



UNIVERSITY OF SOUTH ALABAMA

Concur How to Approve Reports

Procurement Card and Travel Services

<https://www.southalabama.edu/departments/financialaffairs/travelandprocurement/>

650 Clinic Drive, Suite 1400

Mobile, Alabama 36688

251.460.6242

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ALUMNI PLAZA

1. Log into Concur via desktop or mobile app. Steps 2-6 are for the desktop while steps 7-10 are for the mobile app.
2. After you have logged in you will have three options to access the reports you need to approve. Two will be listed as **Required Approvals** while the third is the **Approvals** tab at the top. Click either of these options to access the reports needing your approval.

The screenshot shows the SAP Concur dashboard. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals' (highlighted with a red box), 'Reporting', and 'App Center'. Below the navigation bar, there's a header with the University of South Alabama logo and 'Hello, Default'. A summary row shows: '+ New', '03 Required Approvals' (highlighted with a red box), '00 Authorization Requests', '00 Available Expenses', and '00 Open Reports'. The main content area is divided into 'TRIP SEARCH' (with a 'Mixed Flight/Train Search' form), 'ALERTS' (with 'COMPANY NOTES' about agenda and mileage), and 'MY TASKS'. The 'MY TASKS' section contains three cards: '03 Required Approvals' (highlighted with a red box), '00 Available Expenses', and '00 Open Reports'. The 'Required Approvals' card lists three items: 'USA T. | Testing \$2,150.00 — Travel', 'USA T. | Dallas, TX \$0.00 — Travel', and 'USA T. | Dallas, TX 1/30-2/1/17 \$797.66 — Expense'.

3. The reports you are needing to approve will be listed in the appropriate tab depending on type of report, **Trips**, **Requests**, or **Expense Reports**.

The screenshot shows the 'Approvals' page in SAP Concur. The top navigation bar is the same as the previous screenshot, but the 'Approvals' tab is now active. Below the navigation bar, there are sub-tabs: 'Approvals Home', 'Requests', and 'Reports'. The main heading is 'Approvals'. Below this, there are three summary cards: '00 Trips', '02 Requests', and '01 Expense Reports' (highlighted with a red box). Below these cards is a table titled 'Expense Reports' with the following data:

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Dallas, TX 1/30-2/1/17 John Doe is covering my classes	Traveler1, USA	08/24/2018	\$355.00	\$797.66

4. Click the tab with the report(s) you wish to review then select the report(s) one at a time.

The screenshot shows the SAP Concur interface with the 'Approvals' tab selected. Under the 'Expense Reports' section, a table lists reports. The first report is highlighted with a red box:

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Dallas, TX 1/30-2/1/17 John Doe is covering my classes	Traveler1, USA	08/24/2018	\$355.00	\$797.66

5. If you click on an Expense Report you will be taken directly to the listing of expenses. Review and if you approve click **Approve**, the orange button in the upper right-hand side of the screen. If you do not approve click **Send Back to User**. If you click Send Back to User you will need to enter a comment.

The screenshot shows the details of an expense report. At the top right, there are two buttons: 'Send Back to User' and 'Approve'. The 'Approve' button is highlighted with a red box. Below the report title, there is an 'Exceptions' section with a yellow box that says 'See note about exceptions'. The main part of the screen shows a list of expenses and a 'Report Summary' table.

Date	Expense Type	Amount	Requested
01/30/2017	Airfare American Airlines, Mobile, Alabama	\$340.00	\$340.00
01/30/2017	Hotel Hilton Hotels, Dallas, Texas	\$300.00	\$300.00
01/30/2017	Meals-Daily	\$85.00	\$55.00
04/17/2016	Taxi Tourist Attractions and Exhibits, Mobi	\$72.66	\$72.66

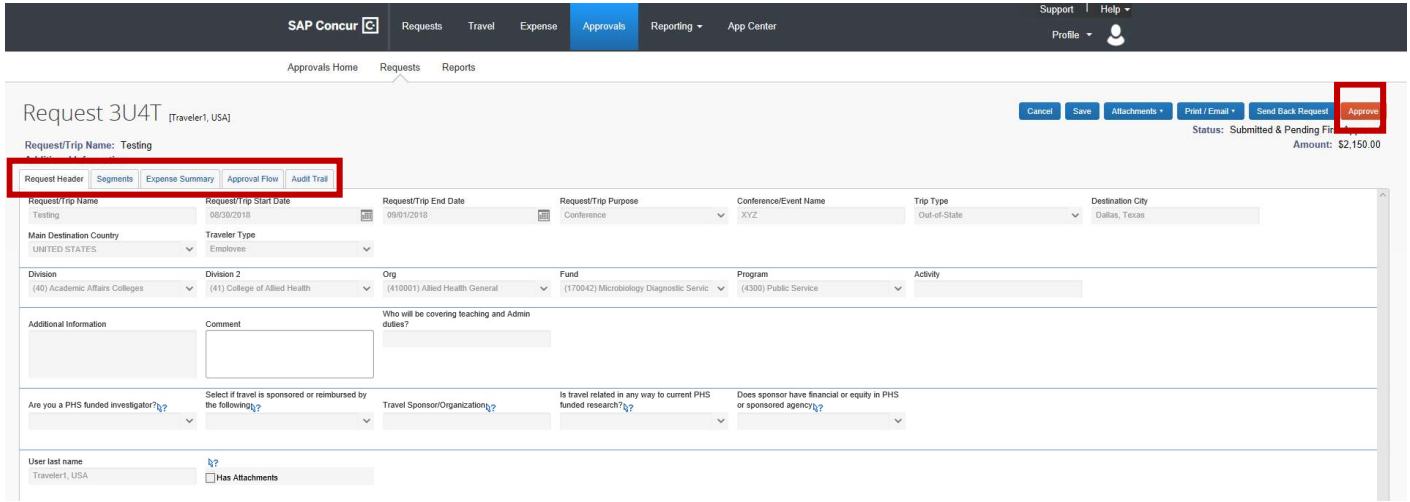
Report Totals	Amount Due Company	Amount Due Company Card	Amount Due Employee
	\$0.00	\$412.66	\$355.00

Request Name	Request ID	Amount Approved	Amount Remaining
Dallas, TX 1/30-2/1/17	34XL	\$1,350.00	\$1,010.00

TOTAL AMOUNT: \$797.66
TOTAL REQUESTED: \$767.66

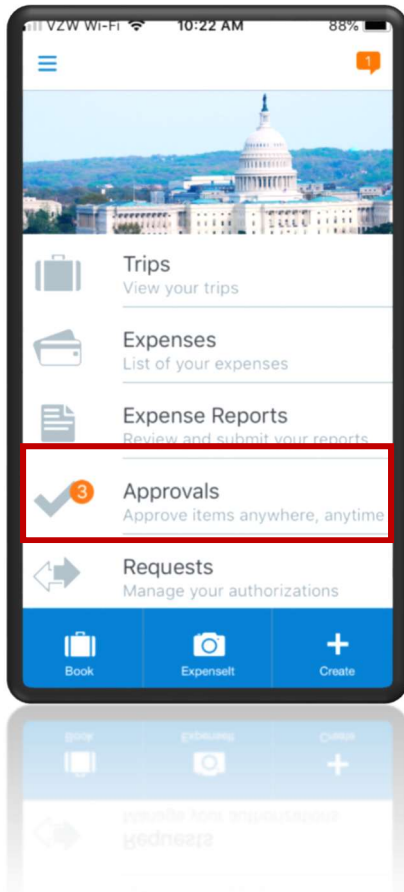
Note: Under the Exceptions category you will see any alerts pertaining to this report. The yellow triangles do not stop the report from moving forward. They are for informational purposes and to bring attention to certain items on the report.

6. If you click on a Request you will be taken directly to the Request Header. Review the request by clicking through the tabs and if you approve click **Approve**, the **orange** button in the upper right-hand side of the screen. If you do not approve click **Send Back Request**. If you click Send Back Request you will need to enter a comment.

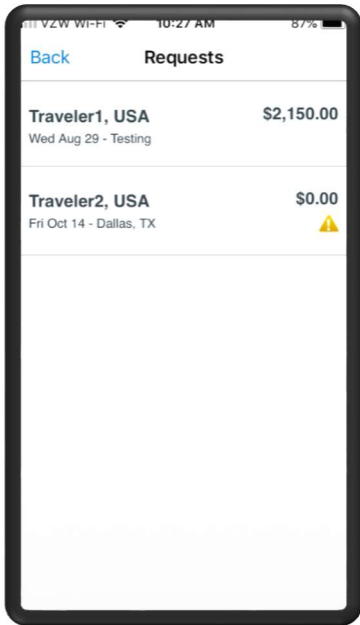


How to approve reports using the Concur mobile app

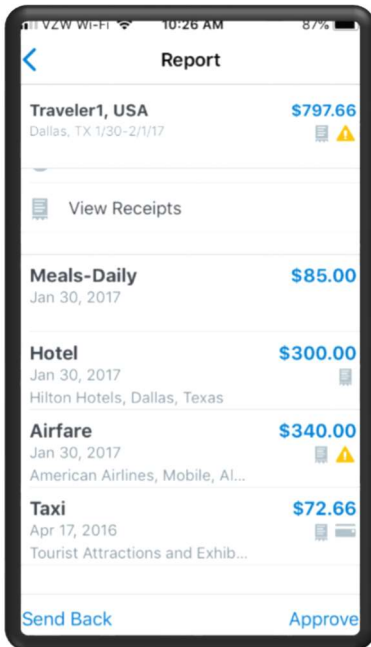
7. Log into Concur via the Concur app and click **Approvals**.



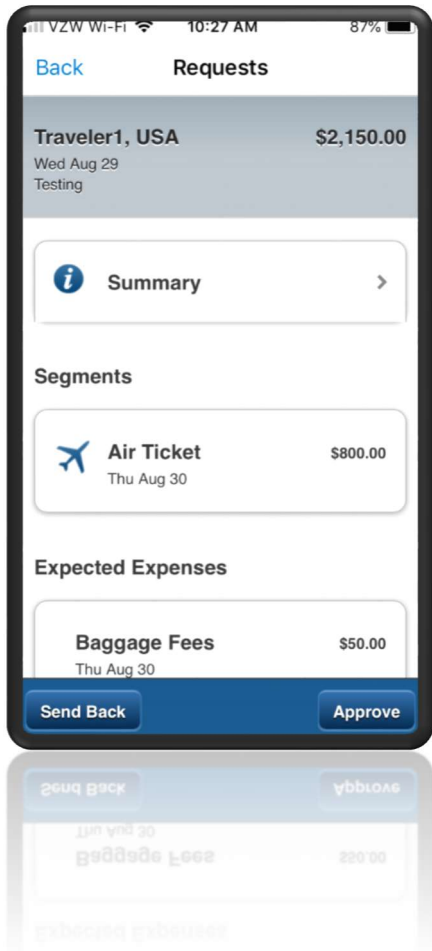
8. You will see the reports awaiting your approval listed as Report Approvals (Expense) or Request Approvals.



9. Select the reports you wish to review. If you select the Expense Report you will see a listing of expenses with the two options at the bottom, **Send Back** or **Approve**. If you select Send Back you will need to enter a comment.



10. Select the reports you wish to review. If you select the Request you will see three categories, Summary (header info), Segments (air, rail, rental, hotel), and Expected Expenses. You can select Summary to see dates, purpose, and location of travel. Selecting the other two shows you the expenses. Located at the bottom are the two options, **Send Back** or **Approve**. If you select Send Back you will need to enter a comment.



TIP

HOW TO VIEW A HISTORY OF REPORTS YOU HAVE APPROVED

If you wish to view a history of reports you have approved log into Concur and click **Approvals** then click **Reports**. On screen will be any reports pending your approval however, you can click the **View** button and select which reports you wish to see.

