Approval Basics

**Approver Emails**
1. Approvers will receive an email when it is time to approve an expense report, the email will contain:
   - Report From: Traveler name
   - Report Name: Expense report name
   - Report Purpose: Business purpose specified on the report header
   - Requested Amount: Total report amount
   - Expense Line Details: Expense type, transaction date, object code, line-level business purpose, city of purchase, payment type and amount
2. Users will need to log into Concur to approve the expense report

**Days to Approve**
1. Approvers should review and take action on expense reports in a timely manner
2. If an approver does not take action in 10 calendar days the report will be sent back to the traveler for resubmission or to the Back Office with an error

**Access Pending Approvals**
There are multiple ways to access pending approvals:
- On the Concur dashboard, click Required Approvals
- At the top of the Concur page, click Approvals
- Under My Tasks, click Required Approvals

**Access Prior Approvals**
1. At the top of the Concur page, click Approvals
2. Click the Reports tab, then click the View dropdown

Reviewing an Expense Report

**Reviewing the Report Header**
The report header contains the basic data about the expense report including: report name, business purpose (which may be different than the line-level), default coding, comments and the additional pay indicator
1. Click on the Expense Report title to view the report header

**Reviewing Account Coding**
There are multiple ways to view the coding on an expense report:
- Click the Expense Report title to view the default coding for the report
- If a line has coding other than the default, you will see a blue pie chart icon, hover over this icon to show coding
- Click the Print/Email dropdown at the top of the page, then select HU-Detailed Report with Summary Data. Once the report opens, click Show Itemizations at the top of the report. This report will also show the object code an expense is mapped to

**Reviewing Receipts**
1. If there is a blue receipt icon a receipt is attached directly to an expense
2. There are multiple ways to view receipts:
   - Hover over the blue receipt icon
   - Click the Receipt Image tab of an expense
   - Click the Receipts dropdown and select View Receipts in a New Window or View Receipts in the Current Window (this will show all receipts, including receipts attached to the report header)

**Review Exceptions**
An exception is a warning or message related to a specific entry. Often, there is a message associated with an exception indicating recommended action. Exceptions appear directly under the expense report title. There is a Hide Exceptions/Show Exceptions button on the far right of the exceptions box.

**What Can an Approver Do?**
1. Line-level business purpose can be edited
2. Amount approved can be adjusted down
3. Coding can be changed, deleted or added
4. Some Expense Types may be modified
5. Additional receipts/images can be attached
6. Expense reports containing Add Pay can be flagged
**Taking Action on an Expense Report**

**Sending a Report Back to a User**
1. Click the Send Back to User button
2. In the popup box, enter a Comment that gives a description of why the report is being returned
3. Click OK

**Approving a Report**
1. Click the Approve button
2. Read the agreement and click Accept
3. Click Approve to send the report to the next step in the workflow

**Approving and Forwarding a Report**
1. Click the Approve & Forward button
2. In the User-Added Approver field, enter the name of the approver you want to forward the report to.
   - When their full name appears in the list, click on it.
3. Enter a Comment specifying why the report was forwarded
4. Click Approve & Forward
5. Read the agreement and click Accept to route the report to the approver you added to the workflow

**Adding an Approval Workflow Step**
1. Click on the Details dropdown, then Approval Flow
2. Click on the black triangle icon(s) ▲ to view the complete approval workflow
3. Click the blue plus icon + to add a step into the approval workflow
4. In the User-Added Approver field, enter the name of the approver you want to add into the approval workflow
5. Click Save Workflow

**Approval Delegation**

An approval delegate is a user with approver access that can review and approve expense reports for another approver. Approval delegates can be set up to approve reports at all times or temporarily (vactions).

**Assigning an Approver Delegate**
1. Click the Profile button at the top right of the window and click Profile Settings
2. On the left side of the Profile Options page, under Expense Settings, click Expense Delegates
3. Click Add and a search bar will appear. Enter the name or HUID of the person you want to assign as your delegate (you will only be able to select a user that has the approver role in Concur)
4. Click the Add button to the right of the search field
5. Next to the delegate’s name, select Can View Receipts, Can Approve and Receives Approval Emails
6. If temporary, select the to and from dates
7. Click Save

**Approving an Expense Report as an Approver Delegate**
1. Log into Concur under your account
2. Click the Profile button at the top right
3. Click the Acting as Other User drop-down menu and select the name of the person for whom you are acting as an approval delegate for
4. Click Start Session. When the screen refreshes, the Profile drop-down will change to ‘Acting as’ followed by the individual’s name
5. Complete the appropriate review and approval steps

**Note:** Actions of approver delegates are tracked in the audit log of each expense report

---

**Approver Icon Quick Reference Guide**

- **Attendees:** An expense entry has associated attendees
- **Comments:** An expense entry has comments
- **Credit Card:** An expense entry was a corporate credit card transaction
- **Credit Card:** A corporate credit card transaction includes additional data
- **Exception:** An expense entry exception that must be resolved before submission/approval
- **Warning:** An expense entry warning that may require additional action
- **Allocation:** An expense entry has been allocated to coding different than the expense report header
- **Receipt Attached:** An expense entry has a receipt attached
- **Missing Receipt Affidavit:** An expense entry has an electronic missing receipt affidavit attached
- **Personal Expense:** An expense entry was marked as a personal expense
- **Chart of Accounts:** An expense entry that requires Chart of Accounts approval
- **Partial Approval:** An expense entry was partially approved