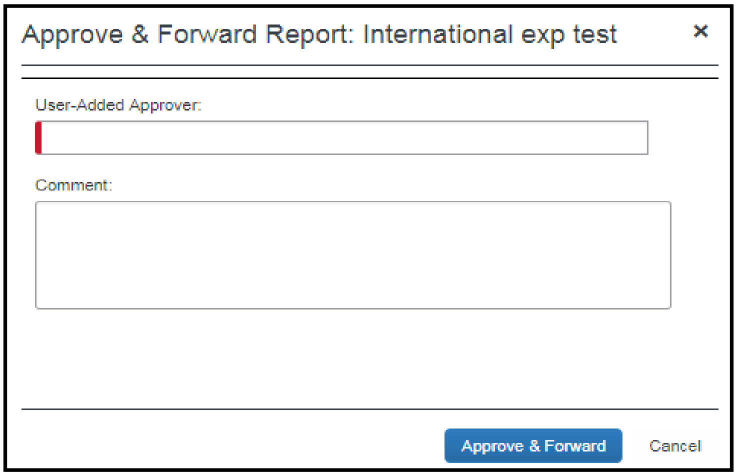




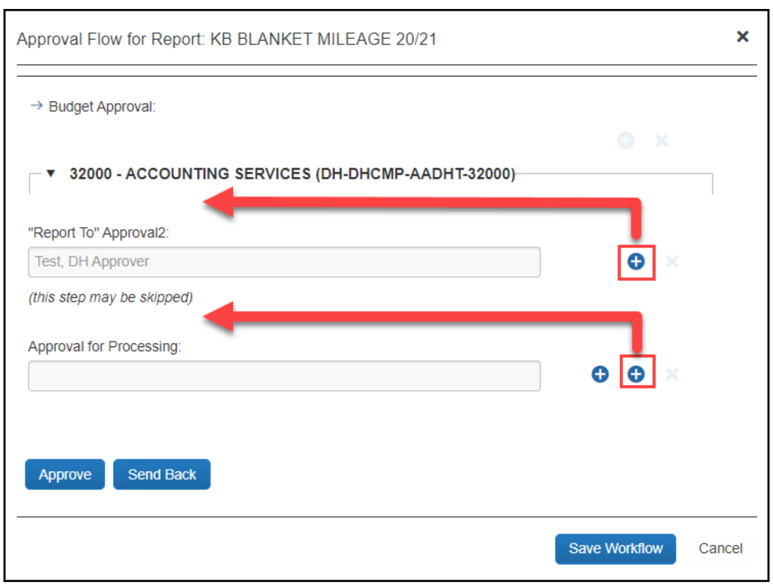
Adding an Additional Reviewer/Approver Step

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.



4. For Budget Approvers- Click Details and select Approval Flow before approving. You will have the ability to add an additional approver to the workflow. See screenshots below.
    - If you want to add an additional User-Added Approver after the Budget Approval, you can do so by clicking on the addition sign next to the "Report To" Approver2 line. The right addition sign next to the Approval for Processing line will enter an additional approver after the "Report To" Approver.

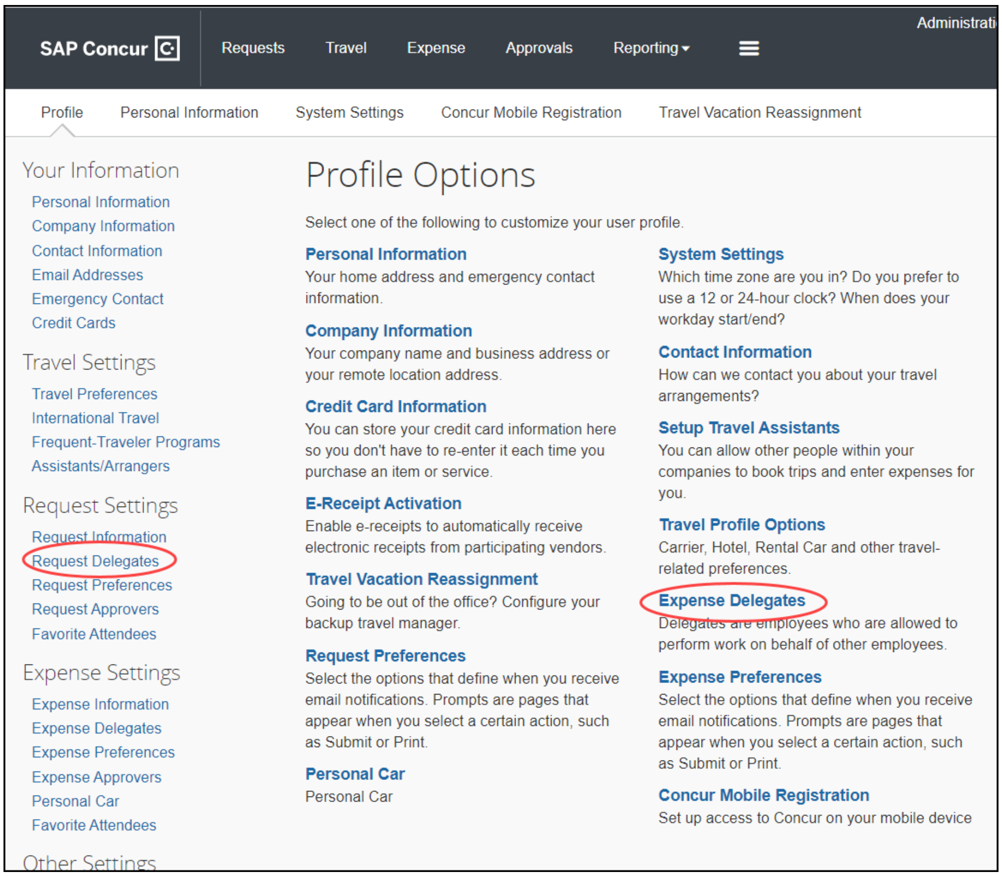


Delegating Approver Duties

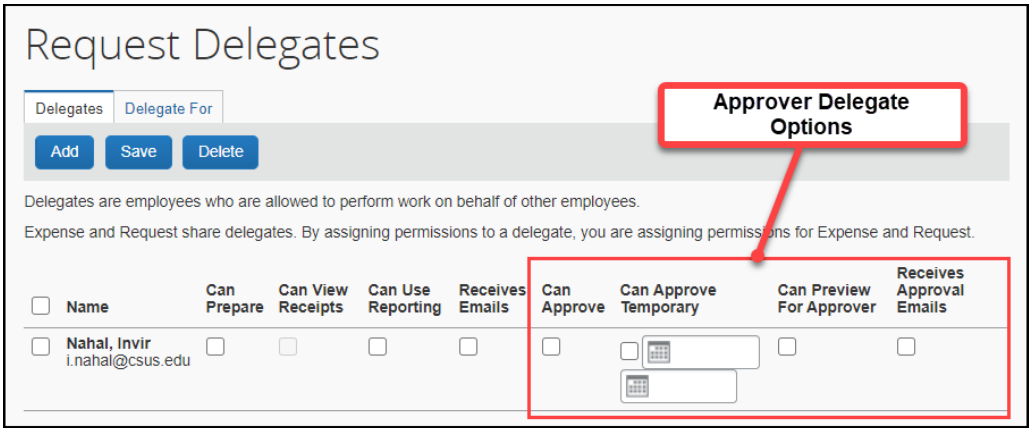
In the case of an absence an approver can delegate the approval step to another person for a temporary window of time.

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** or under Profile Options select **Expense Delegates**. Either area will auto update the other.



2. On the **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.** You may also search by first name or email address.
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. ***Note: Make sure “receive approval emails” is checked or delegate will not receive notification of pending approvals.***



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 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.
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. *Note: Allows delegate to review request/reports prior to you approving.*
Receives Approval Emails	If selected, the delegate receives a copy of each Expense approval-related email that you receive.

** These options are regarding your own travel requests and expense reports. These are not used for delegate approval options.*

***(*)** The option to delegate approver rights will <u>only be available for Approvers in the system</u>. The approver's rights can 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.