

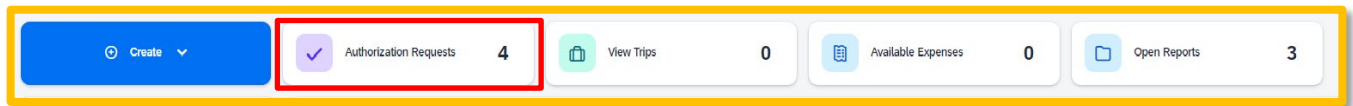


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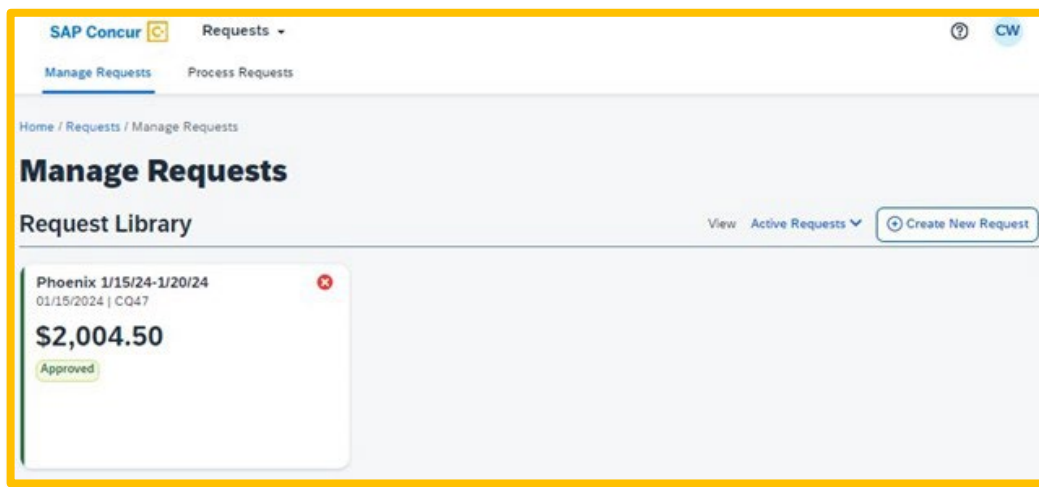
Approving a Travel Request

The approver will see requests awaiting approval under **Authorization Requests** on the Concur home page. Trip elements should not be booked until approval occurs.



1. Select the Request you wish to approve by clicking the **Request Name**.
2. Review the **Request Header** and the **Expense Summary** tabs. Things to consider:
 - a. Review destination and see if banned state or alerts for high hazard destinations are noted.
 - b. Take note of any personal days and consider that estimated costs are prorated accordingly (i.e. daily meal allowances, incidentals, etc.).
 - c. Review request comments and any attachments to obtain further information about purpose of trip.
 - d. Review all expenses for reasonableness and completeness.
3. There are three approval options:
 - a. **Approve** – approve the Request.
 - b. **Approve & Forward** – Approve and Forward the Request for additional approval. In the User-Added Approver box, type in the last name of the approver and select from the dropdown box. You can only select users who are already designated as approvers in the system. It is suggested to add a comment so that the recipient understands why they were added to the approval flow.
 - c. **Send Back Request** – Return the Request to the traveler. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.

Once the Travel Request has been acted on by the approver, notification regarding the status will be sent to the traveler (and the delegate if opted into notifications) and the status will be noted on the traveler's **Manage Requests** page.

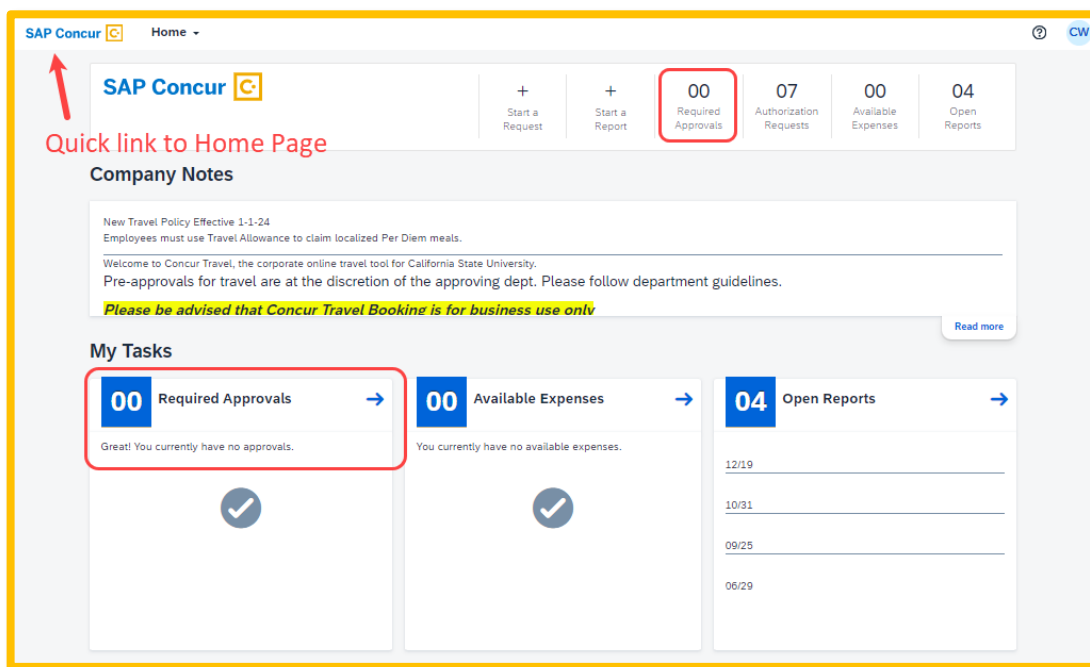


Approving an Expense Report

1. On the home page, in the **Required Approvals** section of **My Tasks**, click on **Required Approvals** title or the **blue arrow** to the right.

OR

On the home page, in the Quick Task Bar, click the **Required Approvals** option.



2. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
3. Review the report details:
 - a. Review dates and locations of expenses compared to the original request.
 - b. Take note of any personal days on the request and whether expenses were claimed on those dates.

Approvals Home

TEST [Test, CH Traveler]

Summary Details Receipts Print / Email

Expenses

| Transaction Date | Expense Type |
|------------------|----------------------|
| 01/28/2021 | Hotel/Lodging |
| 01/28/2021 | Airfare |
| 01/28/2021 | Breakfast - Domestic |
| 01/27/2021 | Breakfast - Domestic |
| 01/27/2021 | Dinner - Domestic |
| 01/27/2021 | Lunch - Domestic |
| 01/26/2021 | Dinner - Domestic |
| 01/11/2021 | Registration/Fees |

Previous Comment
Entered By CH Traveler Test: Test

Report Id: 753A44D5492741F9AB32 Report Key: 25618 Report/Trip Name: TEST

Travel Start Date: 01/26/2021 Travel End Date: 01/28/2021

Traveler Type: 2-Staff

Personal Dates of Travel-If none enter NA Are you travelling to a banned state? No

Business Unit Fund Class Project

User Name Report Currency Receipts Received

c. Compare the total amount being claimed for reimbursement with what was requested.

Expenses

| Transaction Date | Expense Type | Enter Vendor N... | City of Purchase | Reviewed | Amount |
|------------------|----------------------|-------------------|------------------|----------|---------|
| 02/07/2019 | Personal Car Mile... | | | No | \$17.98 |

TOTAL AMOUNT \$17.98 TOTAL APPROVED \$17.98

Summary

Report Summary

Report Totals

| Amount Due Company | Amount Due Employee |
|--------------------|---------------------|
| \$0.00 | \$17.98 |

Requests (1)

| Request Name | Request ID | Amount Approved | Amount Remaining |
|----------------------|------------|-----------------|------------------|
| Butte College (Main) | 34JT | \$18.56 | \$0.58 |

d. Review all expenses for reasonableness and completeness.

4. If you are satisfied with the Expense Report, click **Approve** in the top right corner of the screen.

Sending Back a Travel Request or Expense Report

During your review, you may choose to return the entire travel request or expense report to the employee for correction.

To return a report:

1. Click **Send Back to User** located on the top right corner.

Send Back to User Approve

2. The Send Back Report window appears.

Send Back Report

Comment History

| Date | Entered By | Comment Text |
|------|------------|--------------|
|------|------------|--------------|

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

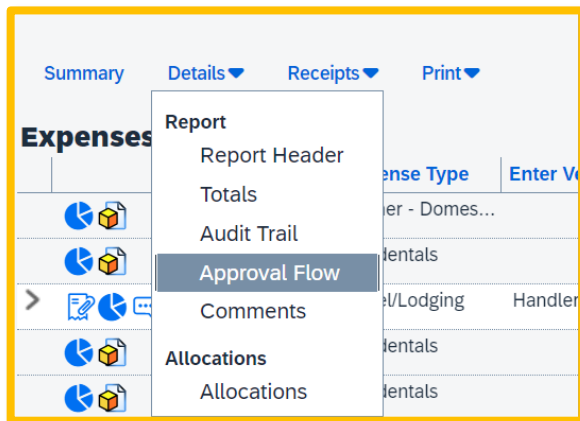
Comment

3. Enter a **Comment** for the employee explaining why you are returning the report.
4. Select **OK**.
5. The user will receive an auto notification via email that their report has been sent back with the comment.

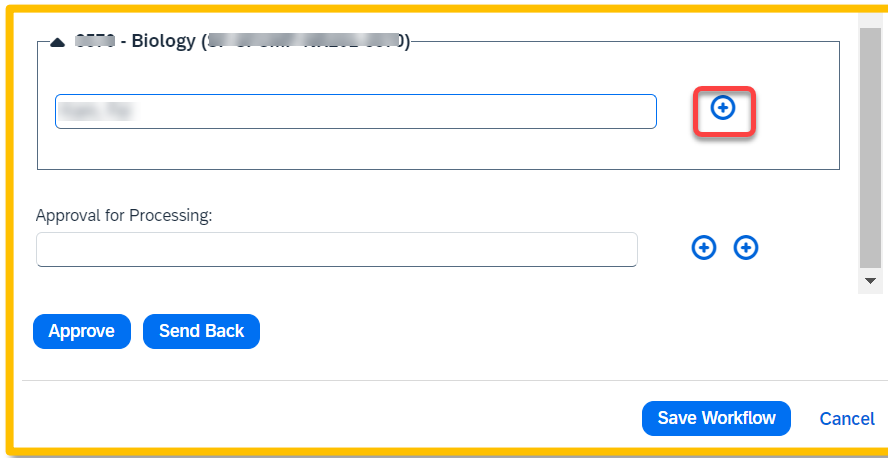
Edit Approval Flow

Budget Approvers can add additional approvers anywhere in the approval workflow.

1. Select **Details**, then **Approval Flow**.



2. Click the plus sign where you want to insert an additional approver into the workflow.

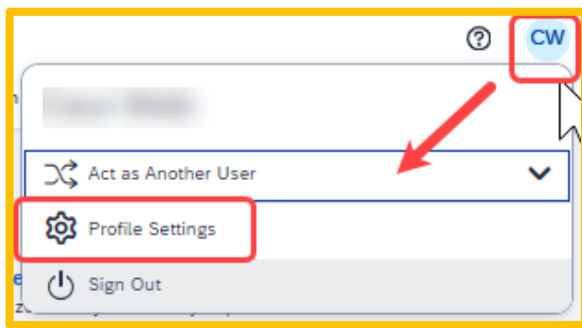


Do not add an additional approver after the Approval for Processing Step since this is the last step in the workflow.

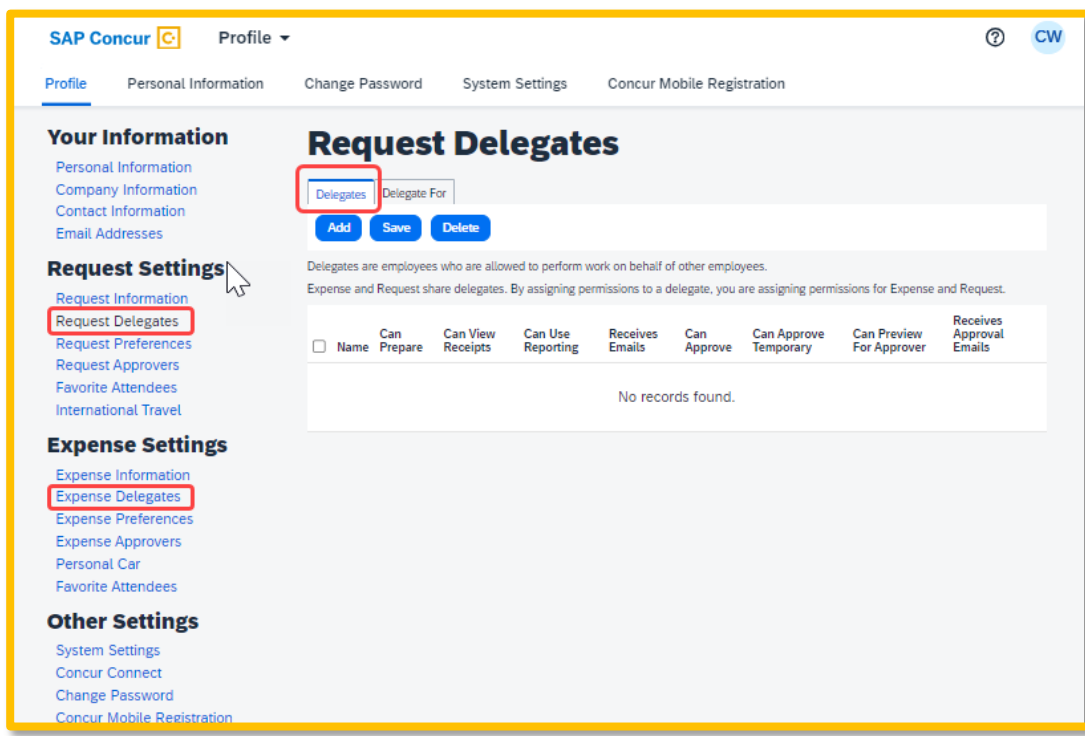
Assign Permissions to Delegates

By assigning permissions to a delegate, you are assigning permissions to both Request and Expense.

1. Open your profile by navigating to **Profile > Profile Settings**.

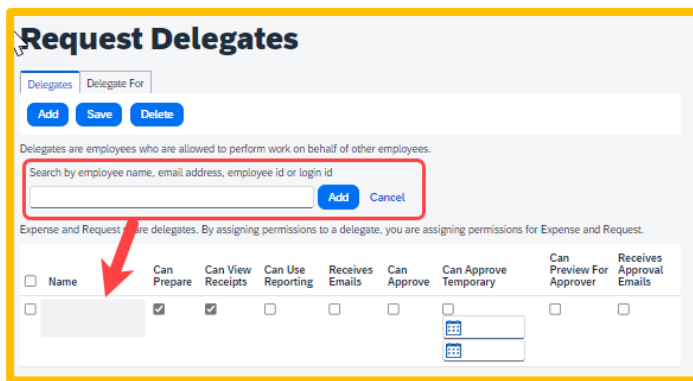


2. On the far-left navigation menu, under **Request Settings/Expense Settings** select the **"Request Delegates"/"Expense Delegates"** option.
3. Select the **"Delegates"** tab to add/edit/delete delegates (The **"Delegates For"** tab displays the individuals which have granted you delegate access to their profile).



4. Select **"Add"** then begin to type the person's email address, employee ID or name and select the correct name from the drop-down list.
5. Check the boxes that correspond with the permissions you are granting to the delegate. See the below table for descriptions of each permission option. ***Use caution when delegating approval rights.***

For example, if you wanted to delegate to review or "preview" all submitted travel requests/expense reports prior to your approval, you would check **"Can Preview for Approver"**. Check the **"Receives Approval Emails"** so that the delegate is also notified as submissions occur. You can also check **"Can Approve Temporary"** to add the dates of temporary approval authority.



6. Click **Save**.
7. To **delete a delegate**, click the checkbox to select the person, click **Delete**, and confirm deletion.

NOTE: Not all options may be available to all users. Delegate options are based on the individual user profiles access within Concur.

| Option | Description |
|---------------------------|--|
| *Can Prepare | If selected, the delegate can create requests and expense reports on your behalf. |
| *Can View Receipts | If selected, the delegate can view receipt images on your behalf. |
| *Receives Emails | If selected, the delegate receives a copy of each request and expense report related email that you receive, except for approval emails. |
| Can Preview for Approver | If selected, the delegate can preview requests and expense reports on behalf of another employee. This delegate cannot approve the request/expense report. |
| Receives Approval Emails | If selected, the delegate receives a copy of each approval-related email that you receive. |
| (*) Can Approve | DO NOT USE. The approval flow is defined by other systems behind the scenes. |
| (*) Can Approve Temporary | If selected, the delegate can approve requests and expense reports on your behalf but only for the specified period. If you select this option, you must also select beginning and ending dates. |

(*) *The option to delegate approver rights will only be available for Approvers in the system. The approver's rights can also only be delegated to another user who also has approval rights in the system. This function can be used for times when an approver is unavailable and approval tasks will be covered by another person in their absence (e.g., Dean unavailable so approvals would be routed to Associate Dean).*