Concur Travel & Expense
Approver Role

San Francisco State University
Administration & Finance
• Approver Role Overview
• Accessing Approvals
• Approver Responsibilities
• Delegate Permissions
• Approving Travel Requests
• Approving Expense Reports
• Expense Report Approval Workflow
You will have the Approver Permission in Concur if:
   a.) you are an employee’s direct report in HR
   b.) you are a Budget Approver in Concur

• Having the Approver Role allows you to approve Travel Requests and Expense Reports as well as Reporting access in Concur.
• You will have one login for both your own travel and approvals.
• Concur will alert you via email notification when there are Travel Requests/Expense Reports pending your approval.
• You have 6 calendar days to approve a Travel Request and 10 calendar days to approve an Expense Report. Not approving during this timeframe may result in the Travel Request/Expense Report being routed to another manager for approval.
Accessing Approvals

- **Email Notifications:** [AutoNotifications@concursolutions.com](mailto:AutoNotifications@concursolutions.com)

- Notification will state you have either a Request or a Report pending your approval.

- Click on **View Report** and it will take you to the CSU Single Sign-on page to enter your SF State Credentials.
  - If it is a Travel Request, you will have a **Link to Approve Request** link provided.
Accessing Approvals

On the Quick Task Bar, click **Required Approvals**.
- The number of approvals will be indicated.

**OR**

Click on the **Approvals** Tab.

Then, click **Travel Requests** or **Expense Report Tabs** to view what’s pending approval.
The approving authority ensures all expenses are reasonable in terms of price, purpose, and necessity, and is responsible for:

- Ensuring expenses charged to department accounts are supported by sufficient funds and ensuring appropriateness of use of funds.
- Ensuring expenses requested are ordinary, reasonable, not extravagant, necessary, and supported by a business purpose or justification, as appropriate.
- Validating, to the extent possible, that the expenses listed were actually incurred by the employee and that appropriate supporting documentation if applicable is attached.
- Reviewing and approving the business purpose and ensuring the request is in compliance with any applicable sponsored project/grant requirements if applicable.
- Approving/denying payment of the travel claim in a timely manner.
- Denying expenses not directly related to official University business.
Delegate Permissions

**Delegate** - employee who is allowed to perform work on behalf of another employee. Delegate Permissions are only for Request and Expense. You will also need to add this delegate as an Assistant/Travel Arranger to allow them to book travel via Concur.

**Traveler Permissions:**
- Prepare Travel Requests and Expenses Reports
- View Receipt Images
- Receive a copy of Email Notifications (No approval emails)

**Approver Permissions:** Approvers will have additional approval permissions to assign to a delegate.
- Delegating an Approver (can approve/approve temporarily)
  - Employee must be same level or higher as you (if “Reports to” Approver)
  - Employee must already be an Approver in Concur
- Preview Travel Request/Expense Report for Approver prior to Approval
- Receive a copy of Approval Email Notifications
Review each of the Request Tabs:

- Request Header
- Segments
- Expense Summary
- Approval Flow
- Audit Trail
Review the Travel Request Header information and any documents attached, if applicable.

What to look for in the Travel Request Header:

- Trip Purpose corresponds with the destination
- Start and End Dates of trip
- Personal Travel (if applicable) this is a free form date field. The system cannot identify what portion of request is personal travel vs. business so this is a manual process.
- Appropriate Chartfield entered.
- Any Comments (optional) entered if any. Approvers can add comments as well.
- If a Travel advance is requested, make sure a justification for advance is entered in the comments box.
- Check for any attachments under Attachments > View Attachments from the Request Header.
The Expense Summary will give a snapshot of the estimated expenses listed. Additional estimated expenses listed could be:

- Please note: not all Expense Types are available in the request module. In this case, traveler may list an estimated amount under **Other Expense** and then claim the actual expenses on their Expense Report to have the requested amount closer to the actual expenses.

- When traveler expenses meals, meals will calculate $55 (max cap for domestic meals) x’s the # of business days the traveler enters. They will claim the actual amount spent on the expense report.

- Concur will not stop a user from entering a different amount in their Expense Report than what estimated on their Travel Request. If the amount exceeds what was included in the request or seems unreasonable, the approver can choose not to approve the Expense Report and return it to the user for correction.
• Once you click on the Expense Report awaiting your approval, you will see a list of expenses in the Summary.

• You can click on each expense to see the itemization (if applicable) and all the fields entered on the Expense Report.
Please review each expense and all fields (example on next slide)

- Click on Receipt Image to view the receipt/document.
- **Approved Amount** is the estimated amount on the approved Travel Request.
- **Request Summary** - gives you a breakdown of the approved Request estimated expenses vs. the actual expenses.
- **Amount Remaining**: Only the expense types that were included on the Travel Request will show.
  - Positive amount: traveler expensed less than approved request estimate
  - Negative amount: traveler expensed more than approved request estimate
  - $0 amount: traveler expensed exact amount
- Any warnings will show at the top and indicate the warning reason. This will include any personal travel dates that the traveler indicated or any exception to the policy such as hotel expense is over $275 max limit where an approved One-Time Exception form should be attached along with the receipt.
Approving Expense Reports

San Francisco State
Administration & Finance

13
As an approver, you have the ability to:

- Modify Chartfield information (If you are not the budget approver for the correct chartfield, please send back to traveler to update).
- Add a Comment
- Add an Attachment

Any other modifications to the request/expense report needs to be completed by the traveler/traveler’s delegate. In order for this to happen, the request/expense report needs to be sent back.
Review the **Approval Flow** Tab to make sure all necessary approvals are in place depending on the type of travel and destination.

- The Budget Approver Name will not populate until the Reports to Approver has approved.

The **Audit Trail** Tab will show a record of all actions and descriptions within the approval workflow conducted by the traveler, delegate, or approver for that particular Travel Request/Expense Report.

- Anytime the Travel Request/Expense Report gets modified, approved, sent back, comment added, chartfield edited, will be listed in the **Audit Trail**.
- Each Travel Request and Expense Report will have their own **Approval Flow** and **Audit Trail**.
- All users who has access to the Travel Request/Expense Report will be able to view these tabs.
Approval Workflow

Concur Approval Workflows

Travel Request = In-State/Out-of-State

- Travel Request Submitted
- "Reports To" Approver
- Budget Approver
- Travel Request Approved

Travel Request = International

- Travel Request Submitted with Foreign Travel Insurance Form attached
- "Report to" Approver
- Budget Approver
- Exception Approver (Provost)
- Travel Request Approved

Expense Report = In-State/Out-of-State/International

- Expense Report Submitted
- "Report to" Approver
- Budget Approver
- AP Travel Processor
- Expense Report Approved
- CRS
Send Back - Option if you do not approve and want to send the Travel Request/Expense Report back to the Traveler with a comment. Traveler will be notified and will need to resubmit once completed. Approver can only add a comment, change a chartfield, and attach a document/receipt.

Approve - If the Travel Request/Expense Report has been reviewed and you are ready to approve, can click on the Orange Approve button.

Approve & Forward – “Reports To” Approver will have an Approve & Forward button. If you are a Budget Approver and want to Approve & Forward, you will need to add the approver from the Approval Flow Tab.

- Add the name of the person you want to approve. You can add multiple approvers at this time and the order you want to approve. Then click the orange Approve button.
  - International Travel needs to have the Dean and Vice Provost Dwayne Banks added to the workflow by the Budget Approver.
  - The Travel Request/Expense Report will then route to that individual and required to approve. As they are being added as a “Reports to” Approver, if they do not approve within the allowable timeframe, the request/expense report will move on to seek approval from the approver’s “Reports to” Approver.
Need More Information?

• For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at: https://fiscaff.sfsu.edu/content/sf-state-travel-center
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