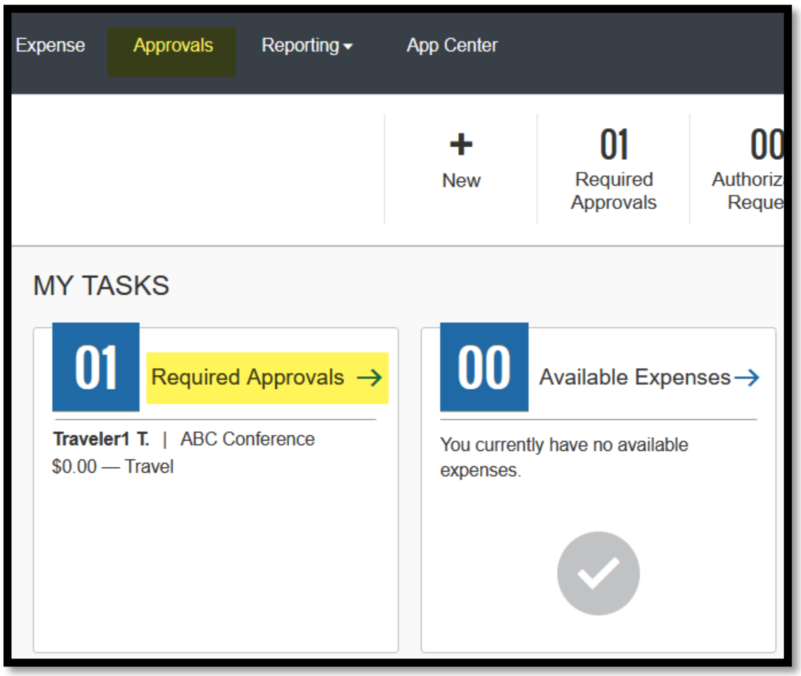
Approvals

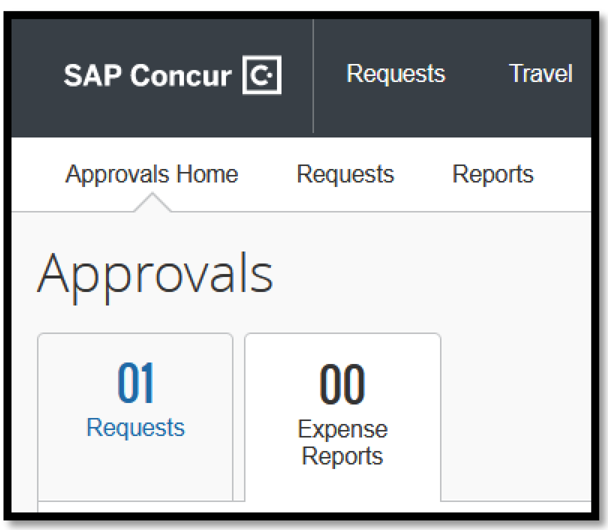
This guide will take you through the steps for **Approval** of a request or expense report.

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.



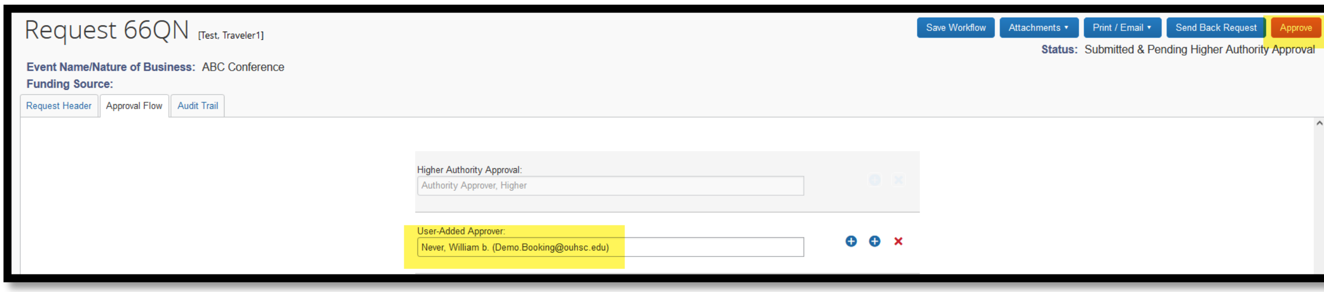
Approvals

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

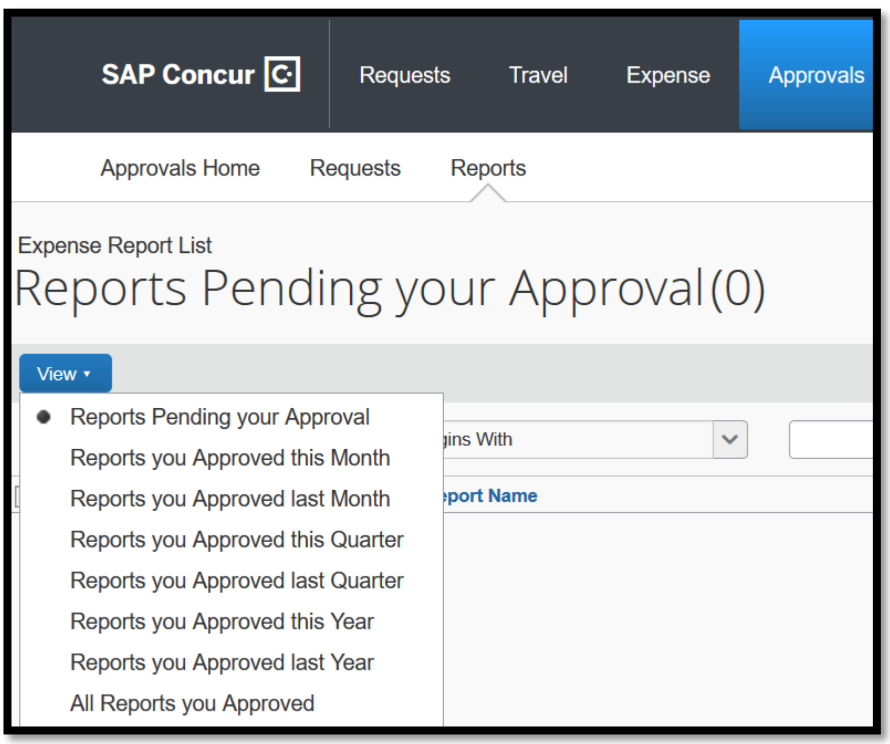
14. For expense reports, click on the **Report Name** and review the expense report details.
15. Click on the **Report Name** to review the chart field spread applied to the expense report.
16. Click on each **expense line** and review the expense details.
17. View the provided receipts by hovering over 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

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.

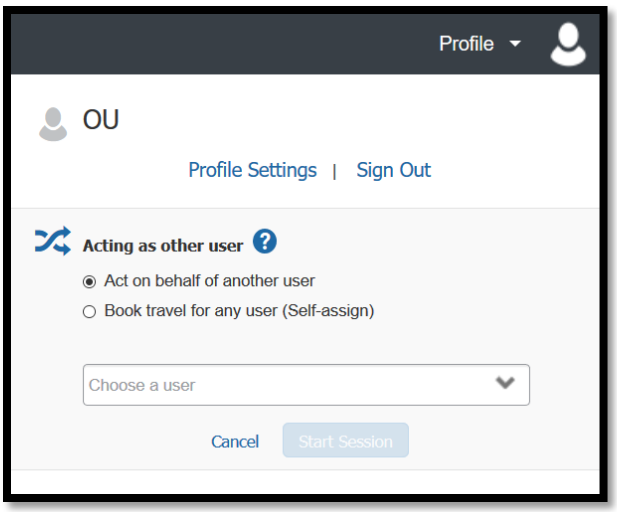


Approvals

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**.