



CONCUR QUICK GUIDE: APPROVALS

GETTING STARTED

Use your regular campus credentials to log in under the Staff and Faculty tab of the CSUB homepage.

APPROVERS HAVE A DEADLINE IN WHICH TO APPROVE TRANSACTIONS

- Request: **10 days** (including weekends & holidays)
- Expense: **10 days** (including weekends & holidays)

(these are extended during the December holiday period)

IF TRANSACTIONS AREN'T APPROVED BY THE DEADLINE

- If the "Reports To" manager hasn't approved it, the transaction will route to **their** "Reports To" manager, and so on until someone approves it.
- If the "Cost Object/Budget Approvers" doesn't approve it, **the transaction will be automatically approved.** Only one Cost Object/Budget Approver is loaded into Concur.
- If an Administrator wants someone to review transactions before they approve them, they need to add the employee as a Delegate" and check the box "can preview for approver". (They can't authorize them to approve the transactions unless the employee is already listed as an approver in Concur.)
 - See page 12 in the Concur User Guide, found on the Payment Services' Concur web page:
 - <https://www.csub.edu/bas/paymentservices/Concur/index.html>

ACCESSING TRAVEL REQUESTS AND EXPENSE REPORTS PENDING APPROVAL

From the Concur Homepage, click one of the following:

- **Approvals** link on the **Quick Task Bar**.
- **Required Approvals** link to the left of The California State University welcome message.
- **Required Approvals** link found under **My Tasks**.

APPROVAL OPTIONS – "REPORTS TO" MANAGER

1. **Approve a submitted Travel Request**
 - a. Click the name of the report you want to open.
 - b. Review each estimated expense to ensure they're reasonable, necessary to conduct official University business, and charged to the correct chartfield(s).
 - c. Ensure that all large expenses associated with the trip are included (airfare, car rental, hotel, meals) to ensure the total cost of the Request is a reasonable approximation of what the Travel Expense Claim will be later.
 - i. Click **Details, Allocations** to view chartfield allocations for the entire report.
 - d. If you agree with the Travel Request, click **Approve**.
 - e. If another approver needs to be added, next to the line with your name, click the plus sign + to add them. Type in their last name and choose their name when it's displayed. Click **Approve and Forward**.
 - f. If you **don't** approve the Travel Request, you can **Reject** it and send it back to the Requestor. Add a note to tell them why it's being rejected.



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2. **Approve a submitted Expense Report**

- a. Click the name of the report you want to open.
- b. Review each line for compliance and to ensure required receipts and itemizations have been provided.
 - i. Click the icons associated with expenses to display attached receipt images, account allocations, comments, missing receipt affidavits, etc.
 - ii. Click the > symbol to expand the expense entry to display itemization details.
 - iii. Click **Details, Allocations** to view chartfield allocations for the entire report.
- c. After reviewing all items, if you agree that the expenses are reasonable, necessary to conduct official University business, and charged to the correct chartfield(s), click **Approve**.
- d. If another approver needs to be added, next to the line with your name, click the plus sign + to add them. Type in their last name and choose their name when it's displayed. Click **Approve and Forward**.

3. **Send an Expense Report Back to the Employee-** Approvers cannot modify expense reports. If the report requires correction, send it back to the employee.

- a. Click the name of the report you want to open.
- b. Click **Send Back to Employee**.
- c. Use the **Comment** field in the **Send Back Report** window to explain the reason the report is being returned to the employee, then click **OK**.

COST OBJECT APPROVER

- When entering an expense report, the Concur system allows travelers to charge to one or multiple chartfield designations (split by amount or %).
- If expenses are shared between a home department and an outside department, upon submission, the expense report will simultaneously forward to the appropriate approving authorities for each chartfield designation.
- Each approver can take individual action on the expense report, but the report will not forward to Payment Processing for final review until it has been approved by all necessary approvers.
- **If an approver is both the employee's "Reports To" Manager and the Cost Object Approver, they will only need to approve the transaction once.**

VIEW APPROVED REPORTS

- You may go back to review any reports you have already approved.
- From the **Expense** tab, click **Approve Reports**.
- On the left side of the screen change your View to filter for the reports you want to review.

QUESTIONS? CONTACT PAYMENT SERVICES:

*Preferred method: email accounts_payable@csu.edu & enter "Concur" in the subject line. Include screenshots if possible.

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