Reviewing and Approving a Transaction

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

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
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.

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.