

Approver's Guide to Concur

What is an Approver's role?

The role of an Approver is to look at the expense lines that belong to them and approve only those lines. You are no longer responsible for checking if each line is an allowable charge, Concur is designed to read charges for compliance.

Step One: Log into <u>Concur</u> using the SSO login.

Step Two: On the home screen, navigate to the **Approvals** tab on the top menu bar or click **Required Approvals** from the Quick Task section.

SAP Concur C Travel Approvals	App Center	Help + Profile + 💄
CLEMSIN	+ Enter Reservation	03 Required Approvals
TRIP SEARCH	ALERTS	
Booking for myself Book for a guest	As an employee of Clemson University, you are eligible for a free Tripit Pro subscription. Learn More	and Activate Not right now
X9 🛱 🛏 9	You haven't signed up to receive e-receipts. Sign up here	
Please select your preferred departure and return flight times from the drop down menus provided below. The tool	COMPANY NOTES	
will automatically search for flight options within +/- 8 hours of your selected preferred times. You may adjust this +/-	Clemson Travel and Expense Toolkit	

App Center SAP Concur 🖸 Travel Approvals Home Requests Reports Approvals 00 03 Request Expense Reports Expense Reports Amount Due Employee Report Name Employee Report Date Requested Am 11/202 TEST, StaffTravele 11/10/2022 \$0.00 \$1,571.83 Airline Fees TEST, StaffTraveler \$0.00 **1**0 06/01/2022 \$1,413.81 TEST, StaffTravele 05/27/2022 \$0.00 \$1,187.50 â 🔾 auest visit

Step Three: Reports that require your approval will show here. To view a report, click the **Report Name**.

Step Four: Notice the totals at the bottom of the report and the three different categories. **Cost Object Approved Amount** indicates to the Approver the amount that they are approving. The line items that correspond to this amount are marked by the icon next to the total; look for this icon to see the specific charges that need to be approved. If an expense was itemized, click the arrow next to the line item to expand the expense and view the icons. **Note:** This amount may or may not match the Total Amount of the entire report. If you are not seeing any of the cost object approver icons, click the divider between date and expense type and drag to the right. This will allow all icons to be shown.

	SAP Concur 🕞 Trav	el Approvals /	App Center			Help + Profile +
	Approvals Home Request	s Reports				
11/2022 [Summary Details						Send Back to User Approve Hide Exceptions
Exceptions Expense Type Date Unallowable C 05/15		will route for Business Office	r approval on unallowable expense(s).			×
05/19/2022	Expense Type Unallowable Charges (not in policy) Express Payment Service Merchant, Gaf		Summary Report Summary Report Totals			
05/19/2022	Fraudulent Charges	\$1,418.25 \$1,4	418.	Amount Due Company \$0.00	Amount Due Company Card \$1,571.83	Amount Due Employee \$0.00
	Office Supplies Taxicable and Limousines Taxicable and Limousines Total AMOUNT Image: State and Sta	NT TOTAL APPROVE				

At this point you can click on any line item to open more details about the report or hover over any of the icons to see more details. If you want to see details about the Report Header, click the title of the report to open that screen.

Step Five: If you approve the charges that belong to your budget you can click **Approve** to finish. You also have the option to add an extra approver to the workflow if needed. **Note:** This extra approver will be the final approver in the workflow.

Optional Workflow Addition (adds an extra approver to the workflow):

1. Click **Details** under the Report Header and then **Approval Flow**

11/2022 [TEST, StaffTraveler]						Send Back to User Approve
Summary Details • Receipts • Print •						Hide Exceptions
Exceptions Expense Type Incline the Control of Cotals						×
Unallowable C. Iotais .62 A WARNIN Audit Trail Approval Flow	3: Report will route for B	usiness Officer app	proval on unallowable expense(s).			
Expenses Comments Date Allocations	Amount	View • « Approved	summary Report Summary			
Allocations s (not in policy)		\$62.62	Report Totals	Amount Due Company	Amount Due Company Car	
05/19/2022 Fraudulent Charges NOAH�S HOTELS	\$1,418.25	\$1,418.25		\$0.00	\$1,571.8	3 \$0.00
05/18/2022 Office Supplies Image: Constraint of the supplier of the supplice of the sup	\$90.96	\$90.96				

2. The approval flow box will pop up with a list of the current workflow approvers. To add an extra approver, click the **blue plus sign** and begin typing either the user's name, email address, or employee ID. Once your desired choice pops up, click the name to apply that selection.

Approval Flow for Report: 11/2022		×
(11/10/2022 Approved)		
→ Budget/Grant PI Approval:		
V Global: TEST, COA		
Departmental Default (CU-5365-15-1500000)		1
▼ 2009 ApJ Research Stipend (CU-0978-20-2006487)		1
User-Added Approver:		
	×	
Approve Send Back		
		_
	ave Workflow	Cancel

3. Once you've selected the name of the approver you want to add click **Approve**. An electronic agreement will pop up, click **Accept**.

How Do I Access Reports I've Approved in the Past?

1. From the **Approvals** tab, click **Reports**.

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Approvals H	ome Requests	Reports			
Approv	/als				
00 Requests	03 Expense Reports				
	Expense Reports				
Requests	Expense Reports	Employee	Report Date	Amount Due Employee	Requested Amount
Requests	Expense Reports	Employee TEST, StaffTraveler	Report Date	Amount Due Employee \$0.00	Requested Amount \$1,571.8
Requests Expense R	Expense Reports Report Name				

2. Click **View** and select the timeframe of past approvals you would like to see.

Approvals Ho	me	Requests Reports						
Expense Report List Reports Pending yo	Sui	r Approval(3)						
View *								
Reports Pending your Approval	ins	Mith 🗸	Go					
Reports you Approved this Month Reports you Approved last Month		Report Name	Comments	Report Date	Date Submitted	Total	Amount Due Emplo	Requested Amount
Reports you Approved this Quarter		11/2022		11/10/2022	11/10/2022	\$1,571.83	\$0.00	\$1,571.83
Reports you Approved last Quarter	ntr	level exceptions.						
Reports you Approved this Year								
Reports you Approved last Year		Airline Fees	Chartfields are valid.	06/01/2022	11/16/2022	\$1,413.81	\$0.00	\$1,413.81
All Reports you Approved		guest visit	Chartfields are valid.	05/27/2022	11/16/2022	\$1,187.50	\$0.00	\$1,187.50
	ntry	level exceptions.						

For questions regarding your role as Approver, reach out to your Business Office for more information. Questions regarding Concur can be directed to <u>clemsontravel@clemson.edu</u> and helpful resources are located on our <u>Travel & Expense Website</u>.