



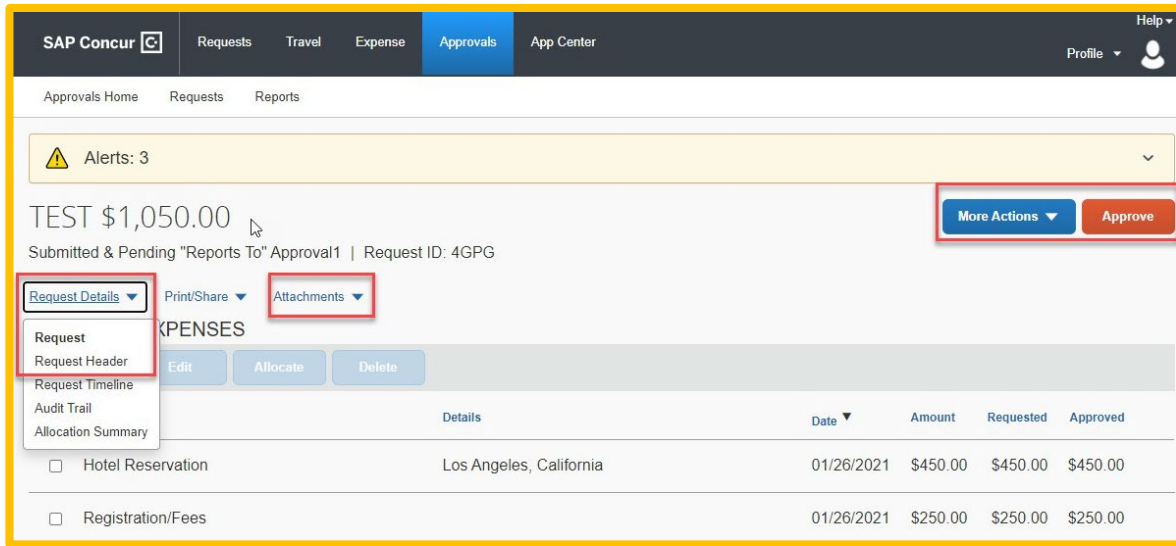
Table of Contents

Reviewing and Approving a Travel Request.....	2
Reviewing and Approving an Expense Report	3
Reviewing an Expense Report	3
Approving an Expense Report	5
Sending Back an Expense Report.....	6
Adding an Additional Reviewer/Approver Step.....	6
Delegating Approver Duties.....	7
To Add a Delegate	7

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.

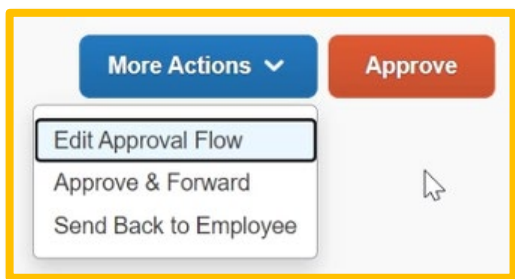
1. Select the Request you wish to approve by clicking the **Request Name**.
2. Review the **Request Details** and select Request Header and review the **Expected Expense** information. Things to consider:



The screenshot shows the SAP Concur interface for reviewing a travel request. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The main content area displays the request details for 'TEST \$1,050.00' with a status of 'Submitted & Pending "Reports To" Approval1' and Request ID '4GPG'. A dropdown menu for 'Request Details' is open, showing options: Request, Request Header, Request Timeline, Audit Trail, and Allocation Summary. The 'Request Header' option is selected. Below the dropdown, there are buttons for 'Edit', 'Allocate', and 'Delete'. A table of expenses is visible, with columns for 'Details', 'Date', 'Amount', 'Requested', and 'Approved'.

Details	Date	Amount	Requested	Approved
Hotel Reservation	01/26/2021	\$450.00	\$450.00	\$450.00
Registration/Fees	01/26/2021	\$250.00	\$250.00	\$250.00

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

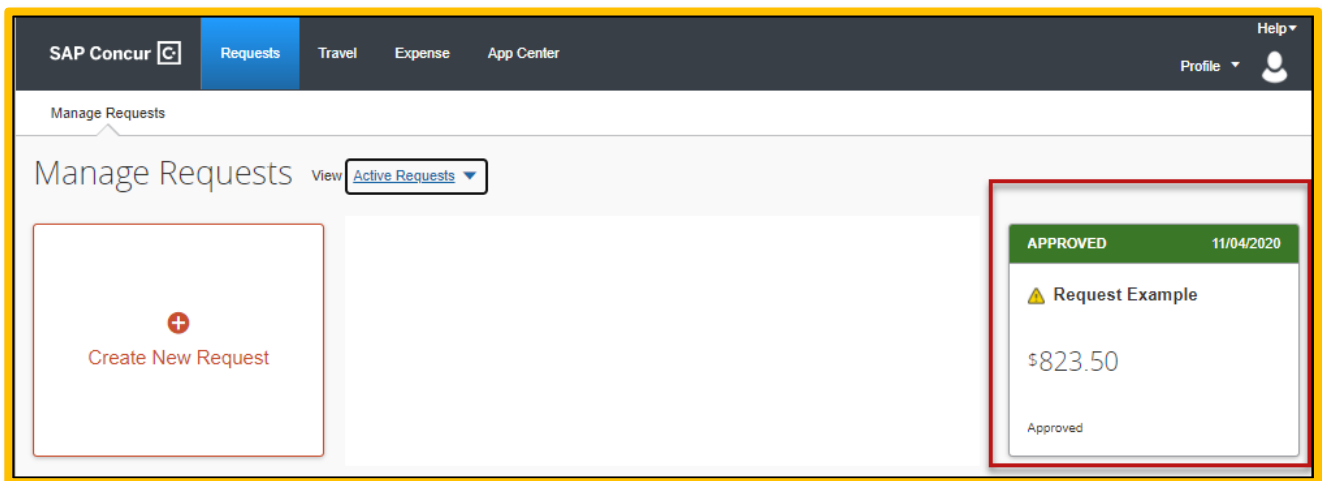


The close-up screenshot shows the 'More Actions' dropdown menu. The options listed are 'Edit Approval Flow', 'Approve & Forward', and 'Send Back to Employee'. A mouse cursor is pointing at the 'Approve & Forward' option.

a. 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 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. **Approve & Forward** – approve the Request and forwards it to the next approver
- iii. **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.

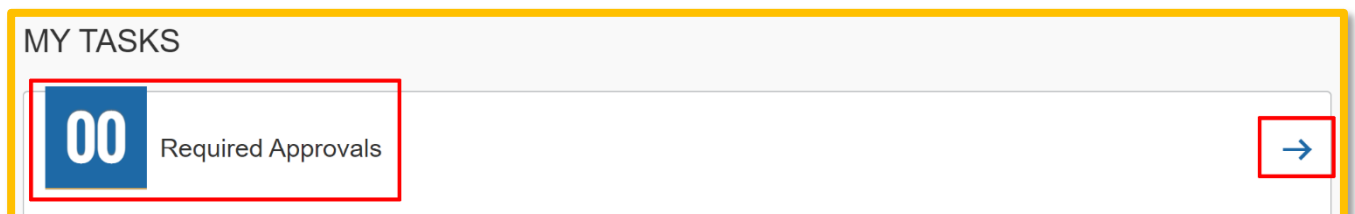
Once the Travel Request has been acted on by the approver, notification regarding the status will be sent to the traveler (and the delegate if opted into notifications) and the status will be noted on the traveler’s **Manage Requests** page.



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 or the **blue arrow** to the right.

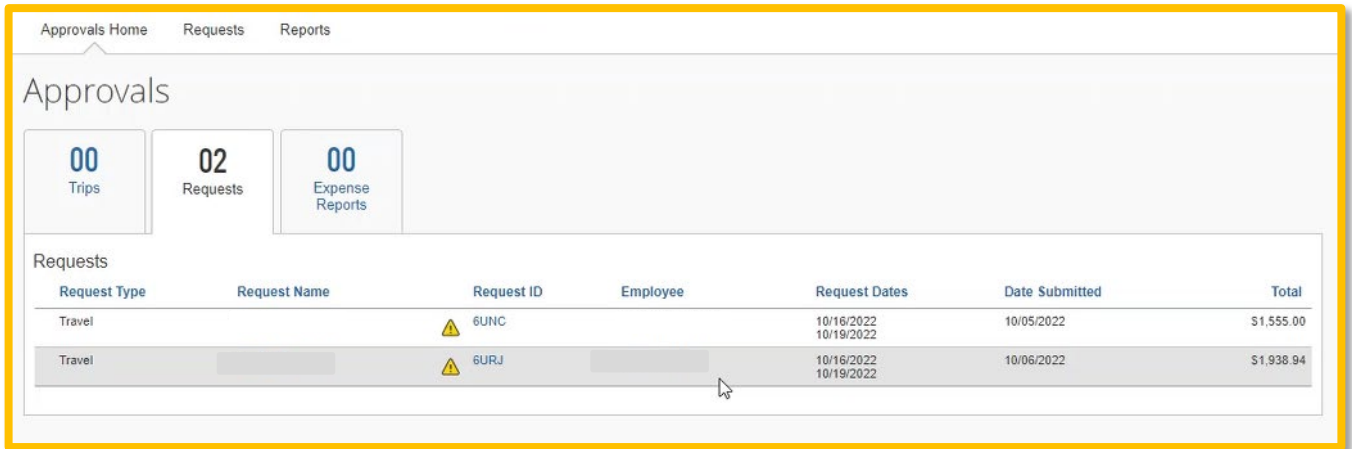


OR

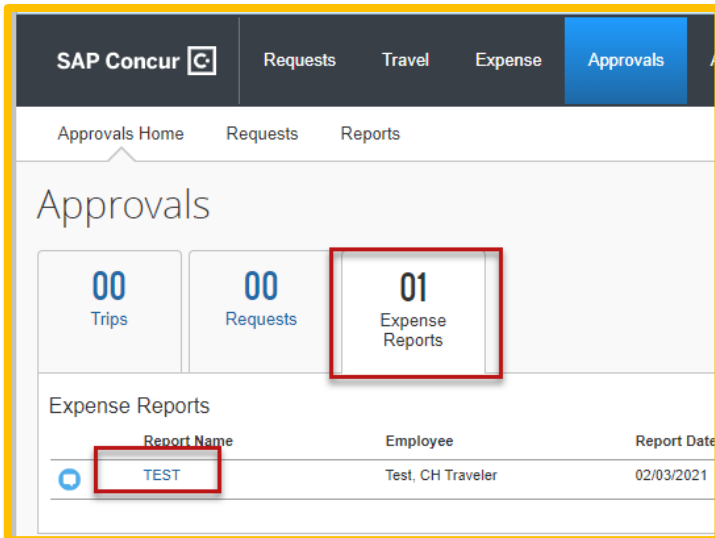
On the home page, in the Quick Task Bar, click the **Required Approvals** tile.



2. Under the **Requests** tab, the **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.



3. Under the **Approvals Home** tab, review the expense report details on the **Expense Reports** tab. Things to consider:



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

The screenshot shows an expense report for user 'TEST'. The 'Expenses' table lists transactions from 01/11/2021 to 01/28/2021. The summary section on the right includes the following fields:

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

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 detailed view of the expense report. The 'Expenses' table includes columns for Transaction Date, Expense Type, Enter Vendor N..., Additional Info..., City of Purchase, Payment Type, Amount, and Adjusted Claim. The summary section on the right shows the following totals:

- Report Summary: Amount Due Company: \$0.00, Amount Due Employee: \$891.32
- Requests (1): Request Name: TEST, Request ID: 4GPG, Amount Approved: \$1,650.00, Amount Remaining: \$133.66
- 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.

The screenshot shows an expense report for 'International exp test'. The 'Exceptions' section displays a warning: 'No approvers were found for cost object 47800 - Accounting Services (SA-SACST-MDS01-47800)'. Below this, the 'Expenses' table lists transactions from 01/01/2015 to 01/30/2015. The summary section on the right shows the following totals:

- Report Summary: Amount Due Company: \$0.00, Amount Due Employee: \$1,906.29
- Requests (1): Request Name: International..., Request ID: 144R, Amount Approved: \$2,500.00, Amount Remaining: \$2,464.69

Sending Back an Expense Report

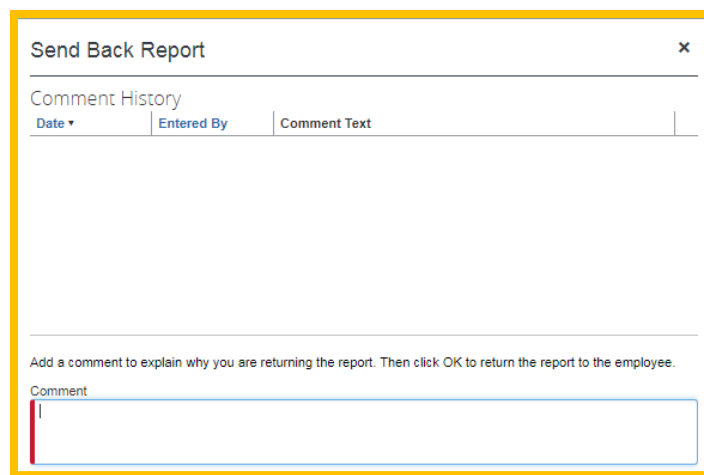
During your review, you may choose to return the entire expense report to the employee for correction. To return a report:

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**.

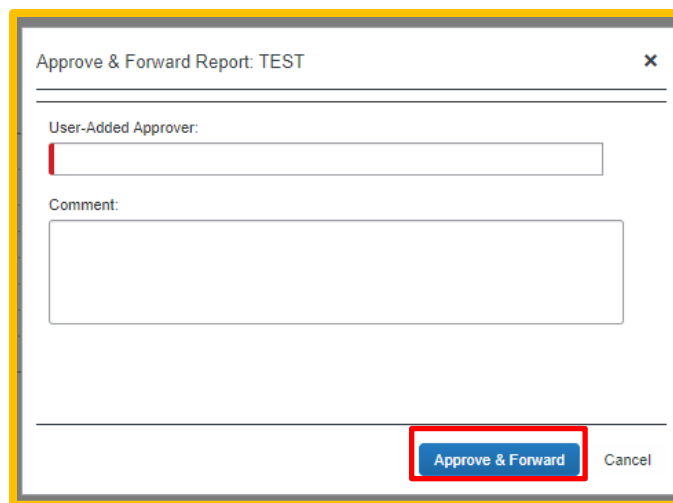
Adding an Additional Reviewer/Approver Step

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 corner 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.



The screenshot shows a dialog box titled "Send Back Report" with a close button (X) in the top right corner. Below the title bar is a "Comment History" section with a table containing three columns: "Date", "Entered By", and "Comment Text". The table is currently empty. Below the table is a text input field labeled "Comment" with a red vertical bar on the left side, indicating it is the active field. Below the input field is a small instruction: "Add a comment to explain why you are returning the report. Then click OK to return the report to the employee."



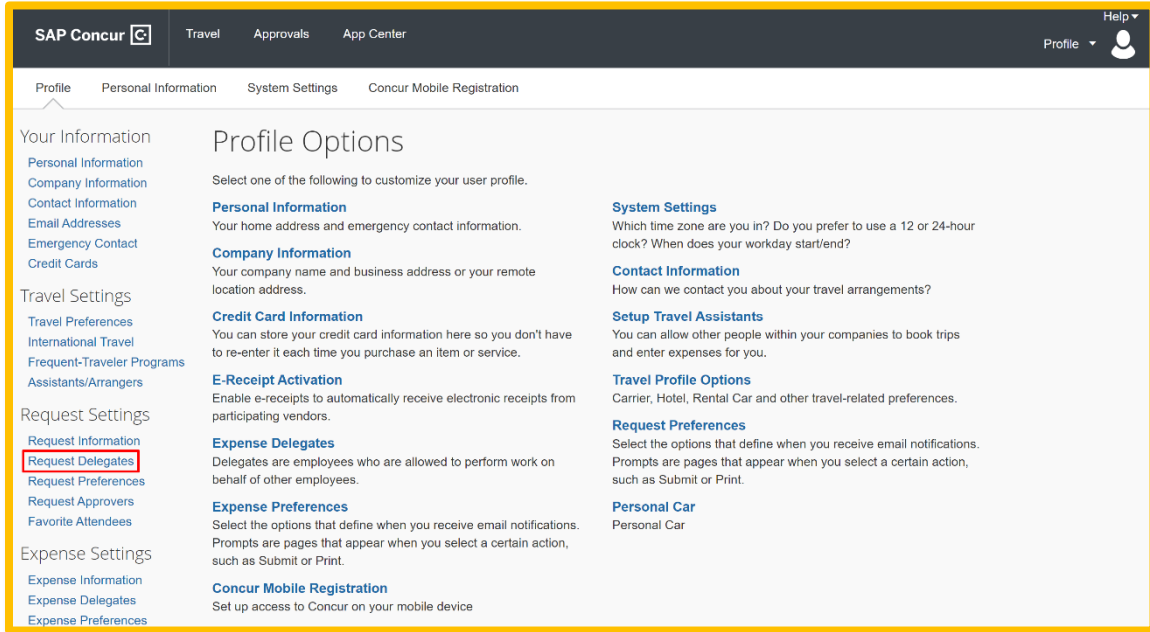
The screenshot shows a dialog box titled "Approve & Forward Report: TEST" with a close button (X) in the top right corner. Below the title bar is a "User-Added Approver:" label followed by a text input field with a red vertical bar on the left side. Below the input field is a "Comment:" label followed by a larger text input field. At the bottom right of the dialog box, there are two buttons: "Approve & Forward" (highlighted with a red box) and "Cancel".

Delegating Approver Duties

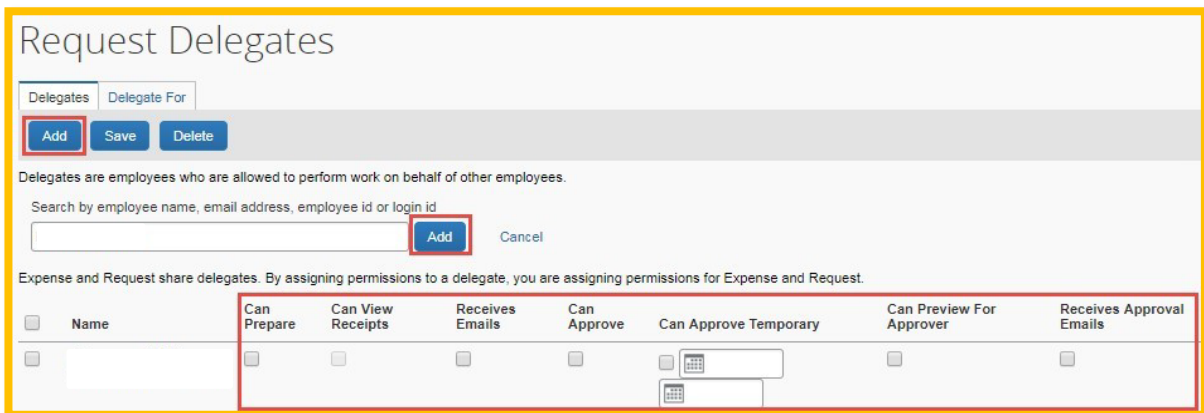
In the case of an absence an approver can delegate the approval step to another person for a temporary window of time.

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**.



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. Click **Add**.
4. Check the boxes that correspond with the permissions you are granting to the delegate. For example, if you wanted to delegate the approval function only you would check "Can Approve Temporary" to 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 dates.

() 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 (e.g., Dean unavailable so approvals would be routed to Associate Dean).*

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