

Step-by-Step Guide

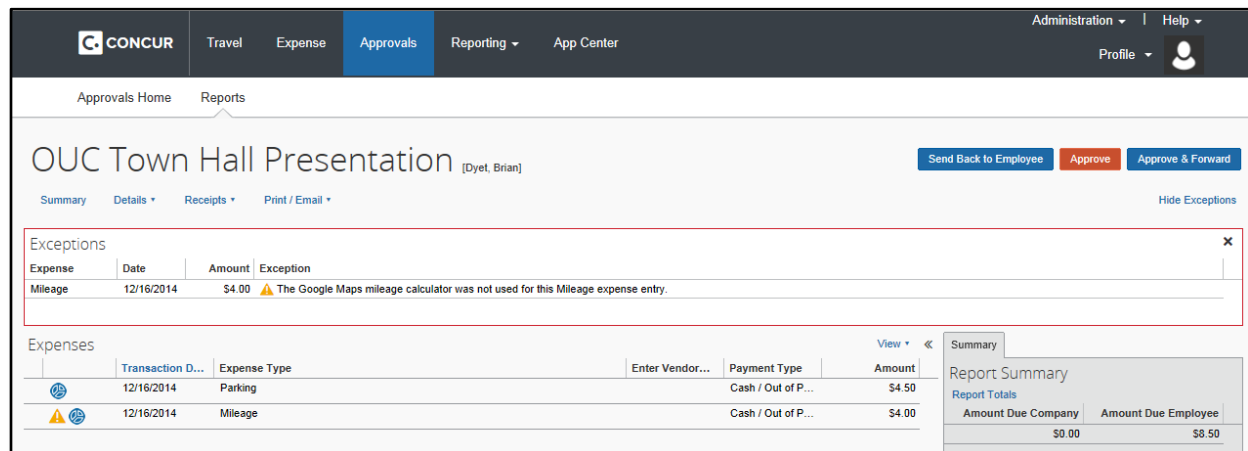
Approving Expense Reports in the Concur Travel & Expense System

The steps to approve an expense report are the same whether it is a Travel Reconciliation expense report or a Procurement Card expense report. You will receive a system-generated email when an expense report has been submitted for your approval.

Begin by accessing Concur via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **Concur Travel & Expense System** link.

There are several ways to access your approval queue in Concur. One way is to use the buttons located in the upper right corner of your Concur home page and click **Required Approvals**. Select the report you would like to approve.


The expense report will appear.



The screenshot displays the Concur web interface. At the top, there is a navigation bar with 'CONCUR' and tabs for 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Approvals' tab is active. Below the navigation bar, the page title is 'OUC Town Hall Presentation' with a user name '[Dyet, Brian]'. There are buttons for 'Send Back to Employee', 'Approve', and 'Approve & Forward'. Below the title, there are links for 'Summary', 'Details', 'Receipts', and 'Print / Email'. A section titled 'Exceptions' is highlighted with a red border, showing a table with columns 'Expense', 'Date', 'Amount', and 'Exception'. The table contains one row: 'Mileage', '12/16/2014', '\$4.00', and 'The Google Maps mileage calculator was not used for this Mileage expense entry.' Below the exceptions, there is a table for 'Expenses' with columns 'Transaction D...', 'Expense Type', 'Enter Vendor...', 'Payment Type', and 'Amount'. The table contains two rows: '12/16/2014', 'Parking', 'Cash / Out of P...', '\$4.50' and '12/16/2014', 'Mileage', 'Cash / Out of P...', '\$4.00'. To the right of the expenses table, there is a 'Report Summary' section with 'Report Totals' and a table for 'Amount Due Company' (\$0.00) and 'Amount Due Employee' (\$8.50).

To review the details of a specific expense, click anywhere on the expense's line and the details for that expense will appear. If desired, you can enter comments for an individual expense.

After reviewing each expense, click **Save**.

To review an expense's allocation, hover your mouse over the pie-chart icon  to the left of the expense and the Allocations pop-up appears.

As an approver, you have the ability to change how an expense is allocated. Select the expense by clicking anywhere on the expense's line, then click the **Allocate** button in the lower right corner of your screen. Once the allocations appear correctly, click **Save**.

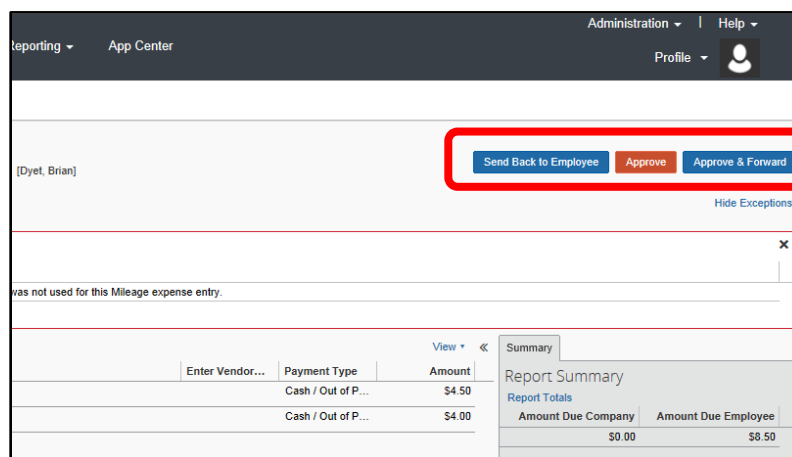
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To verify that all required documentation is attached and legible, click the **Receipts** dropdown and use the resulting menu to view receipts in either the current window or a new window. Each attached file will appear as a separate bookmark.

Note: As an approver, you also have the ability to attach documentation to an expense report.

Use the buttons in the upper right corner of your screen to take action on this expense report.



To approve this expense report as is, click **Approve**.

If you have questions and want to deny this expense report, click **Send Back to Employee**. In the pop-up window that appears, describe why you are returning this expense report to the employee.

If you want to approve this expense report and add an additional approver, click **Approve & Forward**. Search for and select the next approver.

The Approval Flow page may appear. If it does, review the approval path and click **Approve**.

You will be sent to your approval queue to repeat the process for each expense report pending your approval.

You have now completed the expense report approval process.