



Reviewing and Approving a Transaction

Purpose: This section is for individuals who are responsible for approving requests or reports submitted by users.

The screenshot shows the Concur Home page interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Approvals (highlighted with a red box), Reporting, and App Center. Below the navigation bar is a header area with the user's name 'Hello, Daniel' and a 'New' button. To the right of the header is a quick task bar with several metrics: 05 Required Approvals (highlighted with a red box), 81 Authorization Requests, 01 Available Expenses, 11 Open Reports, and 00 Cash Advances. Below the header is a main content area with several sections: TRIP SEARCH, ALERTS, COMPANY NOTES, and MY TASKS. The MY TASKS section contains three cards: '05 Required Approvals' (highlighted with a red box), '01 Available Expenses', and '11 Open Reports'. The '05 Required Approvals' card lists several transactions with details like 'Justin K. | test inactive | \$100.00 — Travel'.

Expense reports pending approval can be accessed from multiple links on the Concur Home page.

- **Approvals** link on the Quick Task Bar
- **Required Approvals** link next to the FSU-Concur welcome message
- **Required Approvals** link found under My Tasks



In State +<\$1000 Workflow Test [Villarreal, Oriana]

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
Book/Media Pur...	06/17/2016	\$425.00	Note: This entry has a comment. Please review.
Book/Media Pur...	06/17/2016	\$425.00	This report contains expense(s) outside of the trip dates, please review for accuracy.

Expenses

Date	Expense Type	Amount	Approved
09/19/2017	Daily Meal Allowance Key West, Florida	\$36.00	\$36.00
09/18/2017	Daily Meal Allowance Key West, Florida	\$36.00	\$36.00
09/18/2017	Airfare Air Oshnee	\$100.00	\$100.00
09/18/2017	Airline Fees	\$50.00	\$50.00
09/18/2017	Documented Miles	\$15.57	\$15.57
09/18/2017	Exam Certification/License Fee Visa	\$40.00	\$40.00
09/17/2017	Daily Meal Allowance Key West, Florida	\$36.00	\$36.00
06/17/2016	Book/Media Purchase ACTE, Alexandria, Virginia	\$425.00	\$300.00

Report Summary

Amount Due Company	Amount Due Company Card	Amount Due Employee
\$0.00	\$425.00	\$188.57

Requests (1)

Request Name	Request ID	Amount Approved	Amount Remaining
In State +<\$1000 Workflow Test	5429	\$621.00	\$455.43

Approve submitted transactions

1. Click the name of the request or report you want to open.
2. Review each line item for compliance, and to ensure any required receipts and itemizations have been provided. Approvers can change allocations only. They cannot add or delete lines or change amounts.
 - a. Click the icons associated with the expenses to display attached receipt images, account allocations, comments, missing receipt affidavits, and exceptions.
 - b. Click the > symbol to expand the expense entry to display itemization details.
3. Click Details, Allocations to view account allocations for the entire report.
4. If all items are in compliance, click Approve.
5. If allocations are changed, upon clicking Approve, workflow will adjust to send the report to the newly-added Cost Object Approver (Budget Manager).

Send a Transaction Back to the Preparer

To return the entire expense report to the preparer for correction:

1. Click Send Back to User
2. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.



Adding an Additional Review Step

Approvers have the option to forward transactions in their queue to additional approvers.

The screenshot shows a web application window titled "Approve & Forward Report: Seattle Conference". Inside the window, there is a section labeled "User-Added Approver:" with a text input field. Below the text field is a dropdown menu that is currently open, displaying a list of search criteria: "Last Name", "First Name", "Email Address", "Login ID", and "Employee ID". At the bottom of the window, there are two buttons: "Approve & Forward" and "Cancel".

To approve and forward a request or report:

1. Select the report you want to open.
2. Review the report, and then click Approve & Forward.
3. In the User-Added Approver field, click the dropdown and select Last Name or Email Address for the search method.
4. Search for, then select the appropriate individual.
5. Add a Comment.
6. Click Approve & Forward

If you received the approval as the Cost Object Approver (Budget Manager), to forward to another approver:

1. Click **Details**, and then **Approval Flow**.
2. Click the "+" icon to add an approver to the workflow and click **Approve**.