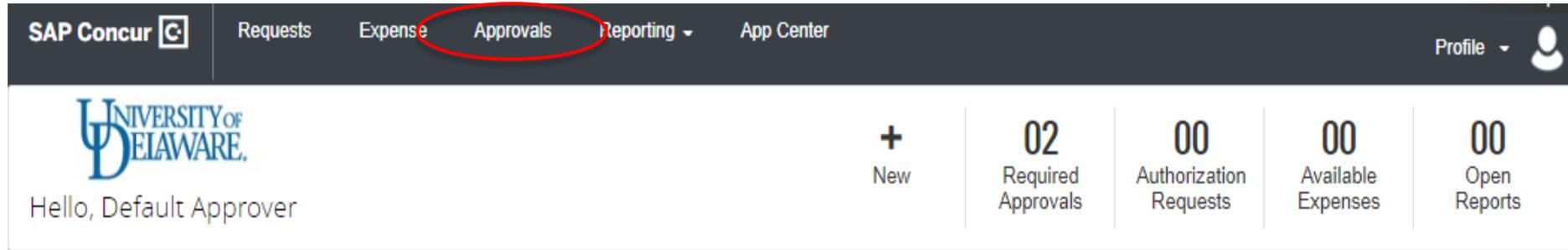


Concur Travel and Expense Management

Approving Requests & Expense Reports
for
Supervisors

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' with a 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 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 greeting, there is a '+ New' button and 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

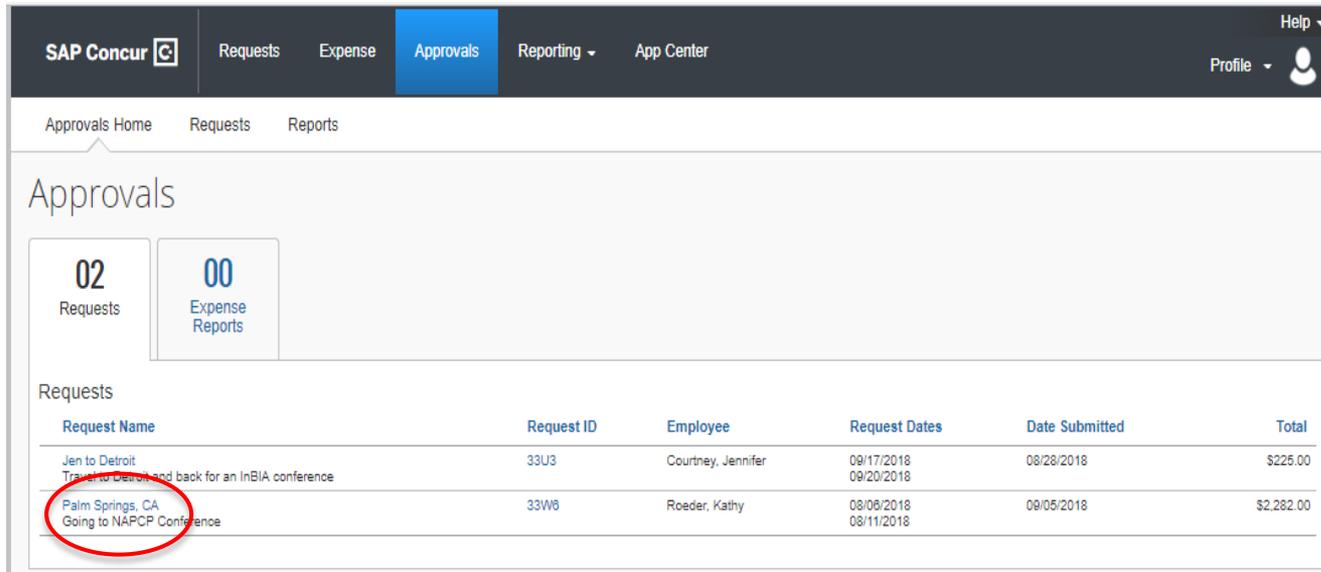
The screenshot displays the SAP Concur 'Approvals' page. At the top, the navigation bar includes the SAP Concur logo and tabs for 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Approvals' tab is selected. Below the navigation bar, there are links for 'Approvals Home', 'Requests', and 'Reports'. The main content area is titled 'Approvals' and features two summary cards: '02 Requests' and '00 Expense Reports'. The '02 Requests' card is circled in red. Below the summary cards is a table titled 'Requests' with columns for 'Request Name', 'Request ID', 'Employee', 'Request Dates', 'Date Submitted', and 'Total'.

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 titled 'Requests' with the following data:

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

The 'Palm Springs, CA' row is circled in red in the original image.



- Review the Request header to verify that the trip purpose and timeframe is appropriate for the employee and the department

Request 33W6 [Roeder, Kathy]

Request/Trip Name: Palm Springs, CA
Trip Details: Going to NAPCP Conference

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Type: *UD-Travel Request

Request/Trip Name	Request/Trip Start Date	Request/Trip End Date	Request/Trip Purpose	Destination City	Destination Country	How will you book travel?	Approval Required?
Palm Springs, CA	08/06/2018	08/11/2018	Conference/Professional Development	Palm Springs, California	UNITED STATES	1. Self-booked online in Concur Travel	Yes

Emergency Travel? No

Traveler Type	Trip Type	Will this trip include personal travel?	Personal Dates of Travel	Trip Details	Comments To/From Approvers
02. Staff/Grad Student	Domestic - Travel	No		Going to NAPCP Conference	

Speedtype	Project ID	UD User Field	Work Order #
(PURC110000) PROCUREMENT SERVICES			

User last name: Roeder, Kathy

Buttons: Cancel Save Attachments Print / Email **Send Back Request** **Approve** Approve & Forward

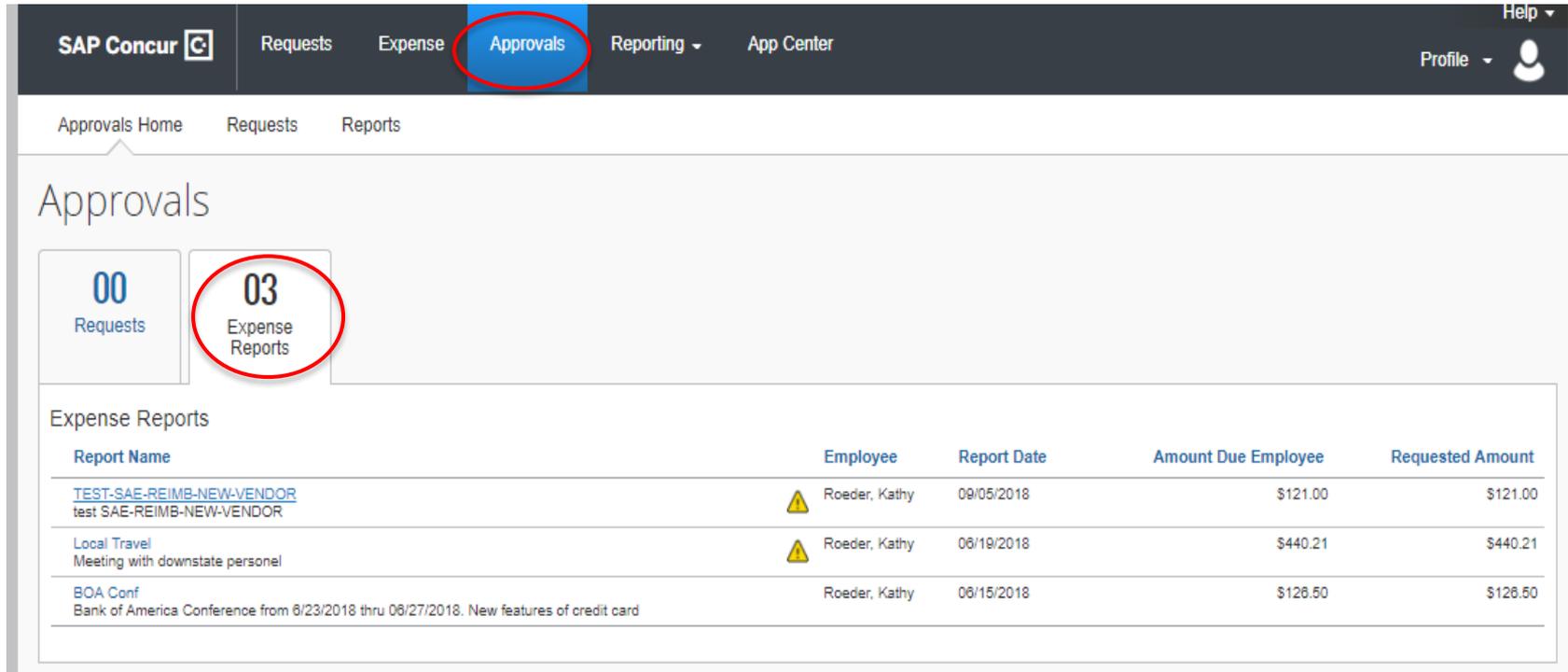
Status: Submitted & Pending Approval
Amount: \$2,282.00

- Based on your review select either Approve, Approve and Forward to another person to review, or Send Back Request



Your Required Approvals cont'd...

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



The screenshot shows the SAP Concur interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals' (highlighted with a red circle), 'Reporting', and 'App Center'. The 'Approvals' tab is selected, and the 'Expense Reports' sub-tab is also highlighted with a red circle. Below the navigation, there are two buttons: '00 Requests' and '03 Expense Reports'. The 'Expense Reports' section contains a table with the following data:

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



Your Required Approvals 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 personel	 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, Approve and forward to someone else for review, or Send Back
- Once you have Approved the Expense Report, it is routed to the Cost Object Approver who will review it for adherence to budget and policy



Questions?

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

