TRAVEL APPLICATION

Approvals

HELPFUL HINTS

- Financial approvers need to review submitted expense reports and approve them for reimbursement. On the Concur home page, in the My Tasks section, a list of any report waiting for approval is displayed.

PROCEDURE

1. For quick access to reports to approve, click Approvals on the top of the screen.

2. At the top of the approvals home page will display the number of expense reports awaiting approval. The list is also displayed in the quick approval view pane.

3. To open an expense report for review, click the report name. All of the report expenses appear in the expenses list. Any exceptions on the report will be displayed on the exceptions section. Exceptions are notifications or warnings that require attention but the exceptions will not restrict a financial approver from approving an expense report.
After reviewing expenses, receipts, and any exceptions, approvers can take action to send back an expense (for corrections or to deny the report) or approve the expense. **Note:** To add another approval layer to an individual expense report, instructions begin on page three of this document.

To approve the expense report, click on Approve.

After reviewing and approving an expense report, the report no longer appears in the Reports Pending list. The approved expense report is routed to accounts payable for processing. No further action is needed.
If an additional approver is needed prior to this individual expense report being submitted to accounts payable for processing, click on the Details dropdown menu and select Approval Flow.

1. From the pop-up window, select the right button to add an approver prior to A/P audit.
2. Search for and select an additional approver by entering their last name in the User-Added Approver field – you must select an option from the list displayed or repeat the search using a different last name.

   (Optional) Position cursor in the first field and select the drop-down arrow for ‘Search Approvers By’ to search by email address or other criteria.

3. Once the user-added approver is selected, click on Save Workflow.
4. Click on Approve. No further action is needed.
**REMOVE USER-ADDED APPROVER**

To remove a user-added approver *prior to the expense report being approved/submitted*, click on the Details dropdown menu and select Approval Flow.

Click the red X next to the user-added approver field to remove the additional approver. Click on **Save Workflow**.

Click on Approve. No further action is needed.