Approvals

This guide will take you through the steps for Approval of a request or expense report.

Accessing Concur

1. You will receive an email when a request or expense report is awaiting your approval.
2. To access Concur, you can either click on the link in the email or go to Travel.ou.edu and login with your 4x4 or username.
3. Click on either Approvals from the Main Menu or Required Approvals from the Quick Task Bar.

4. Requests and Expense Reports will be on two separate tabs.
Approvals

5. Click the appropriate tab and then click on the name of the request or expense report.

Requests

6. For requests, click on the Request Name and review the request details.
7. If the request is allowable, click on Approve.

8. There is only one approval step required by the system for requests.
9. If you want to have the request reviewed by another approver, click Approve & Forward.
10. You will be prompted to enter in the additional approver’s name. Please note that the individual must be an approver in the system for their name to appear. Once the correct name is populated, click Approve.

11. The additional approver will receive an email notifying them that a request is awaiting their approval.
12. If the request is not allowable, click Send Back Request.
13. You will be prompted to enter in a Comment regarding why the request was not approved. Once the comments are entered, click OK and the individual who entered the request will receive an email notifying them that their request has been returned.

Expense Reports

14. For expense reports, click on the Report Name and review the expense report details.
15. Click on the Report Name to review the chart field spread applied to the expense report.
16. Click on each expense line and review the expense details.
17. View the provided receipts by hovering over the receipt icon, if applicable.
18. View the expenses listed as personal by hovering over the personal icon, if applicable.
19. View the individual allocations by hovering over the allocation icon, if applicable.
20. Expenses can be altered by adding receipts, changing allocations or adding comments. Expenses cannot be altered by the approver if the alteration would result in a change the
Approvals

expense report amount. If any amount needs to be changed, the expense report must be sent back.

21. If the expense report is allowable, click on Approve.
22. Review the agreement in the Final Confirmation pop-up and click Approve.
23. If you want to have the expense report reviewed by another approver, click Approve & Forward.
24. You will be prompted to enter in the additional approver’s name. Please note that the individual must be an approver in the system for their name to appear. Once the correct name is populated, click Approve & Forward.
25. The additional approver will receive an email notifying them that an expense report is awaiting their approval.
26. If the expense report is not allowable or needs adjustments, click Send Back to User.
27. You will be prompted to enter in a Comment regarding why the expense report was not approved. Once the comments are entered, click OK.

Previous Approvals

28. To access previously approved reports, click on Approvals from the main menu.
29. Select Reports under the submenu.
Approvals

30. From this screen you can view previously approved reports by clicking on the blue View button and choosing from the drop-down menu to view reports approved This Month, Last Month, etc.

31. From this screen you can also choose to narrow down specific reports by selecting in the drop-down menu to view reports by Report Name, Employee Last Name, etc.

Delegate Approval

32. If you have been assigned as a delegate for approval functions, you will need to act on behalf of the original approver to see the requests/expense reports awaiting approval.

33. By default, once logged into Concur you will be in your own Profile. To act as a delegate, click on Profile and under the Acting as other user section, type in the name of the individual that you are a delegate for. Once the appropriate individual appears, click Start Session.

34. The Profile icon will show that you are Acting As another individual.

35. You now have access to all functions that the individual has granted you access to as a delegate.

Concur Mobile

36. If you have downloaded the Concur mobile app, approvals can be made from your device.

37. Once logged into the app, click on Approvals.

38. Both requests and expense reports awaiting your approval will display.

39. Click the request or expense report needing approval and review the details.

40. Click either Send Back or Approve.

41. If approving, you will be asked to confirm your approval again by clicking Approve.