

Concur Systemwide Instance User Guide - Approvals

Table of Contents

| | |
|---|----------|
| APPROVALS | 2 |
| APPROVER OVERVIEW | 2 |
| <i>Types of Approvers</i> | 2 |
| <i>General Approver Responsibilities</i> | 2 |
| <i>Approval Notification and Time</i> | 2 |
| APPROVING A REQUEST (CARD SERVICES, HOSPITALITY, TRAVEL) | 3 |
| <i>Approvals Page</i> | 3 |
| <i>Review Card Services Request</i> | 4 |
| <i>Review Hospitality Justification Form Request</i> | 5 |
| <i>Review Travel Request</i> | 5 |
| <i>Approve the Request</i> | 6 |
| <i>Send Back to User</i> | 7 |
| <i>Approve & Forward</i> | 7 |
| <i>Edit Approval Flow</i> | 8 |
| APPROVING AN EXPENSE REPORT OR PROCARD STATEMENT REPORT | 10 |
| <i>Approvals Page</i> | 10 |
| <i>Review an Expense Report or ProCard Statement Report</i> | 11 |
| <i>Approve the Report</i> | 12 |
| <i>Send Back to User</i> | 13 |
| <i>Approve & Forward</i> | 13 |
| <i>Edit Approval Flow</i> | 14 |
| HELPFUL ICONS WHEN APPROVING | 16 |

APPROVALS

Approver Overview

All users of the Concur system should review and be familiar with the [CSU Travel and Business Expense Payment policy](#) and other related policies.

Types of Approvers

There are three main types of approvers within Concur:

- **Direct supervisor** – based on the employee’s HR profile data. This approver is part of the approval workflow for travel requests, card services (new card), expense reports, and ProCard statement reports.
- **Budget approver** – based on DOA360 setup at the university. This approver is part of the approval workflow for travel requests, card services (when monthly limit requested is greater than the CSU system wide policy), expense reports, and ProCard statement reports
- **Exception approver** – based on exceptions configured within Concur. Exception approvers vary depending on the scenario and are part of the approval workflow only when the exception scenario occurs (e.g., international travel requests, hospitality requests that require marketing approval for promotion items).

Note: Some universities may also require approval of hospitality justification forms within Concur.

General Approver Responsibilities

Below are general approver responsibilities within Concur. For any university-specific responsibilities, consult with the local Finance, Procurement, or Travel teams.

| Direct Supervisor | Budget / Delegation of Authority Approver |
|--|--|
| <ul style="list-style-type: none">• Review destination and related alerts (e.g., high hazard destinations, international, etc.)• Confirm/Approve business purpose of trip• Review all expenses and attachments for reasonableness, completeness and compliance• Confirm that the employee is not on vacation or leave during the requested business travel dates• Approve use of budget, if applicable• Add an additional approver if required to comply with department-specific policies and approval workflows | <ul style="list-style-type: none">• Validate chartfield (fund, dept, project, etc.)• Review expenses to confirm they align with approved budgets• Review for policy compliance• Confirm that all necessary documentation, such as agendas or other required attachments, is included and complete• Add an additional approver if required to comply with department-specific policies and approval workflows |

Approval Notification and Time

When an approver is included as part of the approval workflow, they will receive an email notification from Concur informing them of the request or report that requires their approval. Approvers are asked to approval request and reports in their queue within five days to ensure timeline reimbursement and recording of expenses within CFS.

Approving a Request (Card Services, Hospitality, Travel)

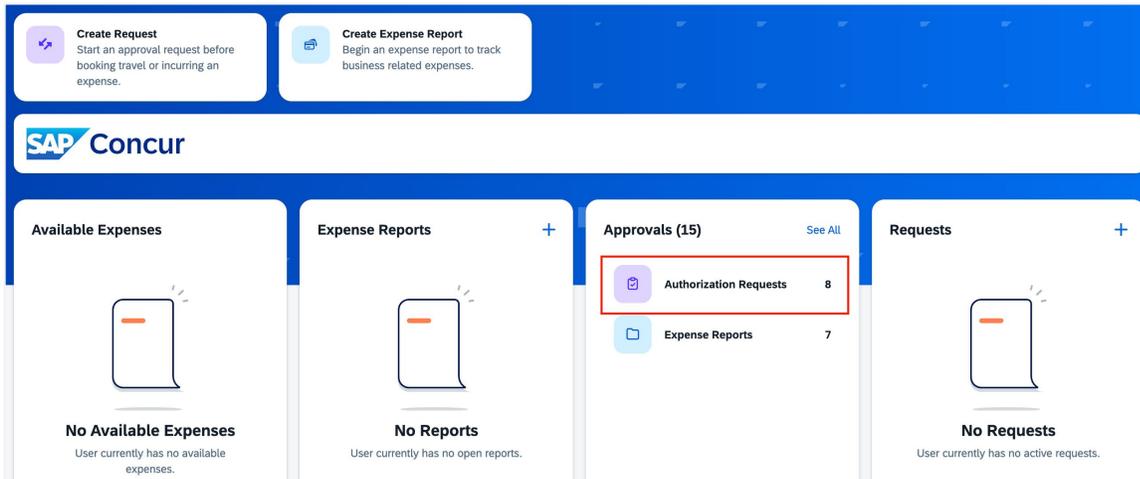
Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur. When logged into Concur, refer to the [Concur Request End User Help \(Request Approval - Overview\)](#) for additional details.

The steps to open a request for review and approval is the same regardless of the type of request. However, there may be differences in the information provided in each type of request. Review and approve, or send the request back to the employee, based on compliance with CSU system wide and local university policy.

From the approval email notification, click on the link to access Concur. Or, follow the steps below to navigate to the Approval page.

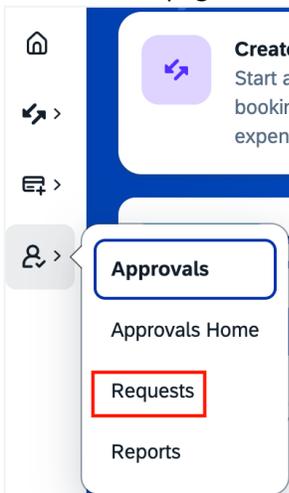
Approvals Page

1. On the home page, select **Authorization Requests** in the **Approvals** box



OR

On the home page, in the left menu, select the **Approvals** icon (👤) → **Requests**.



2. The **Requests Pending your Approval** page lists the awaiting requests. Select the request you want to open.

Home / Approvals / Requests

Requests

Limit results to: Requests Pending your Approval

Search: Enter request ID

| Comment | Name | ID | Employee | Start Date | Required Approval Date | Total |
|---------|---------------------|----------|-----------------|------------|------------------------|----------|
| | Test Card GH | ID: KLJR | User3 (PO) Test | 02/26/2026 | | \$0.00 |
| | Test Card LM | ID: KLJP | User5 (PO) Test | 02/26/2026 | | \$0.00 |
| | TEST Travel Request | ID: KKYF | User1 (PO) Test | 02/02/2026 | | \$100.00 |

Review Card Services Request

- Click on the **Request ID** to open the request header to review the card type, chartfields, and any other relevant data for the request.

Test Card GH

User3 (PO) Test | Pending Direct Supervisor Approval | Request ID: **KLJR** | 02/26/2026

Request Details | Attachments

Approve | Edit Approval Flow | Approve & Forward | Send Back to Employee

| Comment | Expense type | Details | Date | Amount | Requested |
|---------|--------------|---------|------------|--------|-----------|
| | 01. New Card | | 02/26/2026 | | |

- Click **Cancel** or **Save** to return to the **Expected Expenses** page.

Edit Request Header

Test Card GH | Request ID: KLJR

Required field *

Request Type: Credit Card Service Request | Request Name: Test Card GH

Today's Date: 02/26/2026 | Type of Card: ProCard

Business Unit: (POCMP) Cal Poly Pomona | Fund: (POM01) OPERATING FUND | Department: (68000) AVP Financial Services

Employee last name: User3 (PO) Test

Comment: 0/500

Cancel | Save

- On the **Expected Expenses** page, click the line item to view the details (e.g., 01. New Card).
- Review the information entered by the user.
 - For new cards, review the limits requested, whether card training has been completed, and the justification for the card.

Note: if the card training has not been completed, the university card admin will wait until it is completed before issuing the new card.

← → **01. New Card \$0.00** Save Cancel

02/26/2026

Quick Tips Show Less
Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more
Declining Balance Cards will be determined based on business justification

Allocate

Required field *

Requested Date * 02/26/2026 Requested Single Transaction Limit * 5,000 Requested Monthly Limit * 10,000

Employee First Name * User3 (PO) Employee Middle Name/Initial Employee Last Name * Test

Campus Phone Number * 555-555-5555 Card Training Completed Mobile Phone Number

Provide Justification for New Card 0/2000

7. Click **Cancel** or **Save** to return to the **Expected Expenses** page to review any additional line items.

Review Hospitality Justification Form Request

Approval of hospitality justification form requests is only applicable for universities that require it. Otherwise, the hospitality justification form is auto approved when no exceptions are present. Follow the steps in the [Approvals Page](#) section above to locate and open the hospitality justification form request.

1. Click on the **Request ID** to view the request header.
2. Click **Cancel** or **Save** to return to the **Expected Expenses** page.
3. On the **Expected Expenses** page, click the line item to view details of the hospitality expense.
4. Click **Cancel** or **Save** to return to the **Expected Expenses** page to review any additional line items.

Review Travel Request

Follow the steps in the [Approvals Page](#) section above to locate and open the travel request.

1. Click on the **Request ID** to view the request header.

Alerts: 3

TEST Employee Travel with CA \$600.00 Approve Edit Approval Flow Approve & Forward Send Back to Employee

User5 (S.J) Test | Pending Direct Supervisor Approval | Request ID: **KLN4** | 01/21/2026 - 01/23/2026

Request Details Print/Share Attachments

CASH ADVANCES: 1
Amount \$600.00

EXPECTED EXPENSES Add Edit Delete Allocate

| Expense type | Details | Date | Amount | Requested |
|-------------------------------------|---|------------|----------|-----------------|
| <input type="checkbox"/> Air Ticket | San Francisco (SFO) - Dallas (DAL) : Round Trip | 01/21/2026 | \$600.00 | \$600.00 |
| | | | | \$600.00 |

2. Review the **Request Header**. Things to consider:
 - a. Review destination and see if high hazard destinations are noted.
 - b. Take note of any personal days and consider that estimated costs are prorated accordingly (i.e. daily meal allowances, incidentals, etc.).

Edit Request Header
TEST Employee Travel with CA | Request ID: KLN4

Required field *

Request Type: Employee Request - Travel
Request/Trip Name *: TEST Employee Travel with CA
Trip Type *: 2-Out-of-State

Travel Start Date *: 01/21/2026
Travel End Date *: 01/23/2026

Traveler Type *: 2-Staff
Trip Purpose *: Meeting
If Faculty, is class covered?:

Personal Dates of Travel-If none enter NA *: NA
Destination City/State *: Dallas, Texas
Final Destination Country: UNITED STATES (US)

Business Unit *: (SJ000) San Jose State University
Fund *: (70000) CSU Operating Fund
Department *: (1174) Accounting Services

Project: (33100-001) 33100-001 - GENERAL ADMINIS...
Program:
Class:

Employee last name *: User5 (S.J) Test

Cancel Save

3. Click **Cancel** or **Save** to return to the **Expected Expenses** page.
4. On the **Expected Expenses** page, review any **Alerts** at the top of the screen. Click the line item to view details of the expected expense.
 - a. Review all expenses for reasonableness, completeness and compliance.

Alerts: 3

REQUEST

Warning: REVIEW REQUIRED: CSU Policy requires pre-approval for all trips. Please review business justification provided explaining why approval was not obtained in advance. [View](#)

Warning: POLICY REMINDER: Your Cash Advance will be issued within 30 days of your Business Trip Start Date. [View](#)

Warning: This Request includes a Cash Advance. By approving the Request you are also approving the Cash Advance. [View](#)

TEST Employee Travel with CA \$600.00 Approve Edit Approval Flow Approve & Forward Send Back to Employee

User5 (S.J) Test | Pending Direct Supervisor Approval | Request ID: KLN4 | 01/21/2026 - 01/23/2026

[Request Details](#) [Print/Share](#) [Attachments](#)

CASH ADVANCES: 1
Amount
\$600.00

EXPECTED EXPENSES Add Edit Delete Allocate

| <input type="checkbox"/> | Expense type | Details | Date | Amount | Requested |
|--------------------------|--------------|---|------------|----------|-----------------|
| <input type="checkbox"/> | Air Ticket | San Francisco (SFO) - Dallas (DAL) : Round Trip | 01/21/2026 | \$600.00 | \$600.00 |
| | | | | | \$600.00 |

Approve the Request

1. Once all line items of the Cash request have been reviewed, click **Approve**.

TEST Employee Travel with CA \$600.00 Approve Edit Approval Flow Approve & Forward Send Back to Employee

User5 (S.J) Test | Pending Direct Supervisor Approval | Request ID: KLN4 | 01/21/2026 - 01/23/2026

[Request Details](#) [Print/Share](#) [Attachments](#)

2. Once the request has been approved, notification regarding the status of the request will be sent to the user (and delegate if opted into notifications) and the status will be noted on the user's **Manage Requests** page.

Send Back to User

During your review, you may choose to return the request to the user for correction.

1. Click **Send Back to Employee**.



2. In the **Send Back to Employee** window, enter the **Reason for Sending Back the Request** and click **Send Back**.

The screenshot shows the "Send Back to Employee" dialog box. It has a title bar "Send Back to Employee". Below the title bar is a "Comment History" section with a table:

| Date/Time↓↑ | Entered By↓↑ | Comment↓↑ |
|-------------|------------------|--------------------------------|
| 02/27/2026 | User5 (S.J) Test | Past date for testing purposes |

Below the table is an "Add Comment" section with the label "Reason for Sending Back the Request*" and a text input field containing the text "Add in your expected hotel expense". At the bottom right of the dialog are "Cancel" and "Send Back" buttons, with the "Send Back" button highlighted by a red box.

3. The user will receive a notification via email that their request has been sent back with the comment.

Approve & Forward

During your review, you may choose to add an additional approver after your approval.

1. Click **Approve & Forward**.



2. The **New Approver** step appears after the current approval step. Enter the **Approver Name** and click **Approve & Forward**.

Note: Any added approvers must also be designated as an approver within Concur or they will not show up in the **Approver Name** list.

Edit Approval Flow

Another option to add an approver is through the **Edit Approval Flow**. This allows the approver to add an additional approver(s) before or after the remaining approval steps.

1. Click **Edit Approval Flow**.

2. In the **Edit Approval Flow** window, select the **three dots** next to the approval step to add an approver above or below that step.

3. The **New Approver** step appears. Enter the **Approver Name** and click **Save**.

Edit Approval Flow

Direct Supervisor Approval 1 ...

Direct Supervisor (SJ) Test

Financial/DOA Approval ...

New Approver ...

Approver Name *

Search by Last Name

Request Processor Review ...

Save Cancel

4. Click **Approve**. The request then routes based on the edited approval flow.

TEST Employee Travel with CA \$600.00

User5 (SJ) Test | Pending Direct Supervisor Approval | Request ID: [KLN4](#) | 01/21/2026 - 01/23/2026

[Request Details](#) | [Print/Share](#) | [Attachments](#)

Approve | [Edit Approval Flow](#) | [Approve & Forward](#) | [Send Back to Employee](#)

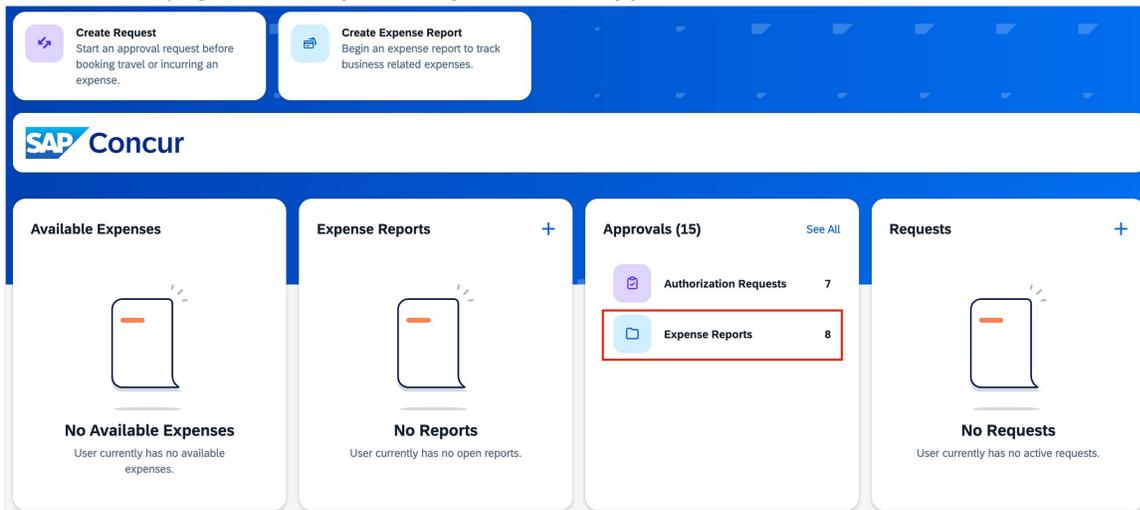
Approving an Expense Report or ProCard Statement Report

The steps to review and approve an expense report or a ProCard statement report are the same. However, there may be differences in the types of expenses submitted on each report so review each line item thoroughly. When logged into Concur, refer to the [Concur Expense End User Help \(Expense Report Approval - Overview\)](#) for additional details.

The expense report or ProCard statement report is reviewed by the direct supervisor and the cost object approver (delegated authority for the chartfield) but it is a shared responsibility to ensure the expenditures are in compliance and follow university guidelines.

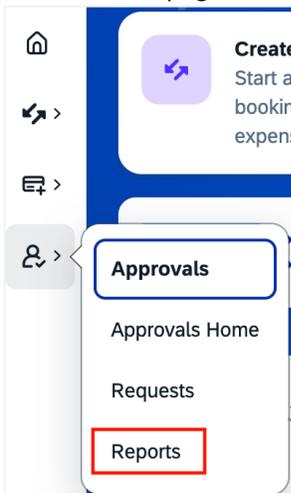
Approvals Page

1. On the home page, select **Expense Reports** in the **Approvals** box



OR

On the home page, in the left menu, select the **Approvals** icon (👤) → **Reports**.



2. The **Reports Pending your Approval** page lists the awaiting reports. The **Report Type = Expense Type** for expense reports or **Statement** for ProCard reports. Select the report you want to open.

Report List

Reports Pending your Approval (8)

View

Report Name Begins With Go

| Report Type | Employee Name | Report Name | Comments | Report Date | Date Submitted | Total | Amount Due E... | Requested Am... |
|---|------------------|------------------------------|--|-------------|----------------|------------|-----------------|-----------------|
| Expense Type | User5 (S.J) Test | TEST New Hospitality Form | Test Hospitality Outreach Event | 02/28/2026 | 02/27/2026 | \$615.00 | \$615.00 | \$615.00 |
| Expense Type | User9 (S.J) Test | TEST Employee Travel with CA | Past date for testing purposes | 02/27/2026 | 02/27/2026 | \$742.33 | \$-666.16 | \$76.17 |
| ACTION REQUIRED: There is an amount due to the University. Please visit the Bursar's/Cashier's Office and pay the amount due (Amount Owed Company in Report Details > Report Totals) and attach proof of payment to the report header. This report has one or more entry level exceptions. | | | | | | | | |
| Expense Type | User9 (S.J) Test | TEST Employee Travel - Int | Past date for testing purposes | 02/27/2026 | 02/27/2026 | \$1,274.68 | \$781.01 | \$1,236.60 |
| Expense Type | User9 (S.J) Test | TEST Local Travel-Jan | | 02/26/2026 | 02/27/2026 | \$613.23 | \$613.23 | \$613.23 |
| This report has one or more entry level exceptions. | | | | | | | | |
| Expense Type | User9 (S.J) Test | TEST Non-Employee Report | Past date for testing purposes | 02/26/2026 | 02/27/2026 | \$400.00 | \$400.00 | \$400.00 |
| No approvers were found for cost object Contracts (S.J-S.J000-65184-1005). | | | | | | | | |
| Expense Type | User9 (S.J) Test | TEST New Hospitality Form | Test Hospitality Outreach Event | 02/26/2026 | 02/27/2026 | \$815.00 | \$815.00 | \$815.00 |
| This report has one or more entry level exceptions. | | | | | | | | |
| Statement | User6 (S.J) Test | ProCard 12/22 - 01/21 6495 | updating all the report line items this time | 12/22/2025 | 02/27/2026 | \$1,848.26 | \$-56.37 | \$1,791.89 |
| REVIEW REQUIRED: This report contains Hospitality expenses that include recreational, sporting, or entertainment events OR have Spouse/Companion attendees. This report has one or more entry level exceptions. | | | | | | | | |
| Statement | User7 (S.J) Test | ProCard 12/22 - 01/21 1062 | | 12/22/2025 | 02/25/2026 | \$1,848.26 | \$-117.38 | \$1,730.88 |
| REVIEW REQUIRED: This report contains Hospitality expenses that include recreational, sporting, or entertainment events OR have Spouse/Companion attendees. This report has one or more entry level exceptions. | | | | | | | | |

Review an Expense Report or ProCard Statement Report

- On the **Expense Summary** page, review any **Exception** messages at the top, any linked **Requests** or **Cash Advances** in the Summary tab.

TEST Employee Travel with CA [User9 (S.J) Test]

Send Back to User Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

| Expense Type | Date | Amount | Exception |
|------------------|------------|---------|--|
| N/A | | | ACTION REQUIRED: There is an amount due to the University. Please visit the Bursar's/Cashier's Office and pay the amount due (Amount Owed Company in Report Details > Report Totals) and attach proof of payment to the report header. |
| Personal/Non ... | 02/05/2026 | \$66.16 | This report contains expense(s) outside of the trip dates, please review for accuracy. |

Expenses

| Expense Type | Vendor | Custom 11 - L... | Custom 12 - F... |
|--------------------|---------------|------------------|------------------|
| Airfare | 1Time Airline | | |
| Personal/Non ... | HCM*TRANSW... | | |
| Agenda/Itinerar... | | | |
| Cash Advance ... | | | |

Report Summary

| Report Totals | Amount Due Company | Amount Due Company Card | Amount Due Employee |
|---------------|--------------------|-------------------------|---------------------|
| | \$666.16 | \$142.33 | \$-66.16 |

Requests (1)

| Request Name | Request ID | Amount Approved | Amount Remaining |
|------------------------------|------------|-----------------|------------------|
| TEST Employee Travel with CA | KLD3 | \$600.00 | \$600.00 |

Cash Advances (1)

| Cash Advance Name | Request Date | Amount Requested | Starting Balance | Available Balance |
|------------------------------|--------------|------------------|------------------|-------------------|
| TEST Employee Travel with CA | 02/8/2026 | \$600.00 | \$600.00 | \$0.00 |

- Click on **Details** → **Report Header** to open the report header.

TEST Employee Travel with CA [User9 (S.J) Test]

Send Back to User Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Report Header

Exceptions

| Expense Type | Date | Amount | Exception |
|------------------|------------|---------|--|
| N/A | | | ACTION REQUIRED: There is an amount due to the University. Please visit the Bursar's/Cashier's Office and pay the amount due (Amount Owed Company in Report Details > Report Totals) and attach proof of payment to the report header. |
| Personal/Non ... | 02/05/2026 | \$66.16 | This report contains expense(s) outside of the trip dates, please review for accuracy. |

Expenses

| Expense Type | Vendor | Custom 11 - L... | Custom 12 - F... |
|--------------------|---------------|------------------|------------------|
| Airfare | 1Time Airline | | |
| Personal/Non ... | HCM*TRANSW... | | |
| Agenda/Itinerar... | | | |
| Cash Advance ... | | | |

Report Summary

| Report Totals | Amount Due Company | Amount Due Company Card | Amount Due Employee |
|---------------|--------------------|-------------------------|---------------------|
| | \$666.16 | \$142.33 | \$-66.16 |

Requests (1)

| Request Name | Request ID | Amount Approved | Amount Remaining |
|------------------------------|------------|-----------------|------------------|
| TEST Employee Travel with CA | KLD3 | \$600.00 | \$600.00 |

Cash Advances (1)

| Cash Advance Name | Request Date | Amount Requested | Starting Balance | Available Balance |
|------------------------------|--------------|------------------|------------------|-------------------|
| TEST Employee Travel with CA | 02/26/2026 | \$600.00 | \$600.00 | \$0.00 |

TOTAL AMOUNT \$742.33 TOTAL REQUESTED \$76.17

- Review the **Report Header**. Items to review will vary based on the type of report.

Note: The chartfield on the header is the default for each transaction in the report unless the transaction has been allocated.

Additional details to review for travel expense reports:

- Any personal days on the request and whether expenses were claimed on those dates.
- Any linked Travel Request or Hospitality Justification Form, if applicable.

Report header for: TEST Employee Travel with CA

Previous Comment
Entered By User9 (SJ) Test : Past date for testing purposes

| | | | |
|--|---|--|--|
| Report Type Employee Expense - Travel | Report Id 7E99D6CAF18C4C73829E | Report Key 168122 | Report/Trip Name TEST Employee Travel with CA |
| Trip Type 2-Out-of-State | Travel Start Date 01/21/2026 | Travel End Date 01/23/2026 | Traveler Type 2-Staff |
| Trip Purpose Meeting | Personal Dates of Travel-If none enter NA NA | Business Unit (SJ000) San Jose State Univer | Fund (65184) Kay Armstead Center |
| Department (1005) Contracts | Project | Program | Class |

Comments To/From Approvers/Processors

User Name
User9 (SJ) Test

| Request Name | Request ID | Cancelled | Request Total | Amount Approved | Amount Remaining |
|--------------------------|------------|-----------|---------------|-----------------|------------------|
| TEST Employee Travel ... | KLD3 | No | \$600.00 | \$600.00 | \$600.00 |

Save Cancel

- Click **Cancel** or **Save** to return to the **Expense Summary** page.
- Select each line item to review the **Summary** data in the right panel. The [general approver responsibilities](#) section provides guidance for review.

TEST Employee Travel with CA [User9 (SJ) Test]

Send Back to User Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

| Expense Type | Date | Amount | Exception |
|------------------|------------|---------|--|
| N/A | | | ACTION REQUIRED: There is an amount due to the University. Please visit the Bursar's/Cashier's Office and pay the amount due (Amount Owed Company in Report Details > Report Totals) and attach proof of payment to the report header. |
| Personal/Non ... | 02/05/2026 | \$66.16 | This report contains expense(s) outside of the trip dates, please review for accuracy. |

Expenses

| Expense Type | Vendor | Custom 11 - L... | Custom 12 - F... |
|--------------------|---------------|------------------|------------------|
| Airfare | 1Time Airline | | |
| Personal/Non ... | HCM*TRANSW... | | |
| Agenda/Itinerar... | | | |
| Cash Advance ... | | | |

TOTAL AMOUNT \$742.33 TOTAL REQUESTED \$76.17

Expense Receipt Image Summary

| | | | |
|-------------------------|--------------------------------|-----------------------------|-------------------------------------|
| Expense Type Airfare | Transaction Date 02/08/2026 | Ticket Number | Airfare Class of Service Economy |
| Vendor | City of Purchase | Payment Type Travel Card | Amount 76.17 USD |
| 1Time Airline | | Reviewed | Approved Amount 76.17 |

Comments To/From Approvers/Processors Last Name First Name Email Address

Request ID Purpose and Travel Dates Request

Save Allocate Attach Receipt

Approve the Report

- Once all line items of the report have been reviewed, click **Approve**.

TEST Employee Travel with CA [User9 (SJ) Test]

Send Back to User Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

- Once the report has been approved, notification regarding the status of the report will be sent

to the user (and delegate if opted into notifications) and the status will be noted on the user's **Manage Reports** page.

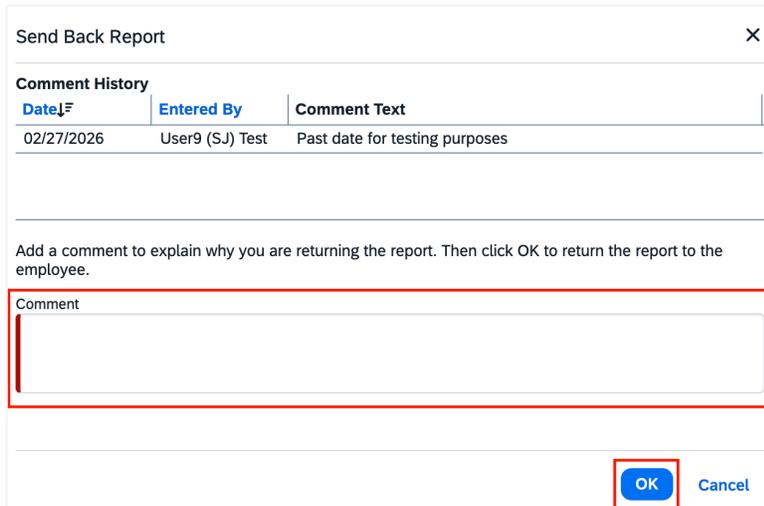
Send Back to User

During your review, you may choose to return the report to the user for correction.

1. Click **Send Back to User**.



2. In the **Send Back Report** window, enter a **Comment** regarding why the report is being sent back and click **OK**.



The "Send Back Report" dialog box has a close button (X) in the top right. It contains a "Comment History" section with a table:

| Date | Entered By | Comment Text |
|------------|------------------|--------------------------------|
| 02/27/2026 | User9 (S.J) Test | Past date for testing purposes |

Below the table, there is a text area with the instruction: "Add a comment to explain why you are returning the report. Then click OK to return the report to the employee." Below this is a "Comment" input field (highlighted with a red box) and "OK" and "Cancel" buttons at the bottom right (the "OK" button is also highlighted with a red box).

3. The user will receive a notification via email that their report has been sent back with the comment.

Approve & Forward

During your review, you may choose to add an additional approver after your approval.

Note: Not all approvers will have this button available. If an additional approver is needed on the report, refer to the **Edit Approval Flow** step below.

1. Click **Approve & Forward**.



2. In the **Approve & Forward** window, enter the **User-Added Approver**, a **Comment** to inform the added approver why they are receiving the report, and then click **Approve & Forward**.

Note: Any added approvers must also be designated as an approver within Concur or they will not show up in the **Approver** list.

Approve & Forward Report: TEST Employee Travel with CA ×

User-Added Approver:

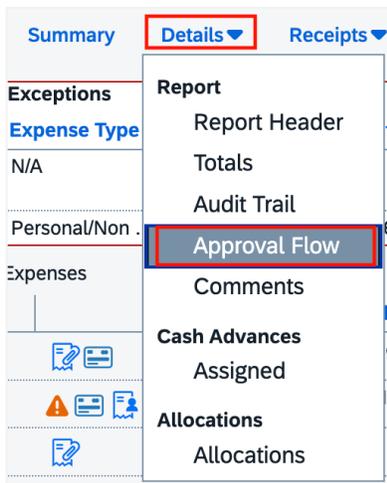
Comment :

Approve & Forward
Cancel

Edit Approval Flow

Another option to add an approver is through the **Approval Flow** window. This allows the approver to add an additional approver(s) before or after the remaining approval steps.

1. Click on **Details** → **Approval Flow**.



2. In the **Approval Flow for Report** window, select the **plus sign** next to the approval step to add an approver above or below that step.

Approval Flow for Report: TEST Employee Travel with CA

→ Direct Supervisor 1 Approval:

Financia/DOA Approval:
 +

(this step may be skipped)

Expense Processor Review:
 + +

(this step may be skipped)

Approve Send Back

Save Workflow Cancel

3. The **New Approver** step appears. Enter the **User-Added Approver Name** and click **Save Workflow** (or click **Approve** from this window and the report routes based on the edited approval flow).

Approval Flow for Report: TEST Employee Travel with CA

→ Direct Supervisor 1 Approval:

User-Added Approver:
 + X

Financia/DOA Approval:
 +

(this step may be skipped)

Expense Processor Review:
 + +

Approve Send Back

Save Workflow Cancel

4. Click **Approve**. The report routes based on the edited approval flow.

TEST Employee Travel with CA [User9 (SJ) Test]

Send Back to User Approve Approve & Forward

[Summary](#) [Details](#) [Receipts](#) [Print / Email](#) [Hide Exceptions](#)

Helpful Icons When Approving

When reviewing Requests, Expense Reports, and ProCard Statement Reports, Concur icons will be displayed on line items to provide the approver with a quick visual on important details that are included. The table below includes examples of the more common icons and their description. When logged into Concur, refer to the [Concur End User Help \(search for icons\)](#) for a full list.

| Icon | Name | Description |
|---|------------------|--|
|  | Warning | An exception warning has been triggered. Review for details. |
|  | Attachment | Attachment included. Review for details. |
|  | Credit Card | Expense entry is from a CSU provided credit card. |
|  | Comment | Comment included. Review for details. |
|  | Attendees | Attendees included. Review for details. |
|  | Personal Expense | Expense entry is for a CSU credit card transaction that has been marked as personal. Review of details. The cardholder is responsible for reimbursing CSU. |
|  | Allocation | Expense entry has been allocated to a chartfield other than (or in addition to) the default chartfield indicated at the header level. |
|  | Missing Receipt | Expense entry required a receipt but the original receipt was not available. The missing receipt affidavit was used. |