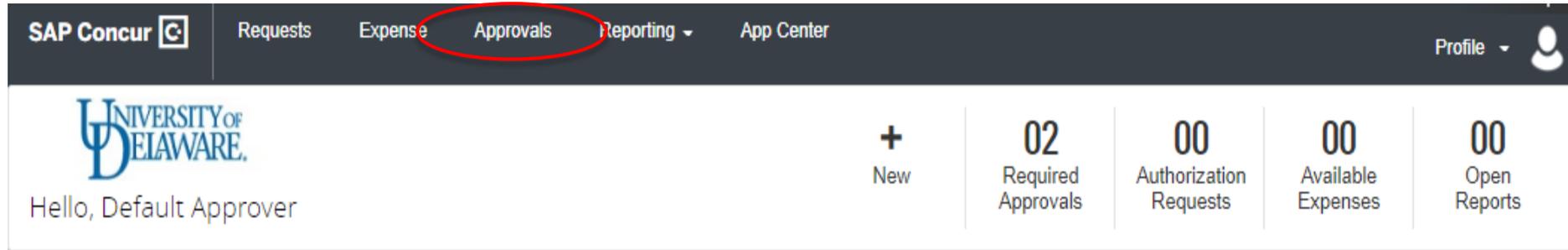


Travel and Expense Management in Concur

Approving Requests and Expense Reports
For
Cost Object Approvers

Your Required Approvals

- Sign into Concur at udel.edu/concur
- On your home page, select the Approvals tab

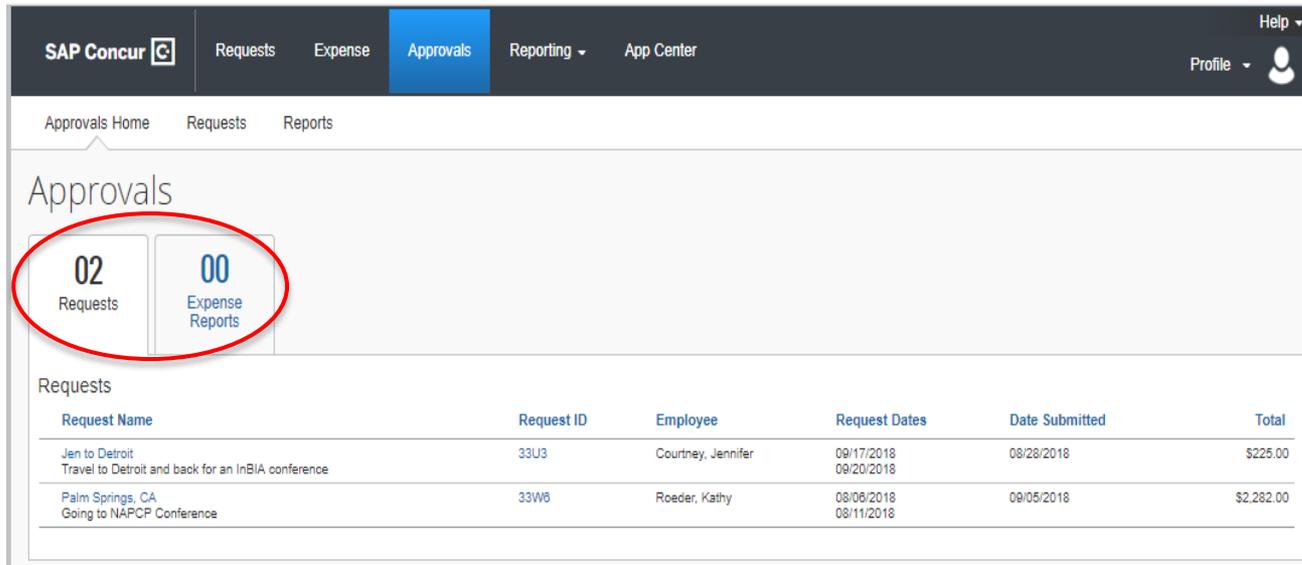


The screenshot shows the SAP Concur user interface. The top navigation bar includes the following items: SAP Concur logo, Requests, Expense, Approvals (highlighted with a red circle), Reporting (with a dropdown arrow), and App Center. On the right side of the navigation bar, there is a Profile dropdown menu and a user icon. Below the navigation bar, the main content area displays the University of Delaware logo and the text "Hello, Default Approver". To the right of the logo, there is a "+ New" button. Further right, there are four summary cards: "02 Required Approvals", "00 Authorization Requests", "00 Available Expenses", and "00 Open Reports".



Your Required Approvals cont'd...

- On the Approvals page, you will see two tabs, one with Requests awaiting your approval and one with submitted Expense Reports awaiting your approval
- Each tab will have a number indicating how many of each type you have to approve



SAP Concur

Requests Expense Approvals Reporting App Center

Help Profile

Approvals Home Requests Reports

Approvals

02 Requests

00 Expense Reports

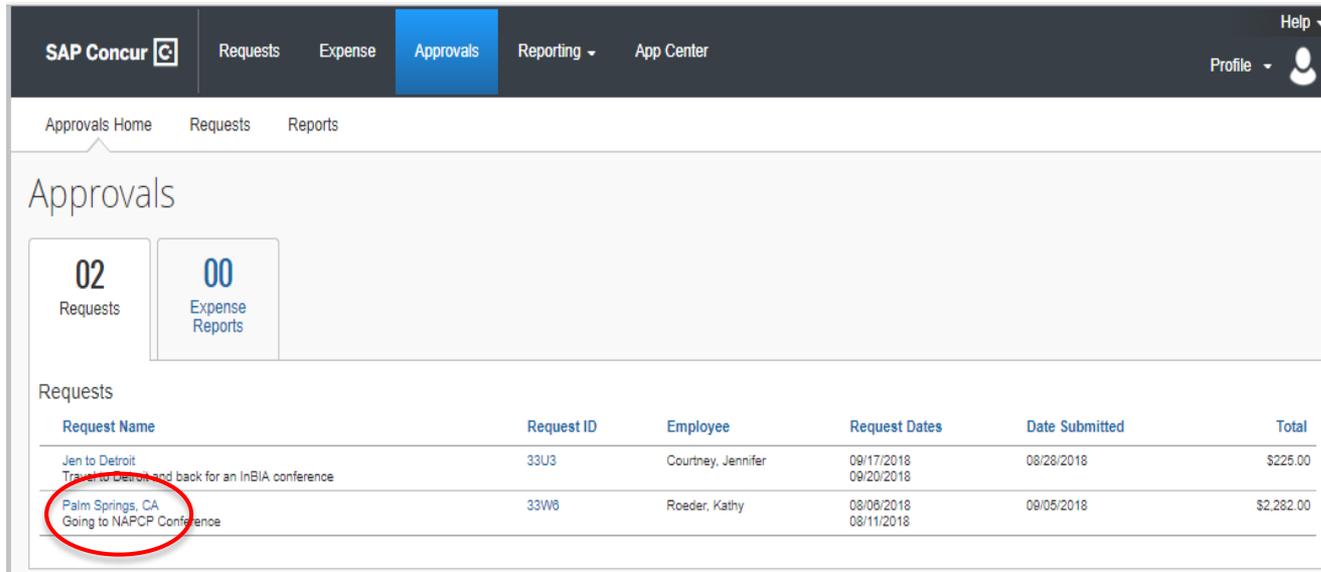
Requests

Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Jen to Detroit Travel to Detroit and back for an InBIA conference	33U3	Courtney, Jennifer	09/17/2018 09/20/2018	08/28/2018	\$225.00
Palm Springs, CA Going to NAPCP Conference	33W6	Roeder, Kathy	08/06/2018 08/11/2018	09/05/2018	\$2,282.00



Your Required Approvals cont'd...

- Make Request approvals a priority since they are related to travel and are often time sensitive
- Click on the Request you want to review to open the Request



The screenshot shows the SAP Concur interface for the 'Approvals' section. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals' (highlighted), 'Reporting', and 'App Center'. The main content area displays 'Approvals' with two summary cards: '02 Requests' and '00 Expense Reports'. Below this is a table of requests. The second row, 'Palm Springs, CA Going to NAPCP Conference', is circled in red.

Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Jen to Detroit Travel to Detroit and back for an InBIA conference	33U3	Courtney, Jennifer	09/17/2018 09/20/2018	08/28/2018	\$225.00
Palm Springs, CA Going to NAPCP Conference	33W6	Roeder, Kathy	08/08/2018 08/11/2018	09/05/2018	\$2,282.00



Reviewing a Request

- As the Cost Object Approver, your responsibility is to review the Request for budgetary and policy compliance
- The Expense Summary tab will show you the intended expenses, the estimated cost, and the intended allocation

Request 33WK [Test, Traveler2]

Request/Trip Name: Test - TRANDATE
Trip Details: Test

Request Header Segments **Expense Summary** Approval Flow Audit Trail

Allocations

Percentage	Speedtype	Project ID	UD User Field	Work Order #	Code
100	(PURC110000) ...				(PURC110000) ...

Date	Expense Type	Amount	Requested
09/07/2018	Group Lodging	\$500.00	\$500.00

- Remember that the dollar amounts on a request are *estimates* and not exact amounts that have already been spent.



Reviewing a Request cont'd...



- Based on your review, select either Approve or Send Back Request
- If you choose to Send Back a Request, you will need to add a comment explaining why the Request is being returned

Send Back Request

Comment History

Creation date	Entered By	Comment Text
---------------	------------	--------------

Add a comment to explain why you are returning the request. Then click OK to return the request to the employee.

Comment

OK Cancel



Reviewing an Expense Report

- To review Expense Reports awaiting your approval, select the Expense Reports tab

SAP Concur Requests Expense **Approvals** Reporting App Center Help

Profile

Approvals Home Requests Reports

Approvals

00 Requests

03 Expense Reports

Expense Reports

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
TEST-SAE-REIMB-NEW-VENDOR test SAE-REIMB-NEW-VENDOR	Roeder, Kathy	09/05/2018	\$121.00	\$121.00
Local Travel Meeting with downstate personnel	Roeder, Kathy	06/19/2018	\$440.21	\$440.21
BOA Conf Bank of America Conference from 6/23/2018 thru 06/27/2018. New features of credit card	Roeder, Kathy	06/15/2018	\$128.50	\$128.50



Reviewing an Expense Report cont'd...

- Click on the Report Name of the Expense Report you want to review

Expense Reports

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
TEST-SAE-REIMB-NEW-VENDOR test SAE-REIMB-NEW-VENDOR	 Roeder, Kathy	09/05/2018	\$121.00	\$121.00
Local Travel Meeting with downstate personnel	 Roeder, Kathy	06/19/2018	\$440.21	\$440.21
BOA Conf Bank of America Conference from 8/23/2018 thru 08/27/2018. New features of credit card	Roeder, Kathy	06/15/2018	\$126.50	\$126.50

- As with Requests, once you have reviewed the trip for appropriate business justification, you can either Approve or Send Back the Expense Report
- Once you have Approved the Expense Report, the related expenses will be routed to the general ledger



Questions?

- AskConcur@udel.edu
- udel.edu/procurement
- Procurement Services 302-831-2161

