Approve an Expense Report

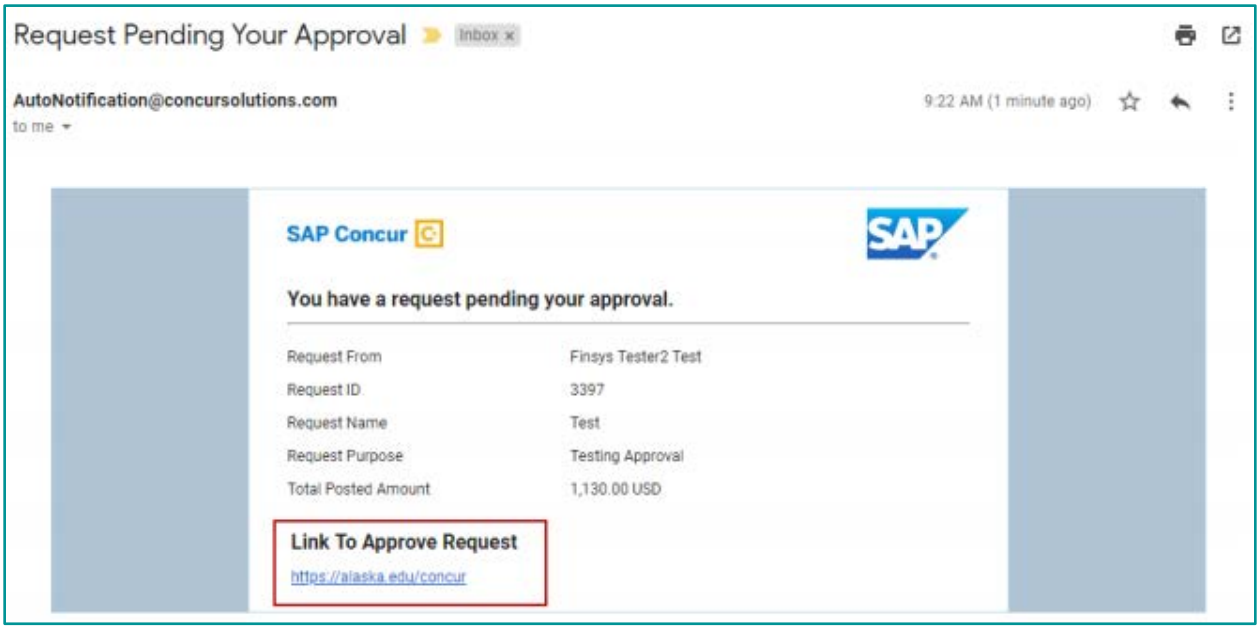
Required Approvals

Concur is programmed to apply most regulatory approval requirements to the [expense] Report. (R05.02.060.A.(15)(b))

1. Expenditure authority approval if over 10% and $200 of the Request estimate
2. Expenditure authority approval if the funding source changes from the Request
    a. Allocated expenses are not automatically routed for re-approval
    b. The Processor routes the Report to additional approvers as required
3. Supervisor/Default Approver approval if the traveler is the expenditure authority
4. Optional Department Approver as assigned to the traveler's profile in Concur
5. [Expense] Processor (campus travel auditor) approval on all Reports

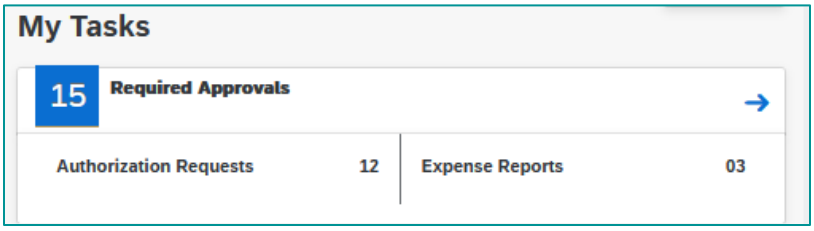
Approve

1. The approver receives an email notifying them of a Request or Report pending their approval

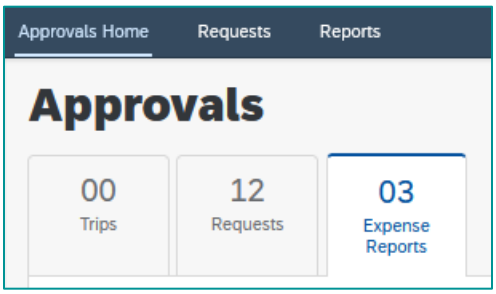


2. Sign into Concur or click the link provided in the email

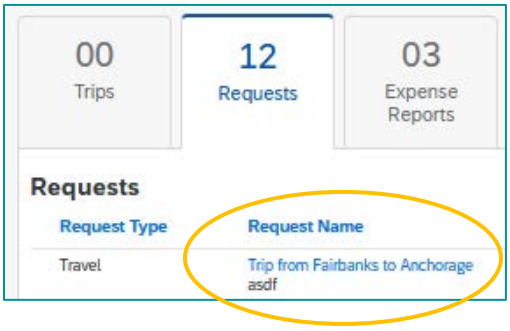
3. Access pending approvals from either
    a. My Tasks: Required Approvals on the homepage dashboard or



    b. The Approvals module



4. Select Requests or Expense Reports to access documents pending approval
5. Click on the Request/Report Name to open the document

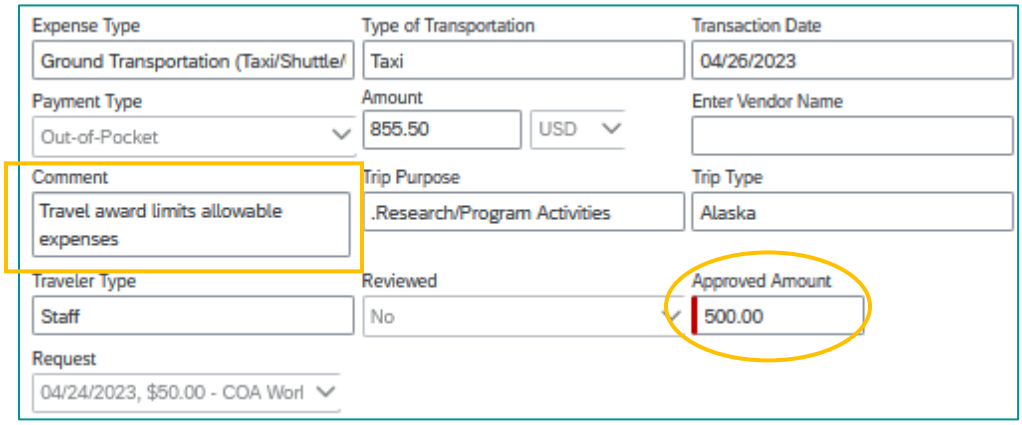


Report

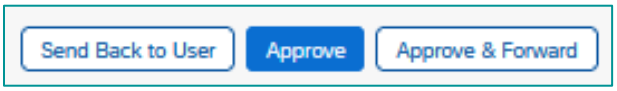
1. Open the Report Header to view primary trip information
2. Open the "Detailed Report" to view a full summary of all expenses, payment types, and associated allocations

3. Select individual expenses to view their details
4. Attach additional receipt images and documentation if needed

5. Adjust the Approved Amount of an expense if needed



6. Once reviewed, select one of the following actions:



   a. Send Back to User –If the Report needs corrections or is not approved, this sends it back to the traveler for correction and resubmission
   b. Approve – Moves Report to the next step in the Approval Flow
   c. Approve & Forward – Opens window to approve and send Report to an additional approver