Step-by-Step Guide:

Approving Concur Requests and Expense Reports

1. From the Concur Home Page, find the “Required Approvals” section. Any Request or Expense report pending your approval will show here.

   1a. If you just have one to a few approvals, you should be able to see them all in the “Required Approvals” box. If you have more, you can click on the blue arrow beside where it says “Required Approvals” and this will take you to the Approvals Screen.

2. Select the item you will approve by clicking on its name in the list. Note there are separate tabs for Request approvals and Expense Report approvals once in the Approvals screen. The following sections will guide you through approving Requests and Expense Reports respectively.
Approving Requests

1. Click on the Request Name from the list on the Approvals Screen, or from the “Required Approvals” box on the home screen.

2. Review the information in the Request Header Tab.

3. Click the Expense Summary tab to review the requested expenses.

4. Hover over the Cost Object Allocation Icon to review the total amount being charged to your budget(s). Note that you may only be approving a portion of the request.
Approving Requests, Continued.

5. If everything is correct and appropriate, click Approve in the top-right area of the screen, review the Approver Agreement, and click Accept.

5a (Corrections Needed). If you have questions or require the requester to amend the request in any way, click the “Send Back Request” button. You will be required to enter a comment informing the requester of the adjustments needed, and then click OK. You will be notified via e-mail when the user has resubmitted their Request.
Approving Expense Reports

1. Click on the Report Name from the list on the Approvals Screen, or from the “Required Approvals” box on the home screen.

2. Review the Report Summary and Expenses
   - Individual transactions are listed on the left pane of the report, the summary shows by default in the right pane.
   - Click on individual transaction line items to view their details in the right pane.

   - Transaction details include all of the general expense information, but also attendees (for group meals) and any additional explanation the user provides.
Approving Expense Reports, Continued

3. Review Receipts
   - Click “Receipts” —> “View Receipts in new window” OR “View Receipts in current window”. You may also hover over the receipt icon next to the expense to view the receipt.
   - Note: For most expense types, the system requires a receipt for all transactions $25 and over. Receipts for all transactions to be charged to a Grant will be required, regardless of the amount.

4. Review the amounts you are approving and the budget account(s) to which they will post.
   - Hover over the blue icon under the words “Cost Object Approved Amount” to view the summary of what you are approving.
Approving Expense Reports, Continued

5. If everything is correct and appropriate, click “Approve” in the top-right area of the screen, review and “Accept” the electronic approver agreement.

5a. If corrections are required, click “Send Back to User” and leave a comment explaining what corrections are needed. Example: If the traveler spent excessively on alcohol during a meal, you can send back the report with a comment that the user should itemize x amount of said transaction as the “personal” expense type.

Notes:

- If you wish, you may print or Email yourself a copy of the expense report by clicking “Print/Email”.

- You may review the general trip header information by clicking “Details” — “Report Header”. If the traveler did not attach a Request with their expense report, their explanation will be found in the report header “Additional Information” field.

- As the Expense Report approver, when you Approve a report you are certifying that all expenses contained within the report are within Trinity University policy and that all required and accurate receipts are attached. Please review all reports with appropriate diligence to ensure travelers remain compliant with University policy. Policy requirements are built into the system configuration to assist the user in preparing the report, but it is still possible they may submit something as a business expense which should be marked as personal, or attached non-itemized receipts, etc...