**Quick Reference Card**

**Concur – Approval**

**Approval of Concur documents will be handled through the approval queue in Concur.**

**Procedures**

Concur documents awaiting approval can be reviewed and approved in the Concur approval queue.

Once you have logged on to Concur, click on the Required Approvals tab.

In the approval queue, there will be tabs for Requests and Expense Reports.

Concur will default to the Expense Reports tab. Click in the correct tab to review the desired report.

Click on the Report Name to open the report for review and approval.
The report will open to the report Summary screen.

To review the Report Header, click on Details and then click on Report Header.
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Review the data entered on the report header for completeness and accuracy.

Click Save if you made any changes or Cancel to return to the report Summary screen.

NOTE: Although an approver can adjust the Cost Object Type and Cost Object ID at the header level, it is not recommended. Changes at the header level will affect all expenses on the report and the expense may already contain allocations.

Open the UK-Detailed Report to review all header and expense allocation information on the same form.
Here is an example of a UK-Detailed Report.

Employee details, report header information, expenses including GLs and cost objects, and report summaries should be reviewed carefully.
Additional sections of the UK-Detailed Report that may assist an approver are the Approval Flow and Audit Trail.

Review each individual expense on the report by clicking on the Expense Type.

The Expense tab will show on the right with details specific to the expense.
Review the details and modify the information if necessary.

NOTE: For Paid by Employee Expenses, the approver will be able to adjust down the reimbursable amount by changing the Approved Amount field.

Click Save if any changes are made.

The approver can review, add or change the allocation by clicking the Allocate button.
The Allocations for Report screen will open with the specific expense checked. The screen will only show the allocation specific to the checked expense.

The expense can be allocated by Percentage or Amount. If a change in the allocation is necessary, choose the correct allocation method for this expense and click on Add New Allocation.

The second allocation row will be added. Complete the Percentage or Amount, Cost Object Type, and Cost Object ID for the allocation. Be sure to add any statistical orders if needed.

Click Save.
A confirmation message will appear reminding the approver that a change in the allocation can affect the report’s workflow. Click Yes to continue.

A Success confirmation will appear when the allocation is saved. Click OK.

You will be returned to the Allocation for Report screen. Click Done.
Review the attached documentation for the expense by clicking on the Receipt Image tab.

The tab will show the Retrieving Images message, but the actual attachments will open in a new window.

NOTE: Be certain your internet browser is not blocking pop-up messages or boxes.

Review the attachments for correct and compete supporting documentation.

Close the attachment and continue reviewing all other expenses on the report.
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Once the entire report has been reviewed, the approver can Approve or Send Back to User.

To approve the report, click Approve.

Since an allocation on the report was changed, the approver will need to add a comment and click OK.
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The Final Confirmation box will appear and ask that the approver to review the Approver Electronic Agreement and click Accept.

An Approved Confirmation will then appear.
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<table>
<thead>
<tr>
<th>If the report needs to be returned for any reason, click Send Back to User.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearly describe to the user in the Comment box why the report is being returned and Click OK.</td>
</tr>
<tr>
<td>The Sent Back to User confirmation box will appear.</td>
</tr>
</tbody>
</table>
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You will then be back at the Reports Pending your Approval screen.

Continue reviewing and approving reports if more are pending your approval.