



# UNIVERSITY OF SOUTH ALABAMA

## Concur How to Approve Reports

Procurement Card and Travel Services

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

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*Revised August 28, 2018*



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- 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.

SAP Concur

RequestsTravelExpenseApprovalsReportingApp Center

SupportHelp

Profile

UNIVERSITY OF SOUTH ALABAMA

Hello, Default

New

03Required Approvals

00Authorization Requests

00Available Expenses

00Open Reports

TRIP SEARCH

Mixed Flight/Train Search

Round TripOne WayMulti City

From

Departure city, airport or train station

Find an airportSelect multiple airports

To

Arrival city, airport or train station

Find an airportSelect multiple airports

Search

Show More

MY TRIPS (0)

You currently have no upcoming trips.

ALERTS

COMPANY NOTES

Agenda

Did you remember to attach your agenda or at-a-glance from your conference or meeting to your expense report? Failure to do so could result in your expense report being returned to you and a delay in your reimbursement as well.

Personal Car Mileage

Effective January 1, 2018, the personal car mileage rate is 54.5 cents per mile.

This site is for University Travel only

Read more

MY TASKS

03Required Approvals

00Available Expenses

00Open Reports

USA T. | Testing  
\$2,150.00 — Travel

USA T. | Dallas, TX  
\$0.00 — Travel

USA T. | Dallas, TX 1/30-2/1/17  
\$797.66 — Expense

You currently have no available expenses.

You currently have no open reports.

- 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**.

SAP Concur

RequestsTravelExpenseApprovalsReportingApp Center

SupportHelp

Profile

Approvals HomeRequestsReports

Approvals

00Trips

02Requests

01Expense Reports

Expense Reports

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.

**SAP Concur** | Requests | Travel | Expense | **Approvals** | Reporting | App Center | Support | Help | Profile

Approvals Home | Requests | Reports

## Approvals

00 Trips

02 Requests

**01 Expense Reports**

### Expense Reports

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.

**SAP Concur** | Requests | Travel | Expense | **Approvals** | Reporting | App Center | Support | Help | Profile

Approvals Home | Requests | Reports

## Dallas, TX 1/30-2/1/17 [Traveler1, USA]

Summary | Details | Receipts | Print / Email

[Send Back to User](#) **Approve** | Hide Exceptions

### Exceptions

Expense Type	Date	Amount	Exception
N/A			ATTN: The report has been submitted greater than 60 past the end of your travel. The reimbursement amount will be treated as income subject to withholding according to federal income tax regulations section 1.62-2.
Airfare	01/30/2017	\$340.00	Note: Please make sure the correct payment type for this Airfare has been selected.

[See note about exceptions](#)

### Expenses

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

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

### Report Summary

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

Requests (1)

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

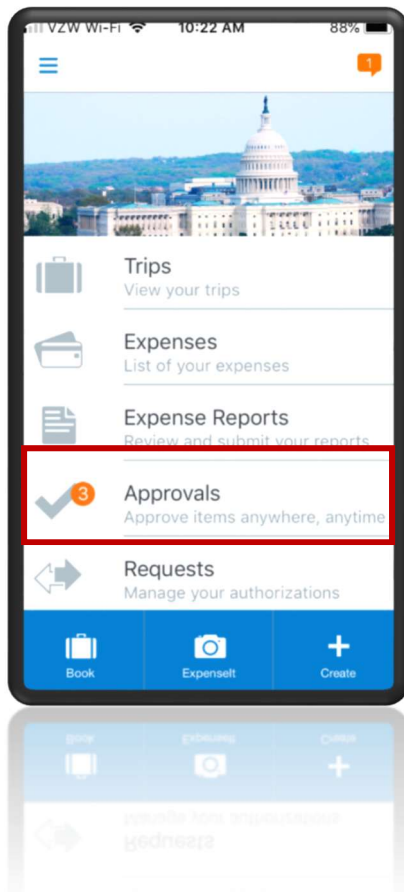
**Note:** Under the Exceptions category you will see any alerts pertaining to this report. The yellow triangles do not stop the report from moving forward. They are for informational purposes and to bring attention to certain items on the report.

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.

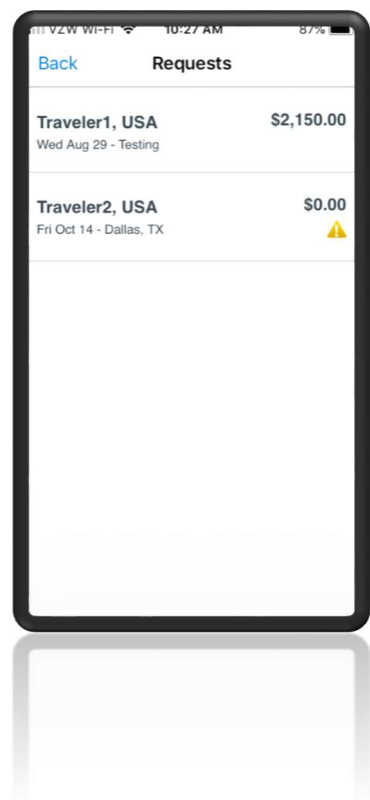
The screenshot shows the SAP Concur web interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Approvals' tab is active. Below the navigation bar, there is a header for 'Request 3U4T' with a status of 'Submitted & Pending For Approval' and an amount of '\$2,150.00'. The 'Request Header' tab is selected in the top left navigation bar. The main content area shows the request details, including 'Request/Trip Name', 'Request/Trip Start Date', 'Request/Trip End Date', 'Request/Trip Purpose', 'Conference/Event Name', 'Trip Type', and 'Destination City'. There are also sections for 'Main Destination Country', 'Traveler Type', 'Division', 'Org', 'Fund', 'Program', and 'Activity'. At the bottom, there are sections for 'Additional Information', 'Comment', and 'Who will be covering teaching and Admin duties?'. The 'Approve' button is highlighted in orange in the top right corner.

## How to approve reports using the Concur mobile app

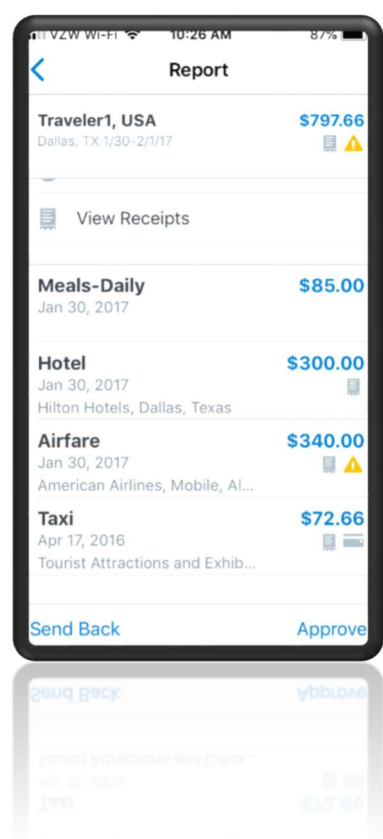
7. Log into Concur via the Concur app and click **Approvals**.



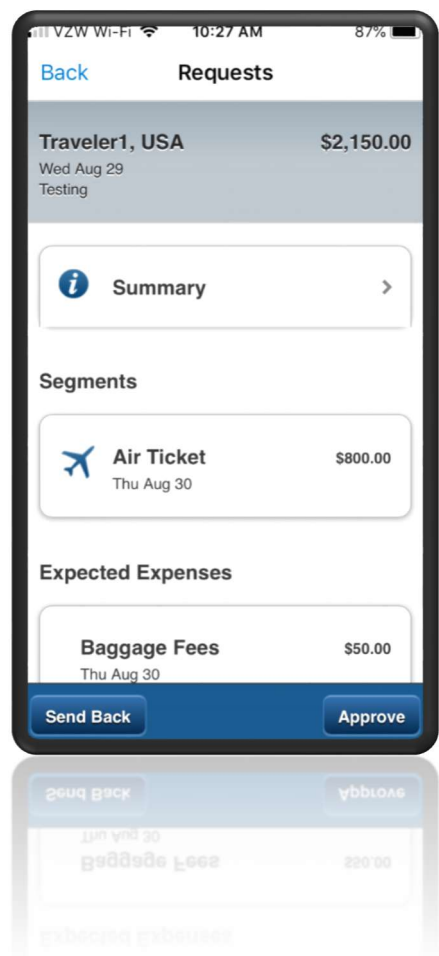
8. You will see the reports awaiting your approval listed as Report Approvals (Expense) or Request Approvals.



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.

