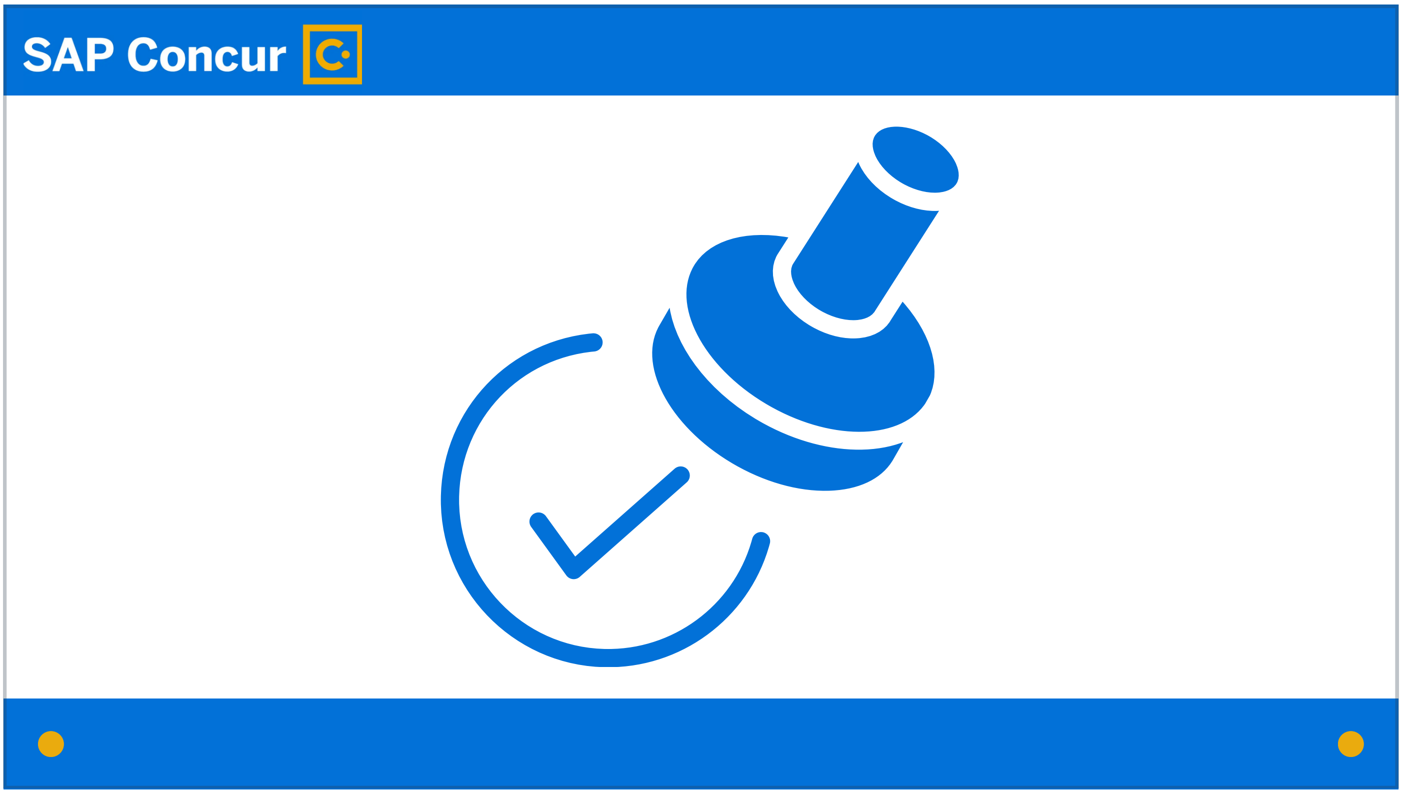
SAP Concur

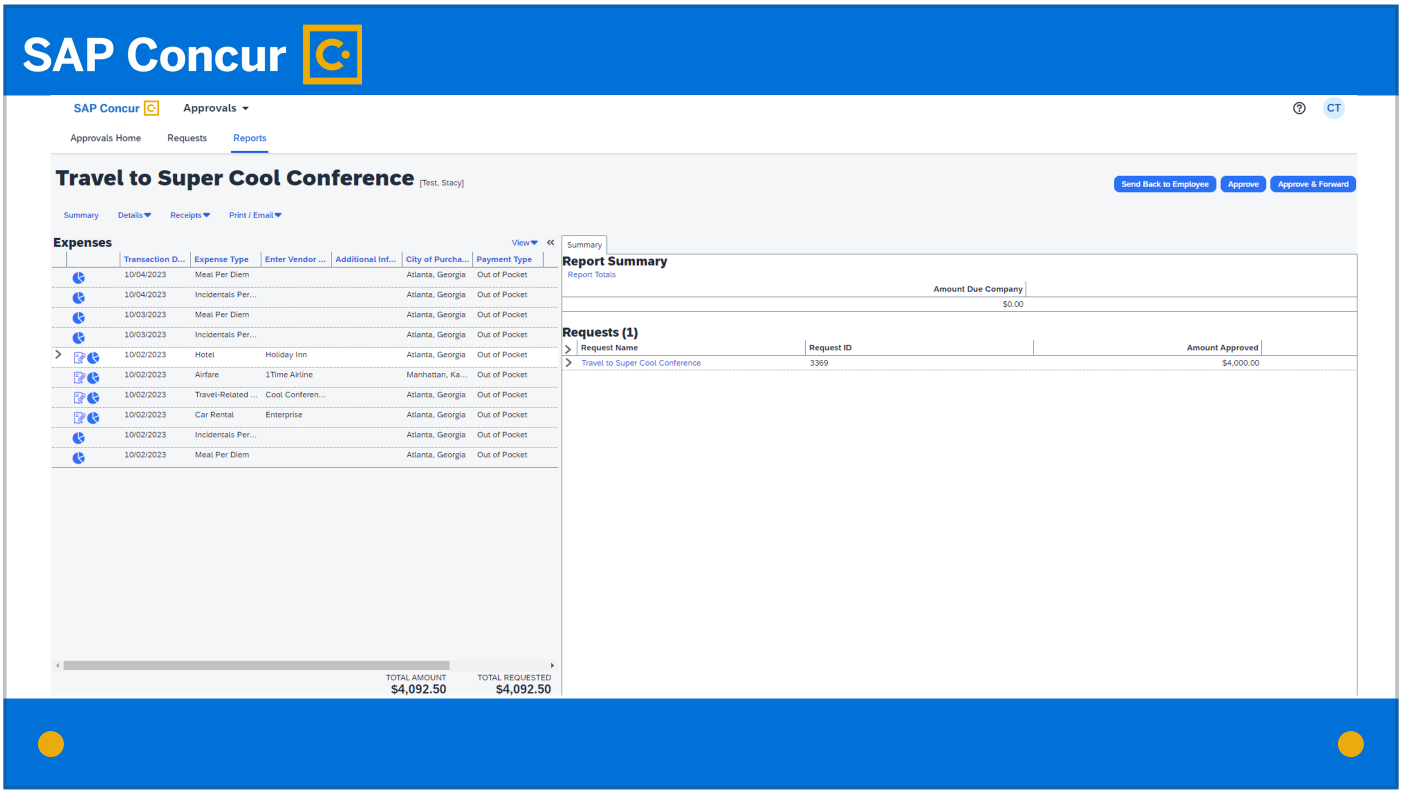
Workflow - Department Heads :

Approving Expense Reports

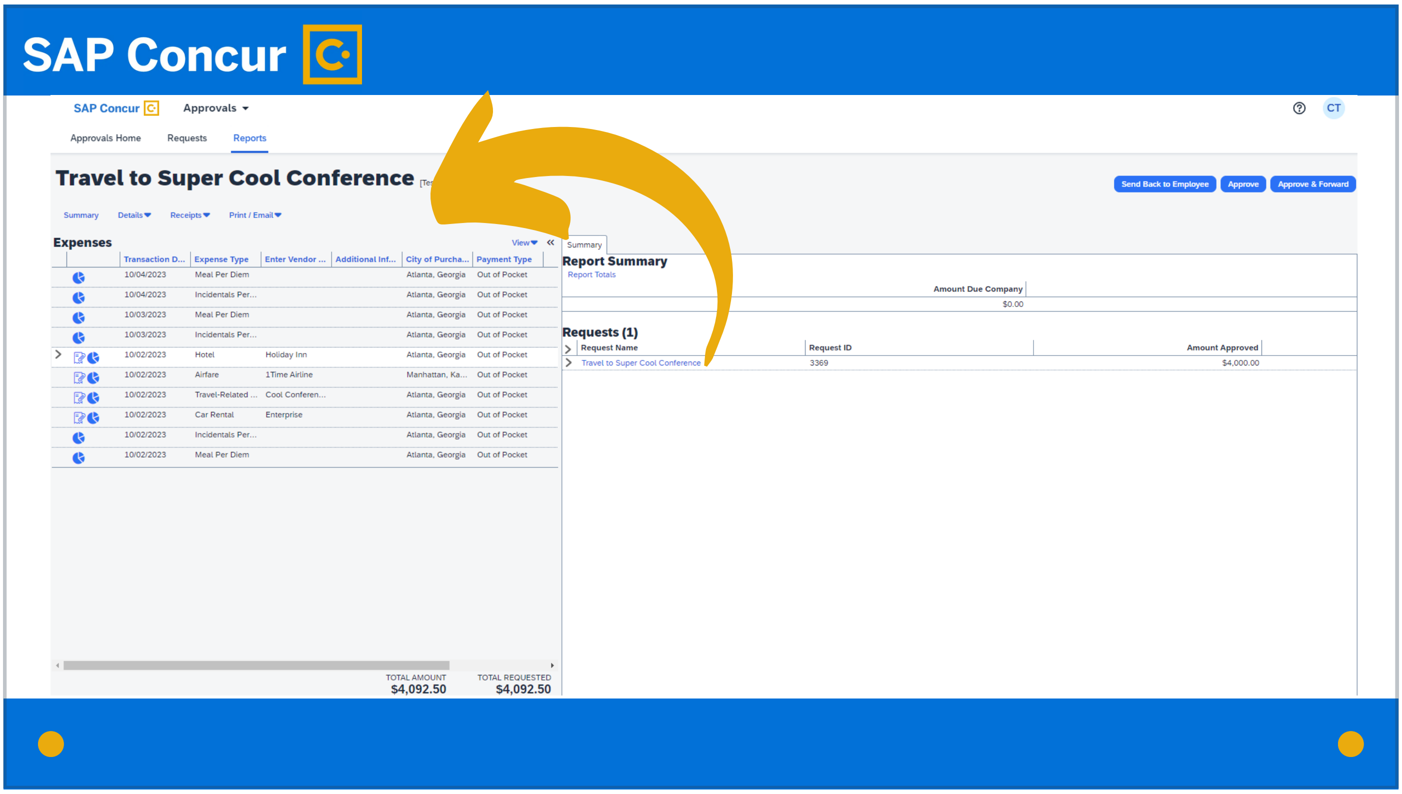
1. Welcome to our training on approving expense reports in Concur.



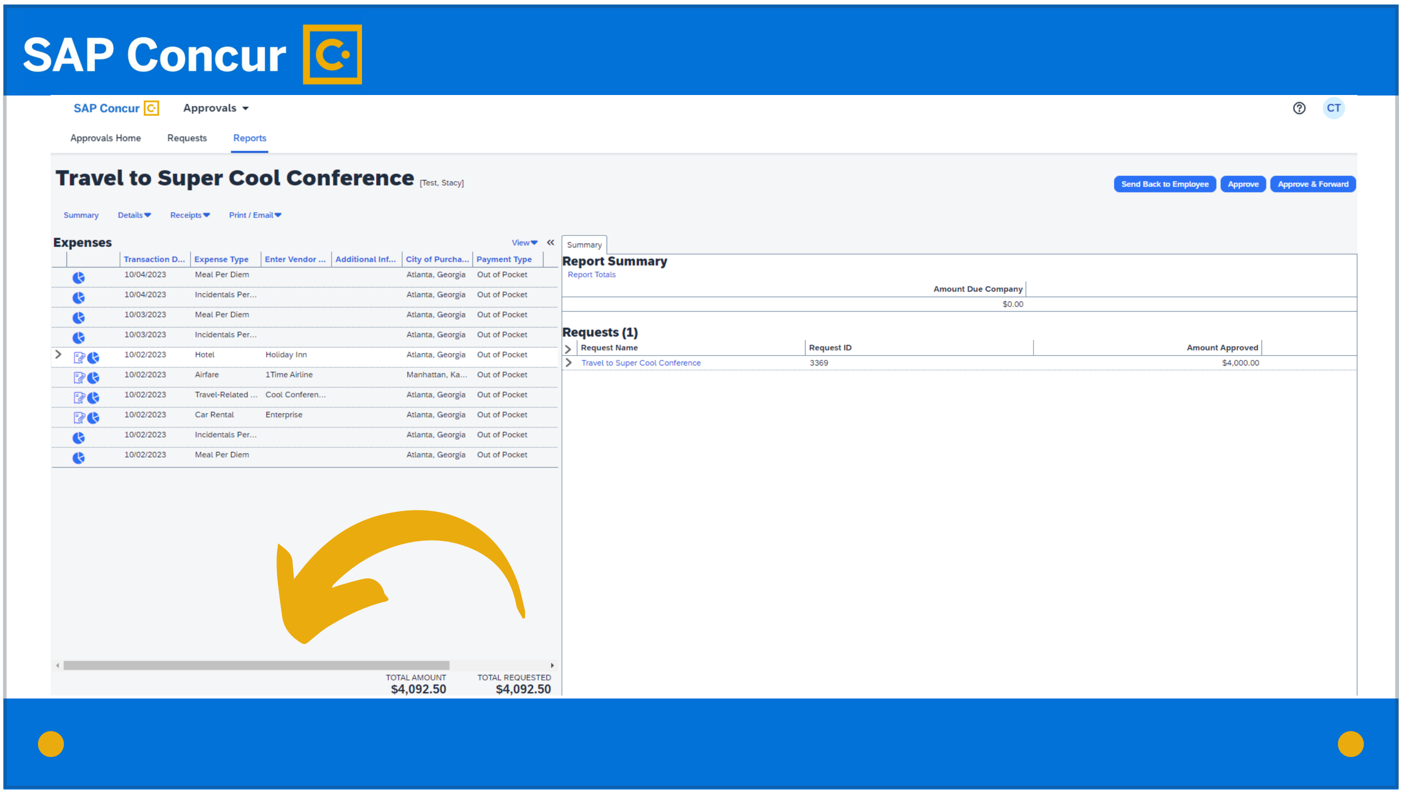
2. This training is specific to department heads who will review expense reports to make sure the expenses are allowable within and appropriate to the department. Department head approval of the report indicates that it is correct and sanctioned at the department level.



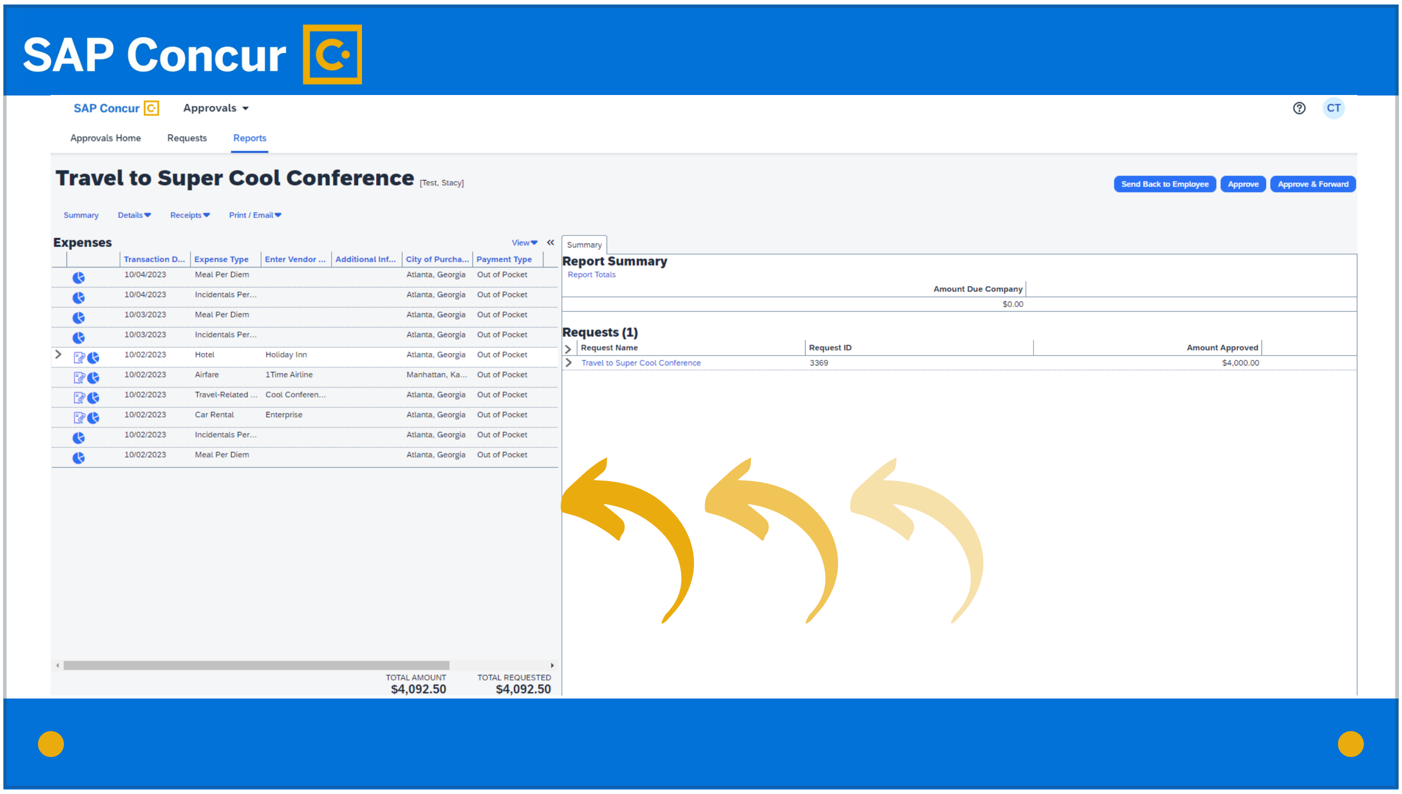
3. On the screen that allows you to view details of the report,



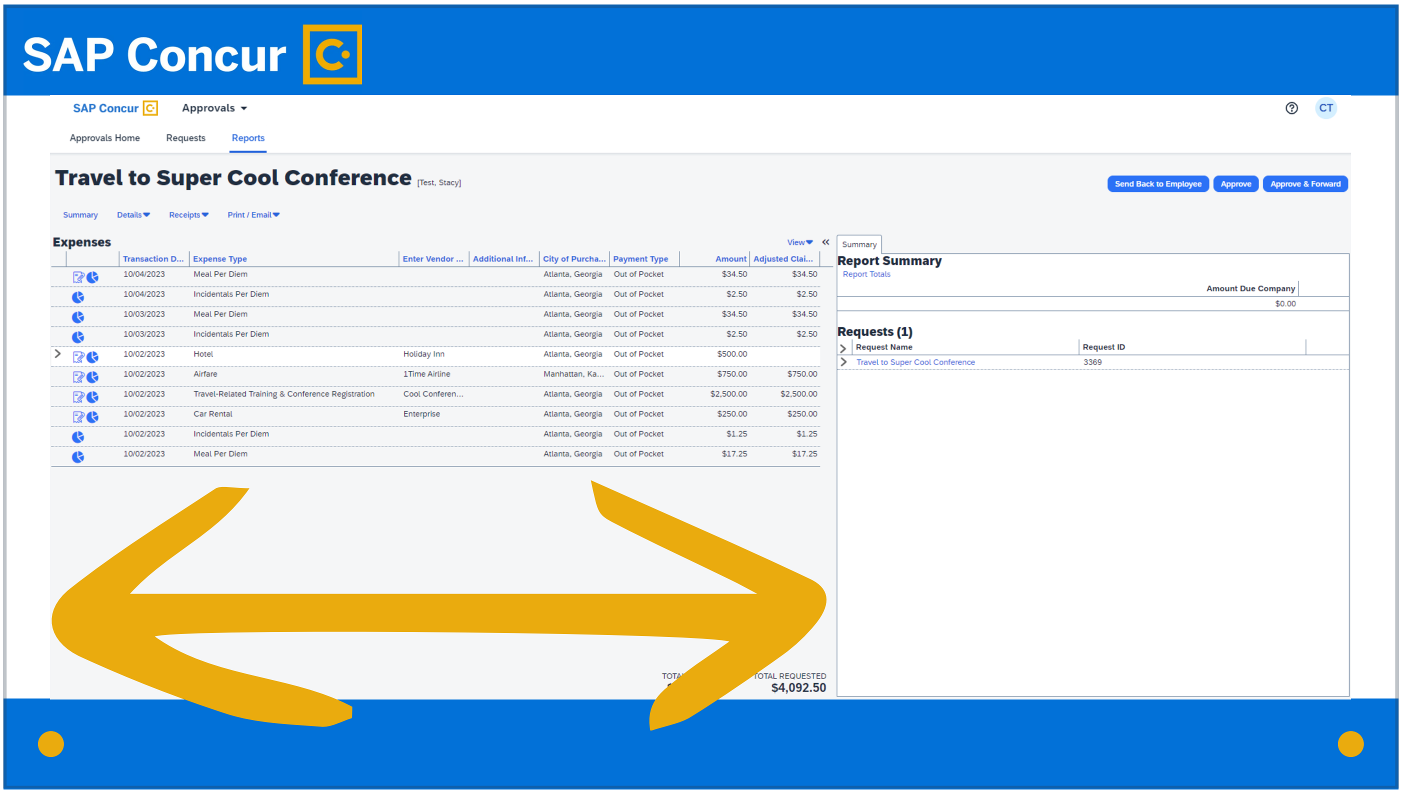
The expense details will show on the left of the screen.



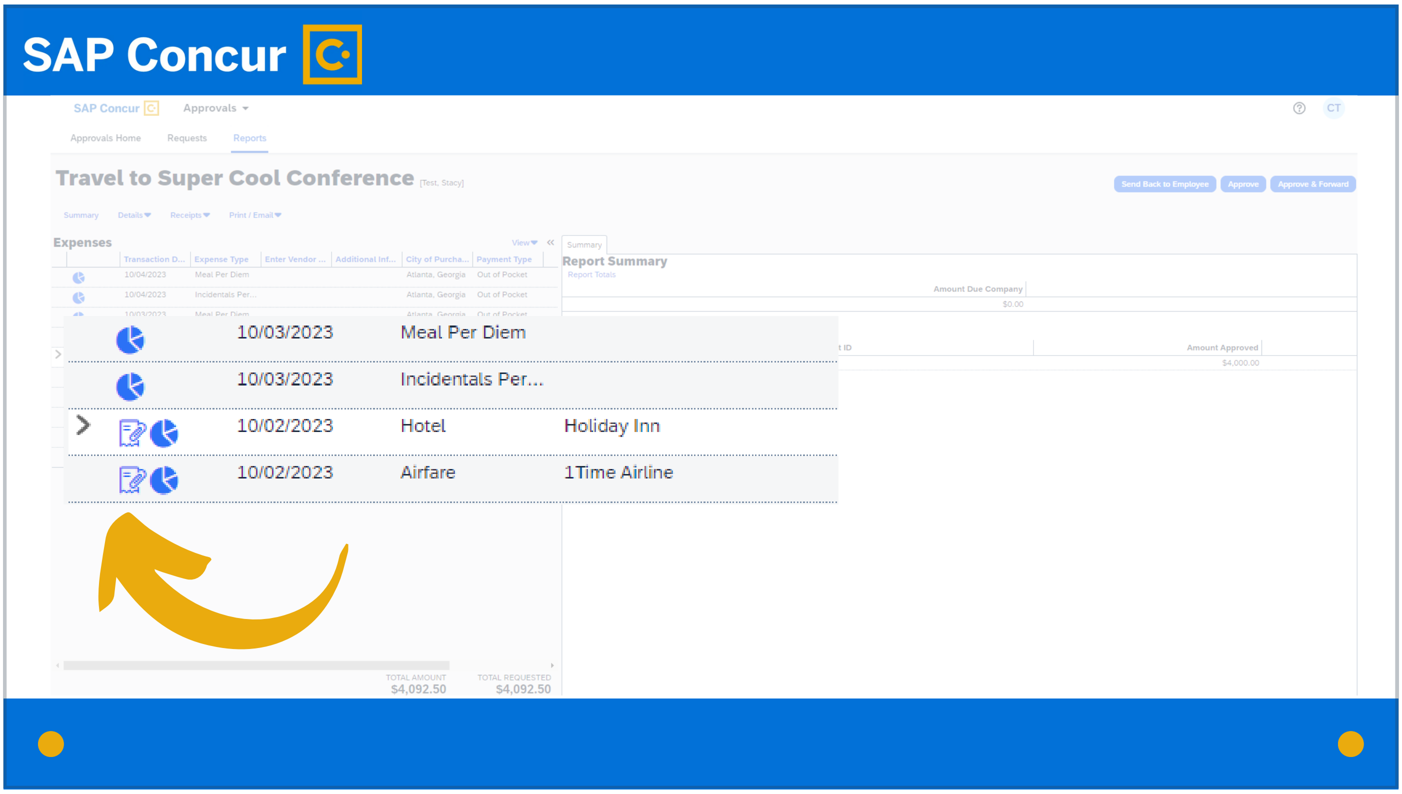
You can scroll from the bottom of the screen to view the full range of details provided.



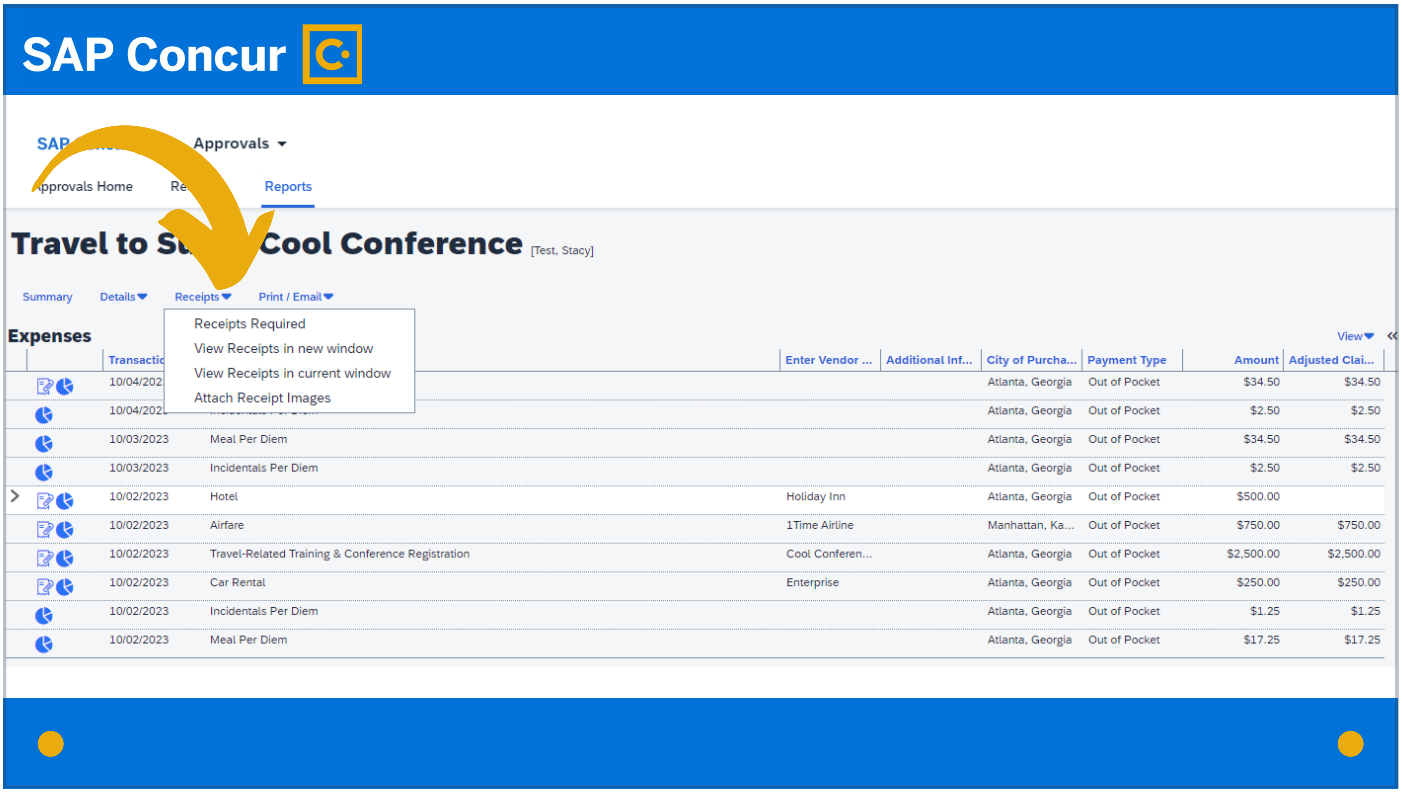
Or you can click on the line that divides the Expenses and Report Summary sides of the screen and drag the line to the right



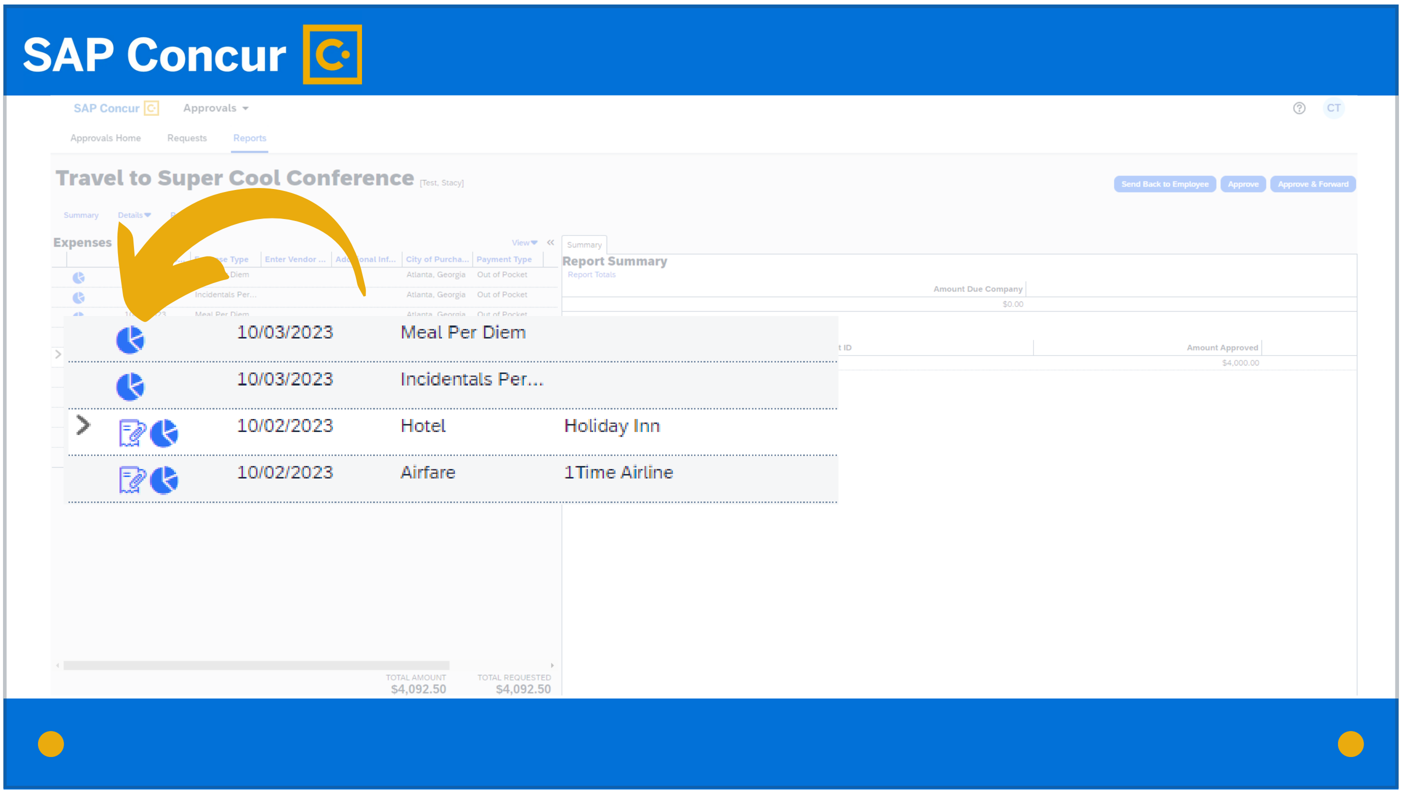
to extend the Expenses portion of the screen.



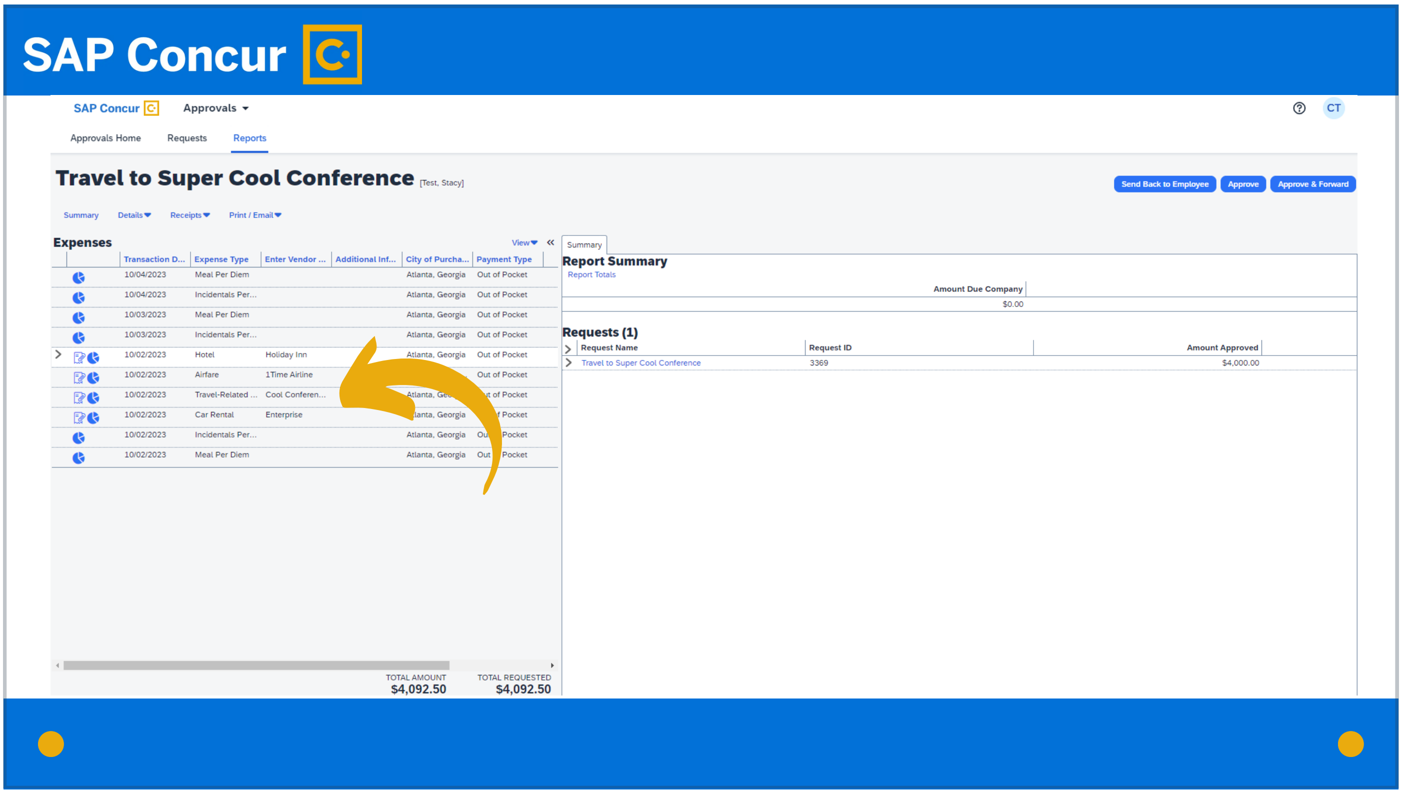
The paper/paperclip icon allows you to view documents attached to the expense, such as receipts. Hover over this icon to view the attached documents.



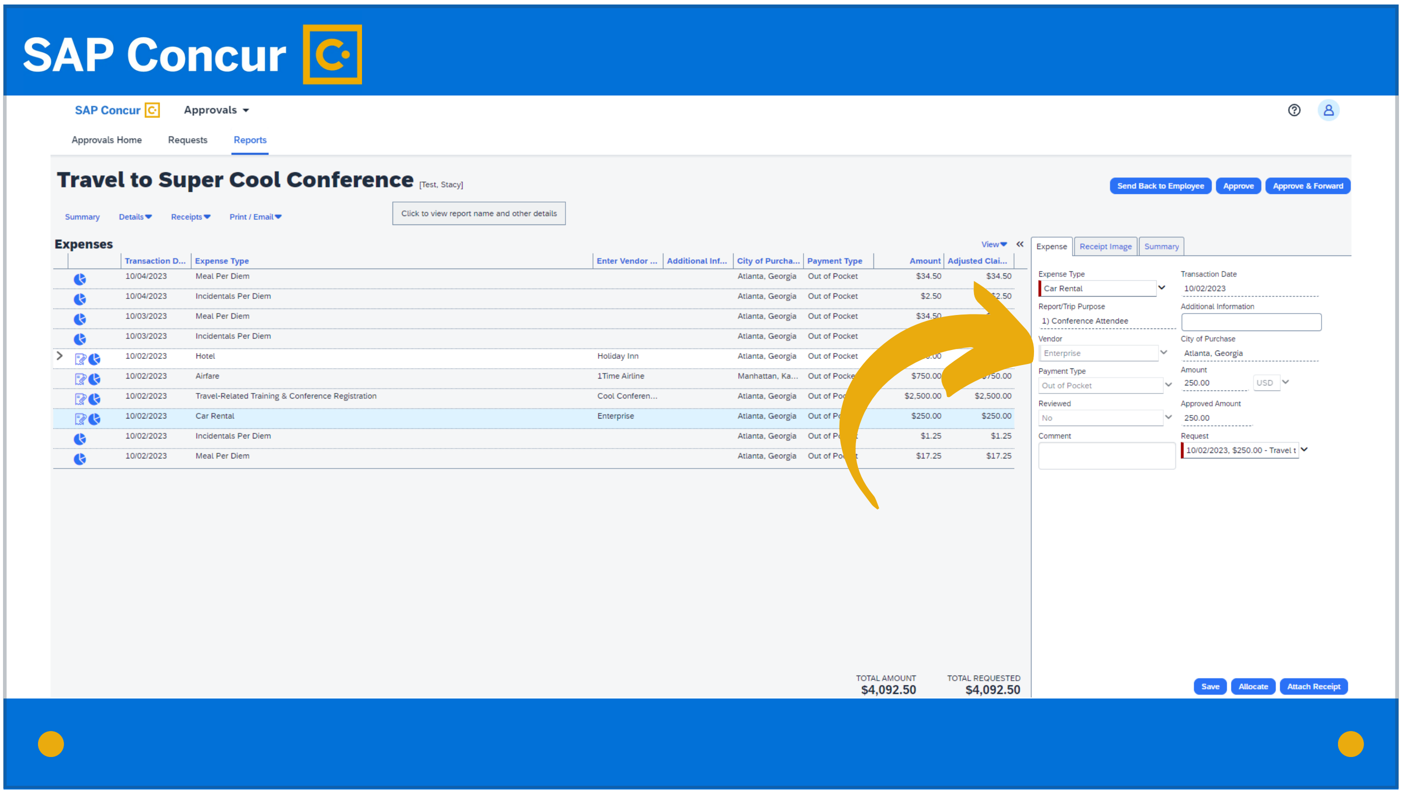
You have additional receipt viewing options available under the Receipts dropdown menu.



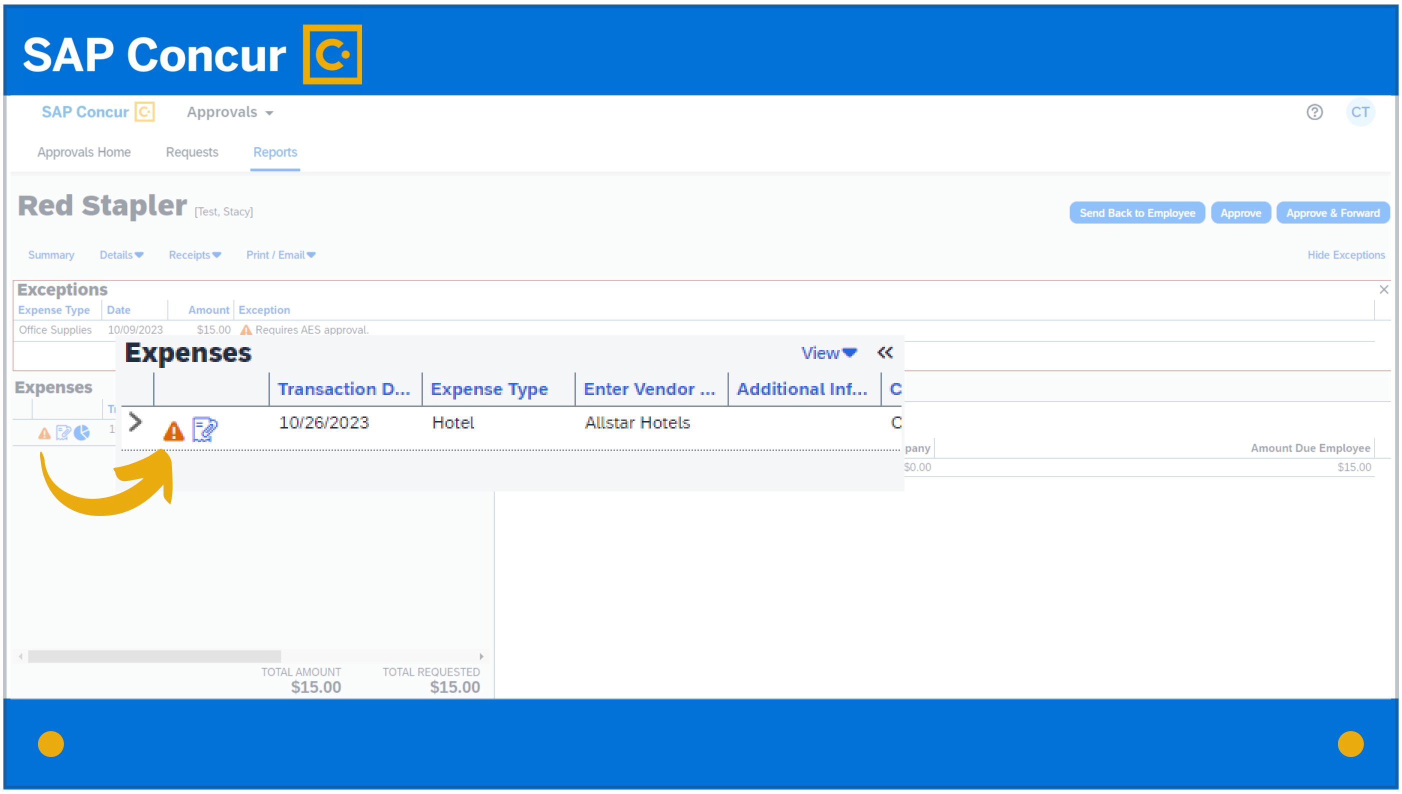
The pie chart icon indicates funding string allocations associated with the expense. Click on this icon to view the allocations.



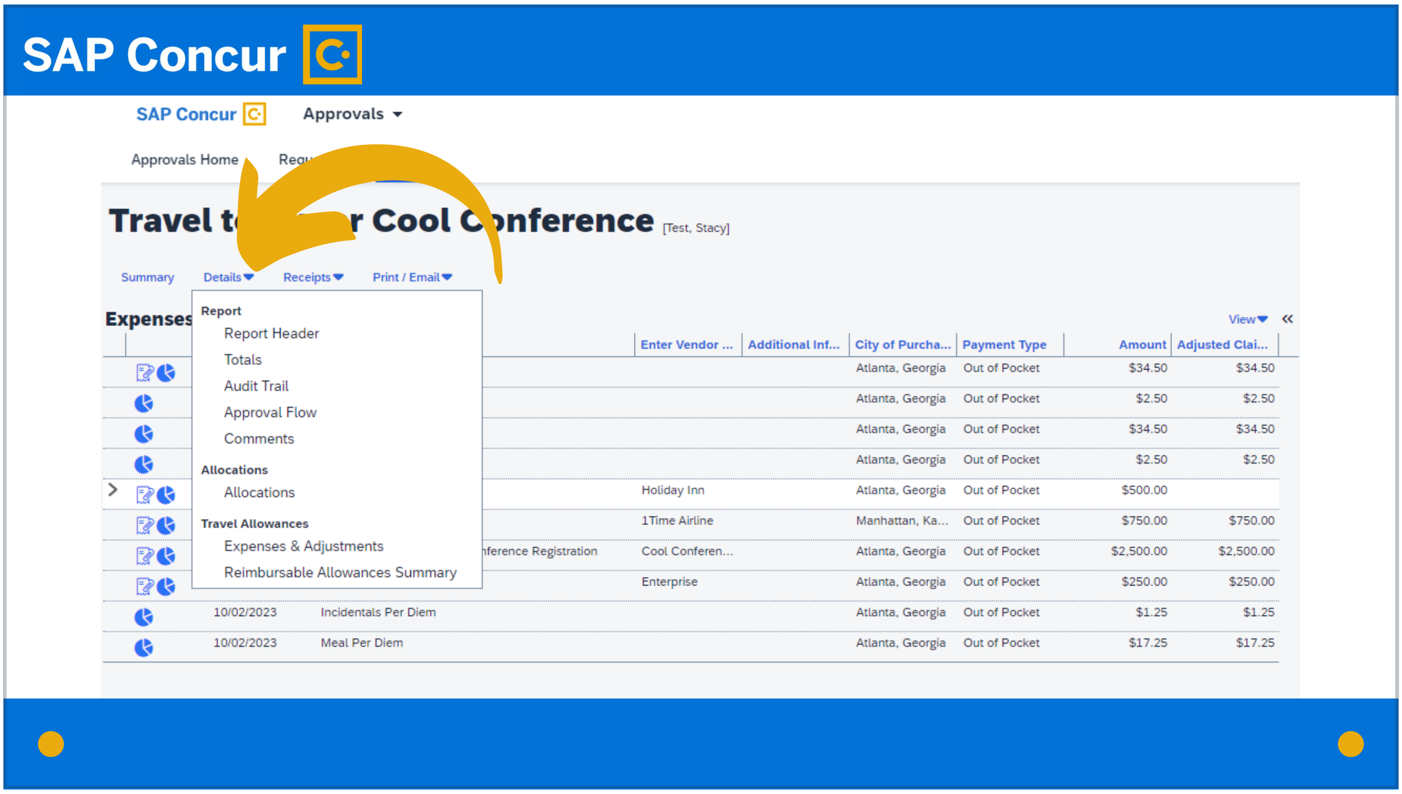
11. To view the details of any expense in the expense list, click on the line for that expense.



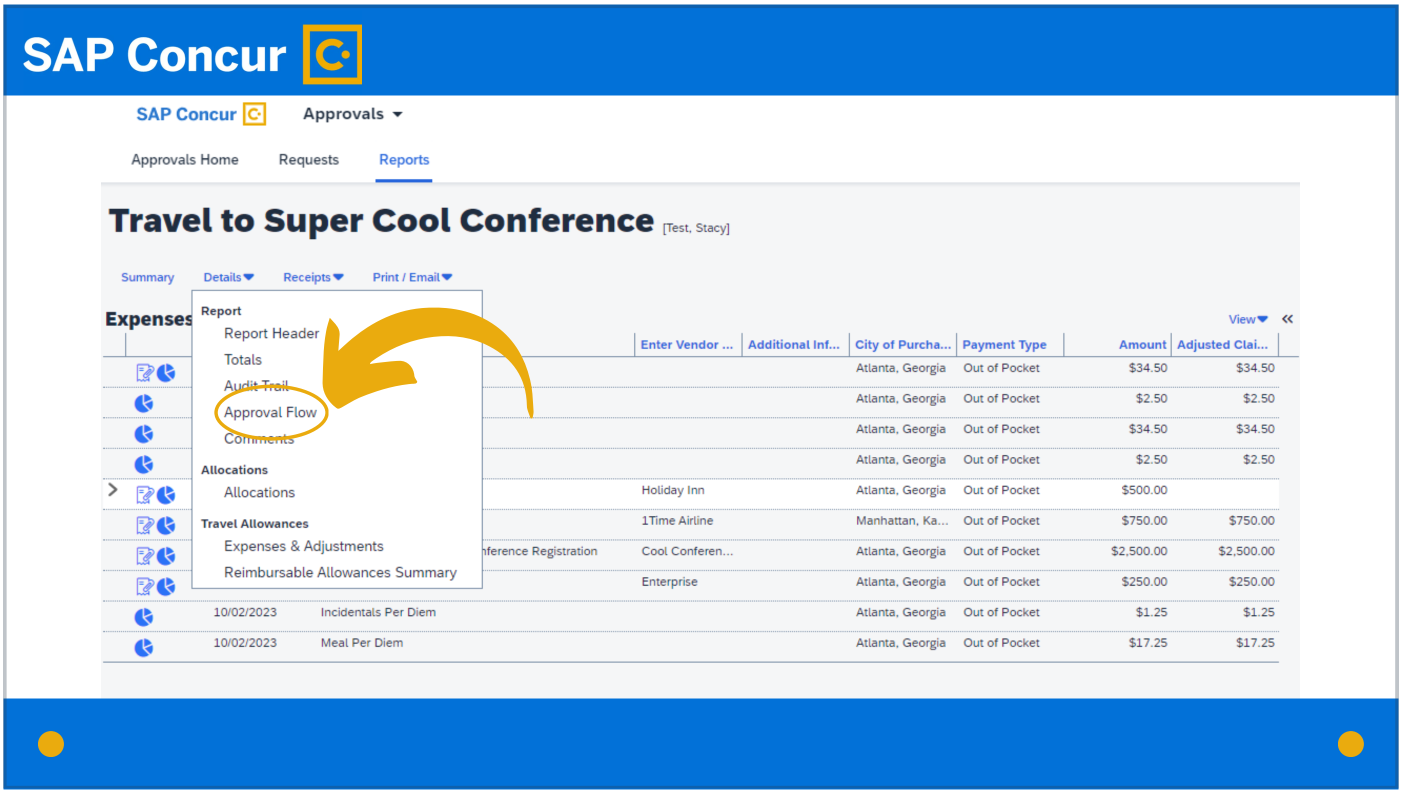
12. The expense details window will open to the right.



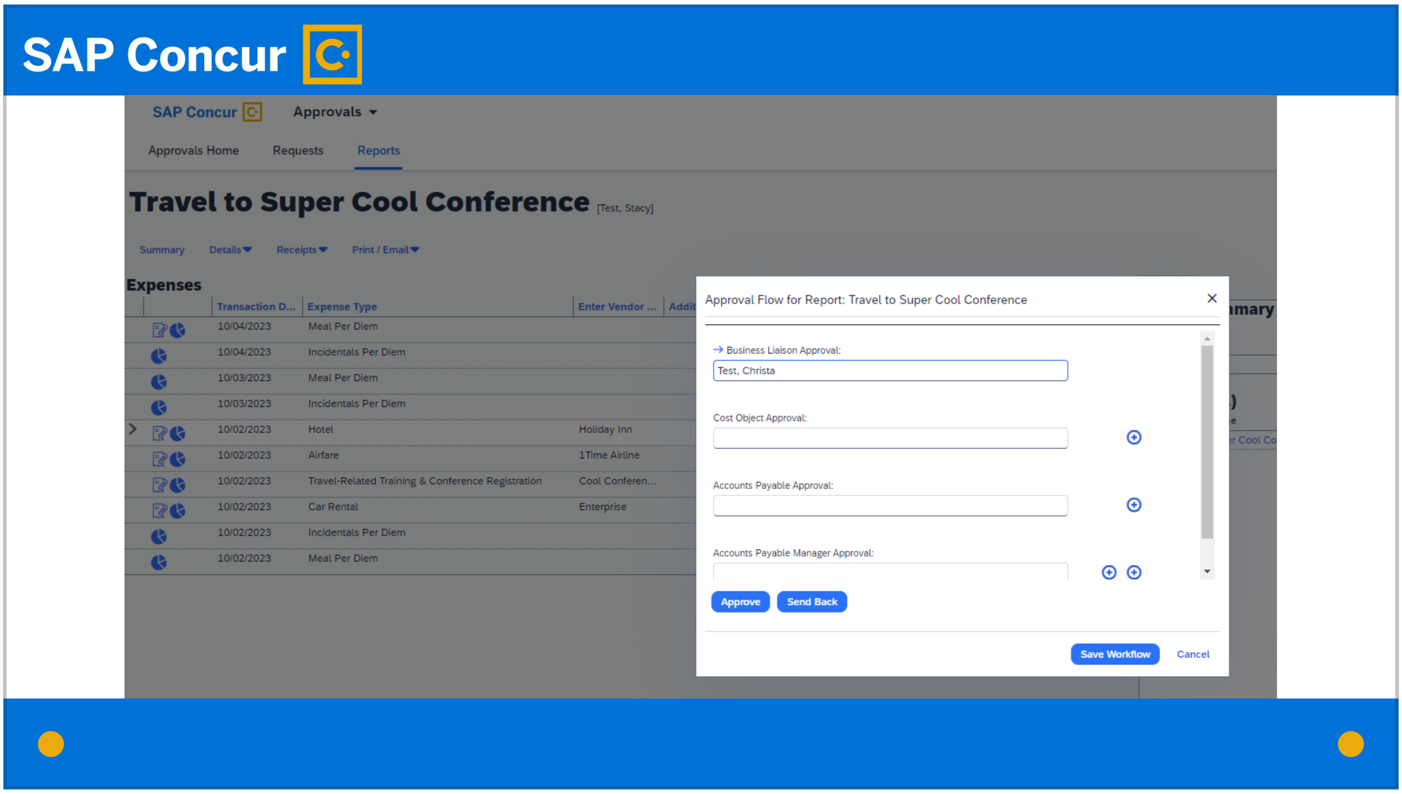
13. If any expense shows a red exclamation point icon to the left, that indicates an alert or warning associated with the expense. You can click on that icon to view the alert or warning and determine if action is necessary to resolve it.



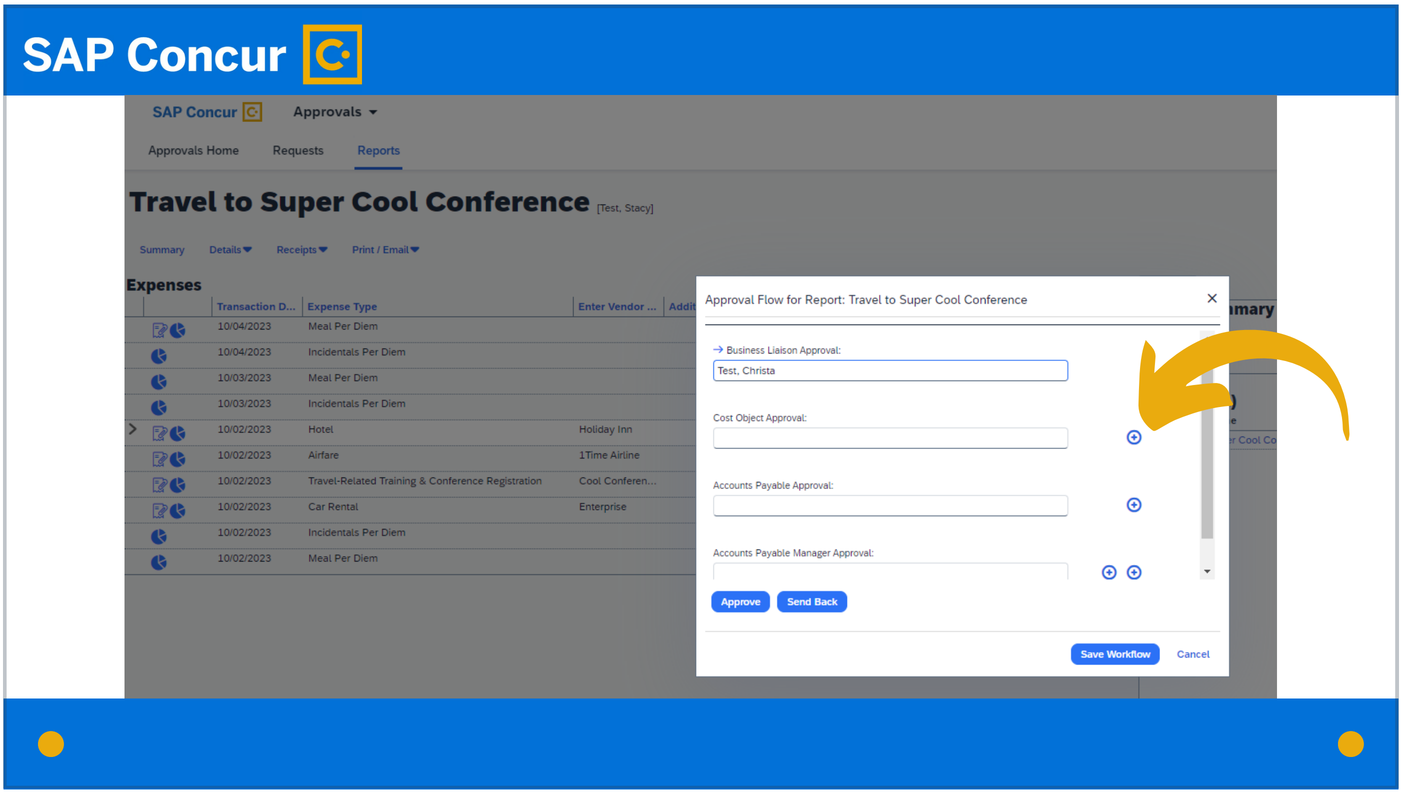
To access report details such as the report header, audit trail, comments, travel allowances, etc., click the Details dropdown menu and select the appropriate option.



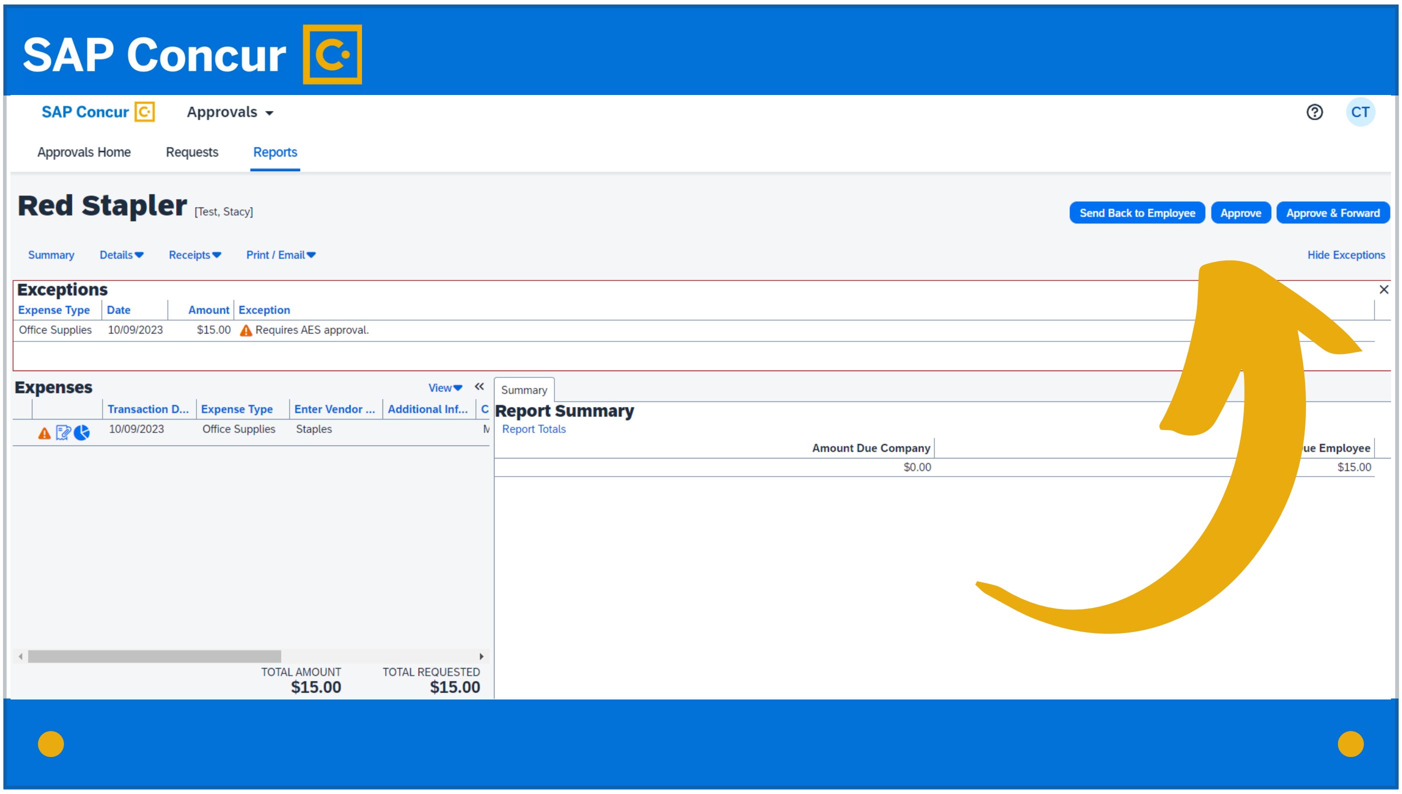
You can also select Approval Flow from this menu



to view the report workflow information



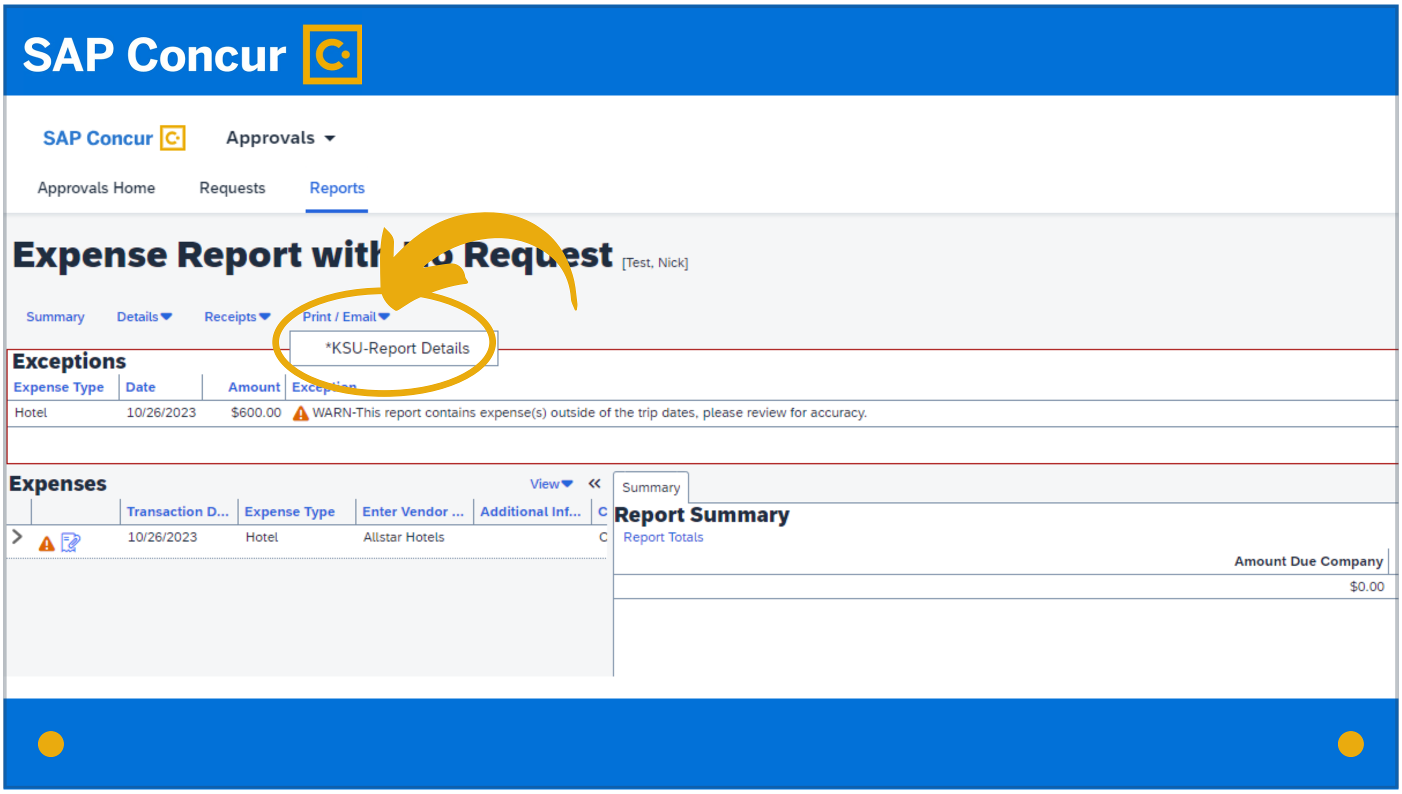
17. It is possible from this screen to add an approver to the workflow if necessary. For details on this process, please refer to our training video on adding approvers to the workflow.



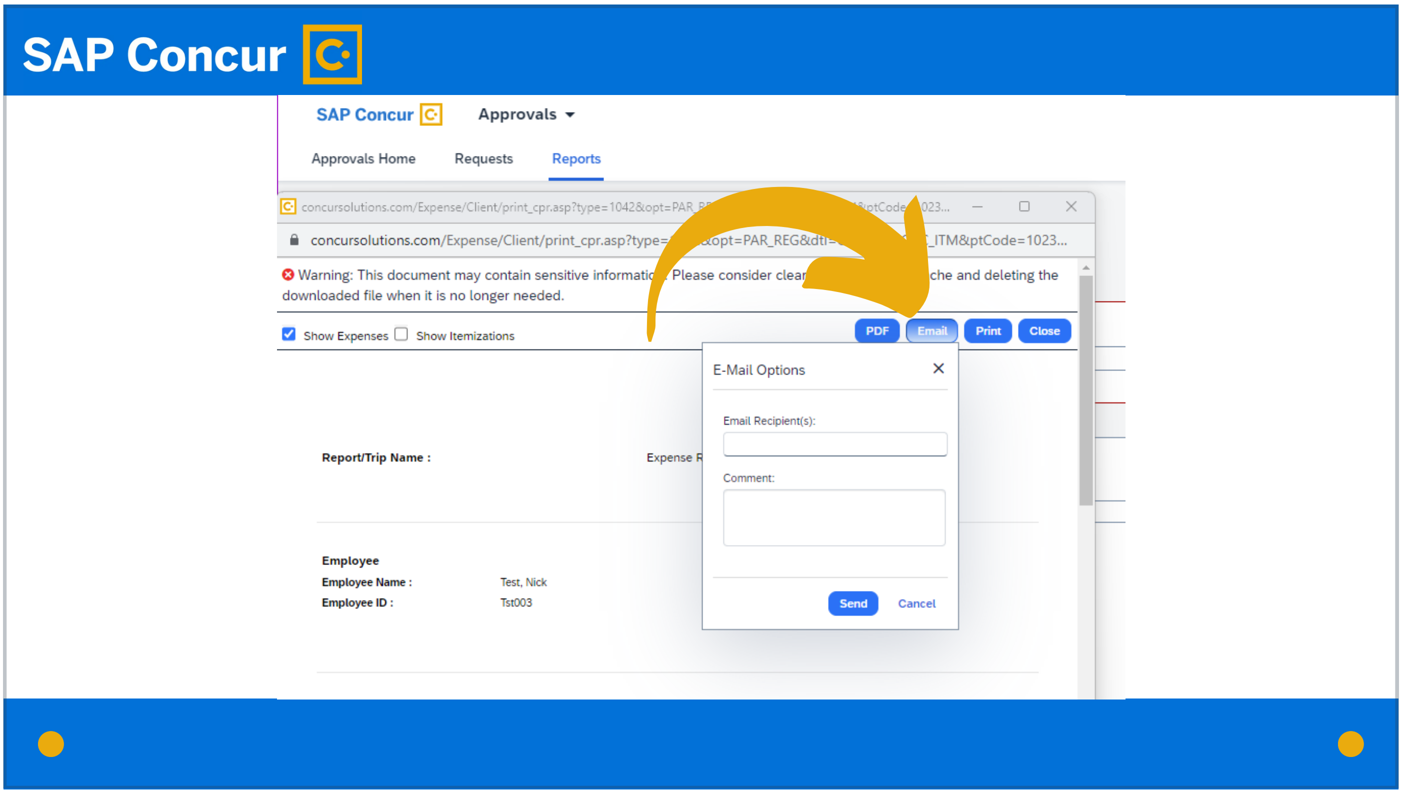
Once you have reviewed all aspects of the report, you have the options to approve it or send it back to the employee.

19. Important!

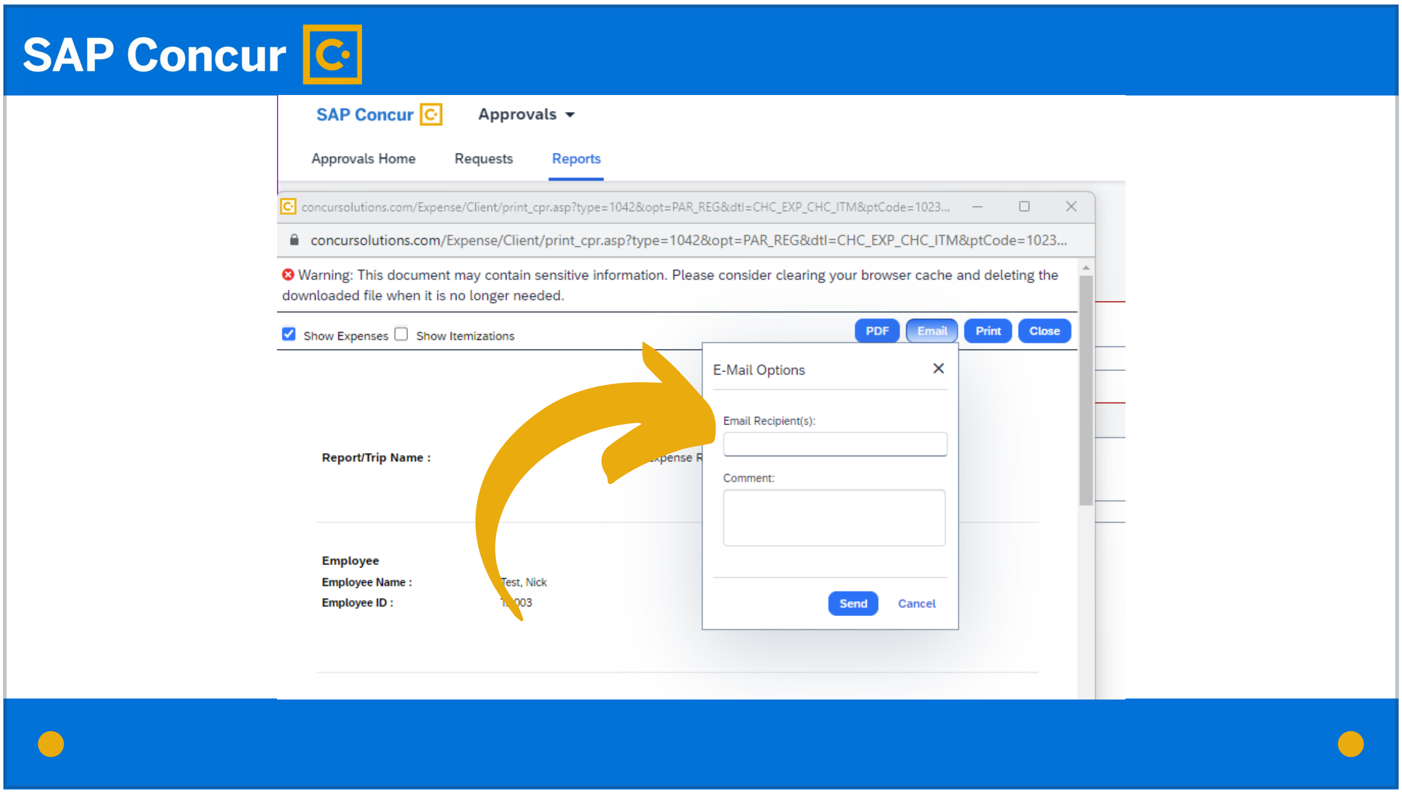
20. If the reason you cannot approve the report is that required documentation or a clarifying comment is needed, it is better to email the employee to ask them to attach that documentation or add that comment. Documentation and comments can be added to a report at any time, but sending the report back to the employee causes the entire approval process to start over.



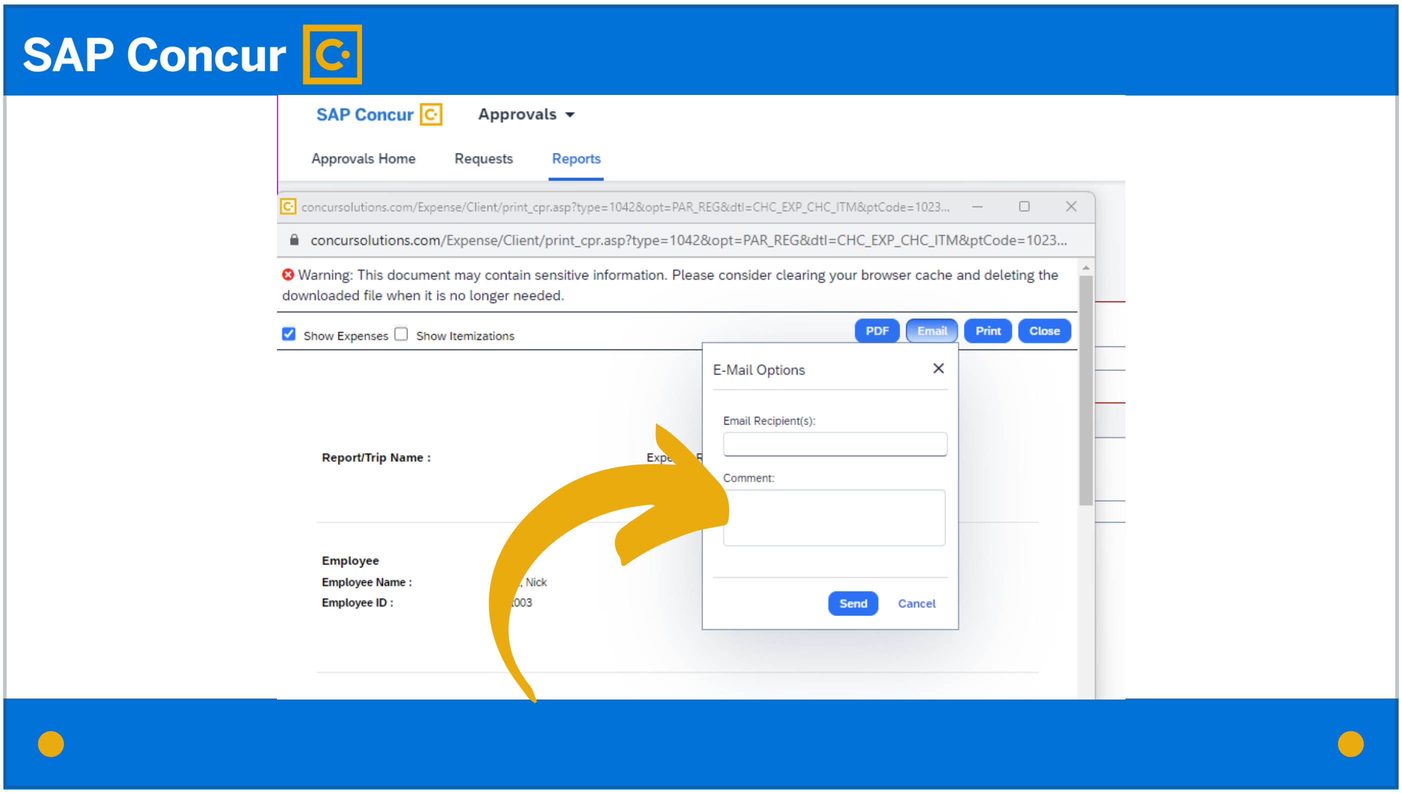
21. To email the employee to request the documentation or comment, click on the Print/Email link dropdown menu and select KSU Report Details.



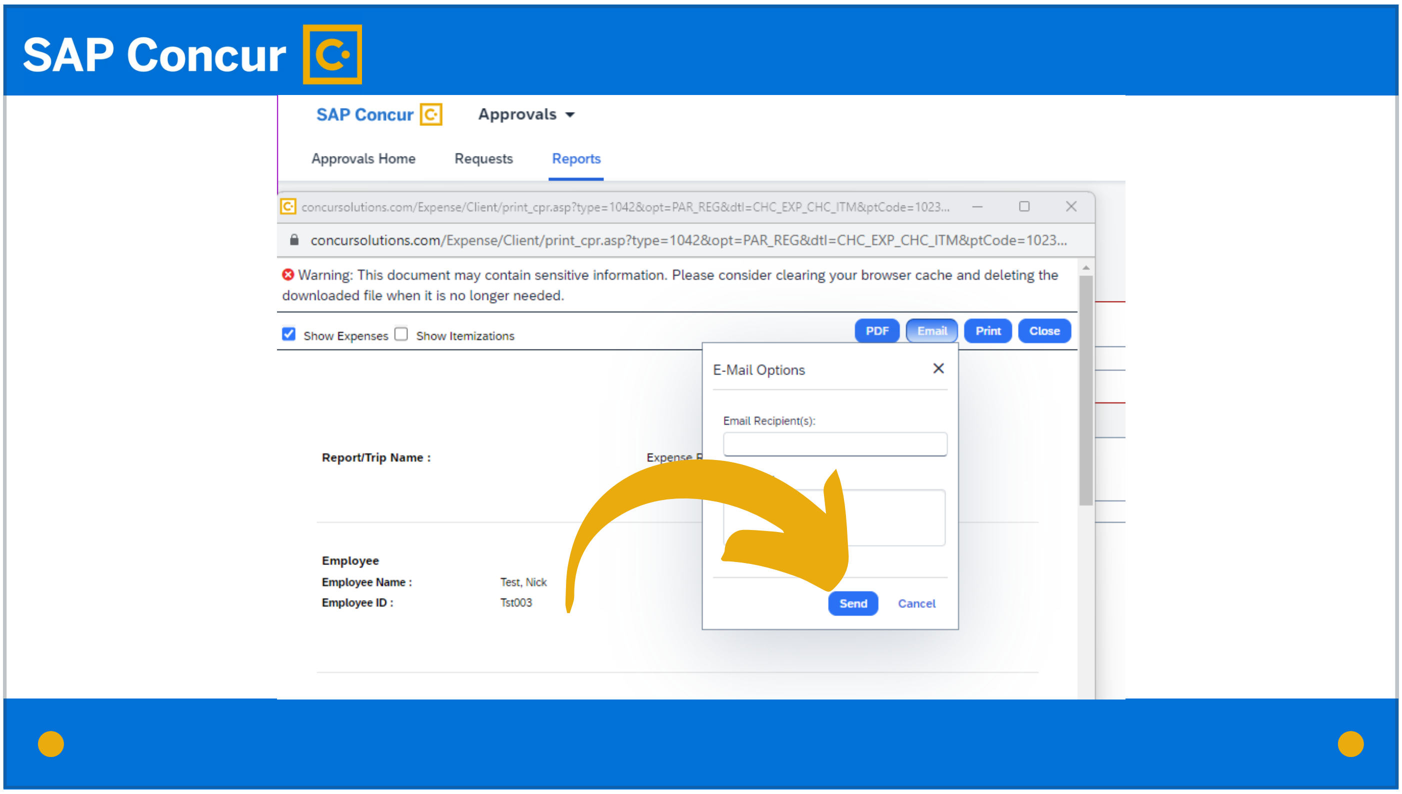
On the report window that opens, click the Email button near the top right of the window



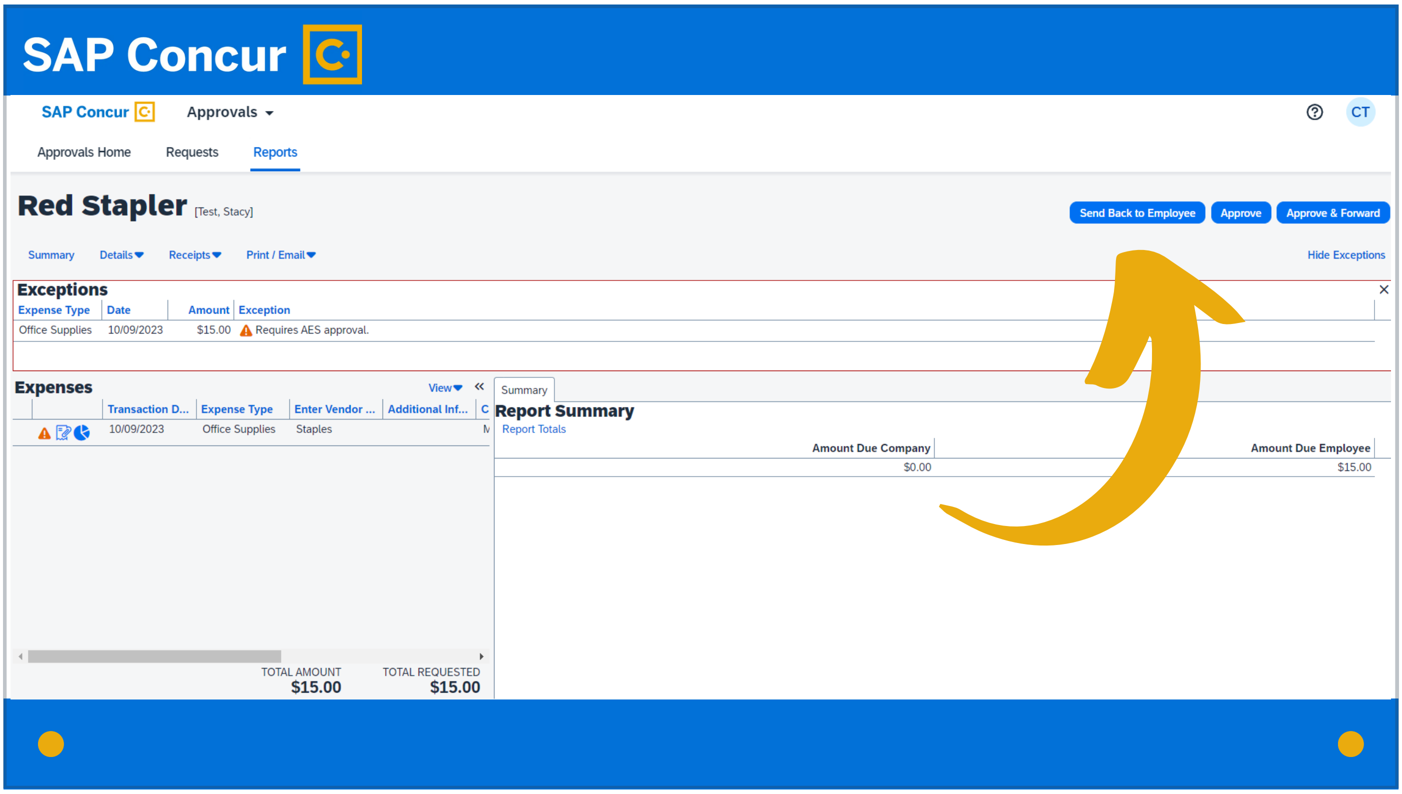
enter the employee’s email



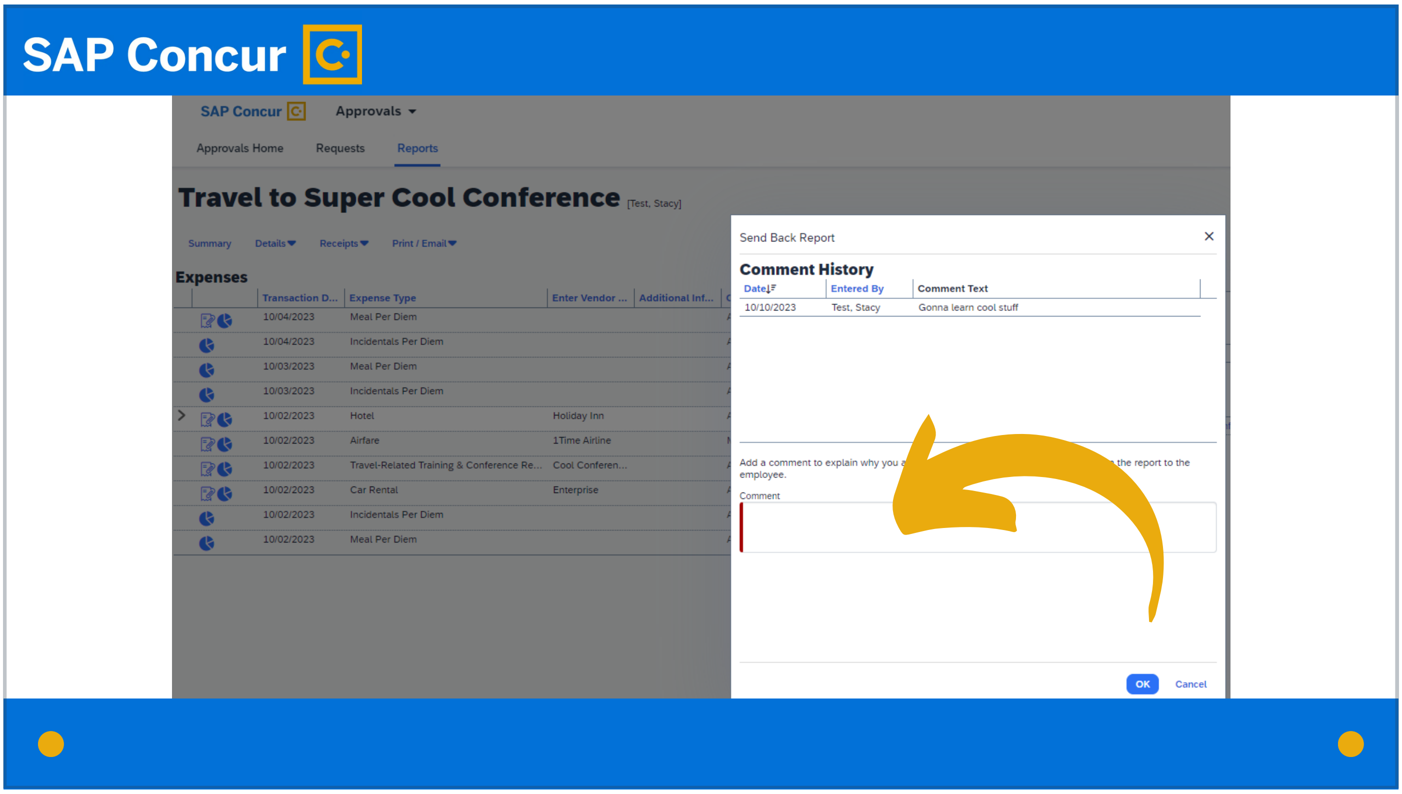
and add a comment to explain what needs to be appended.



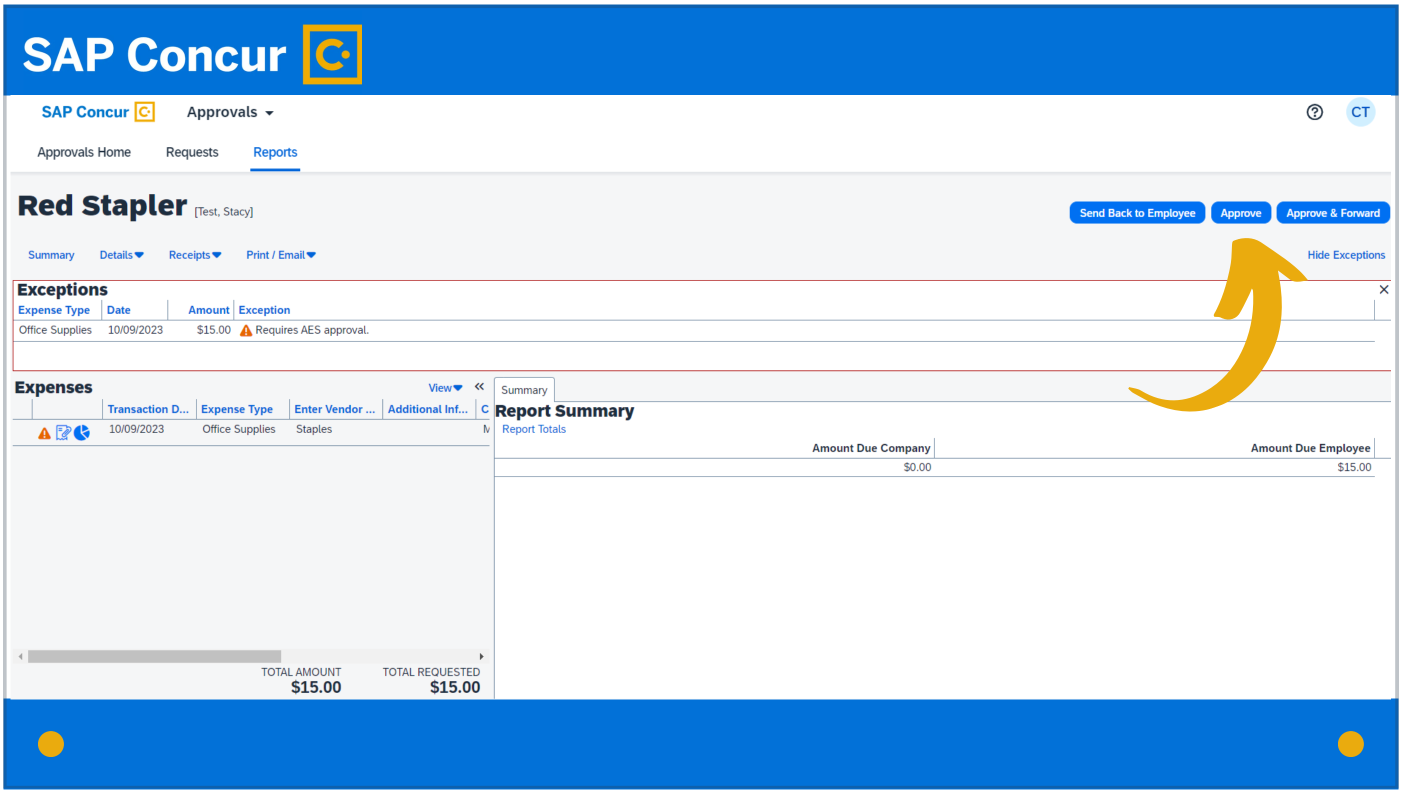
25. Then click send.



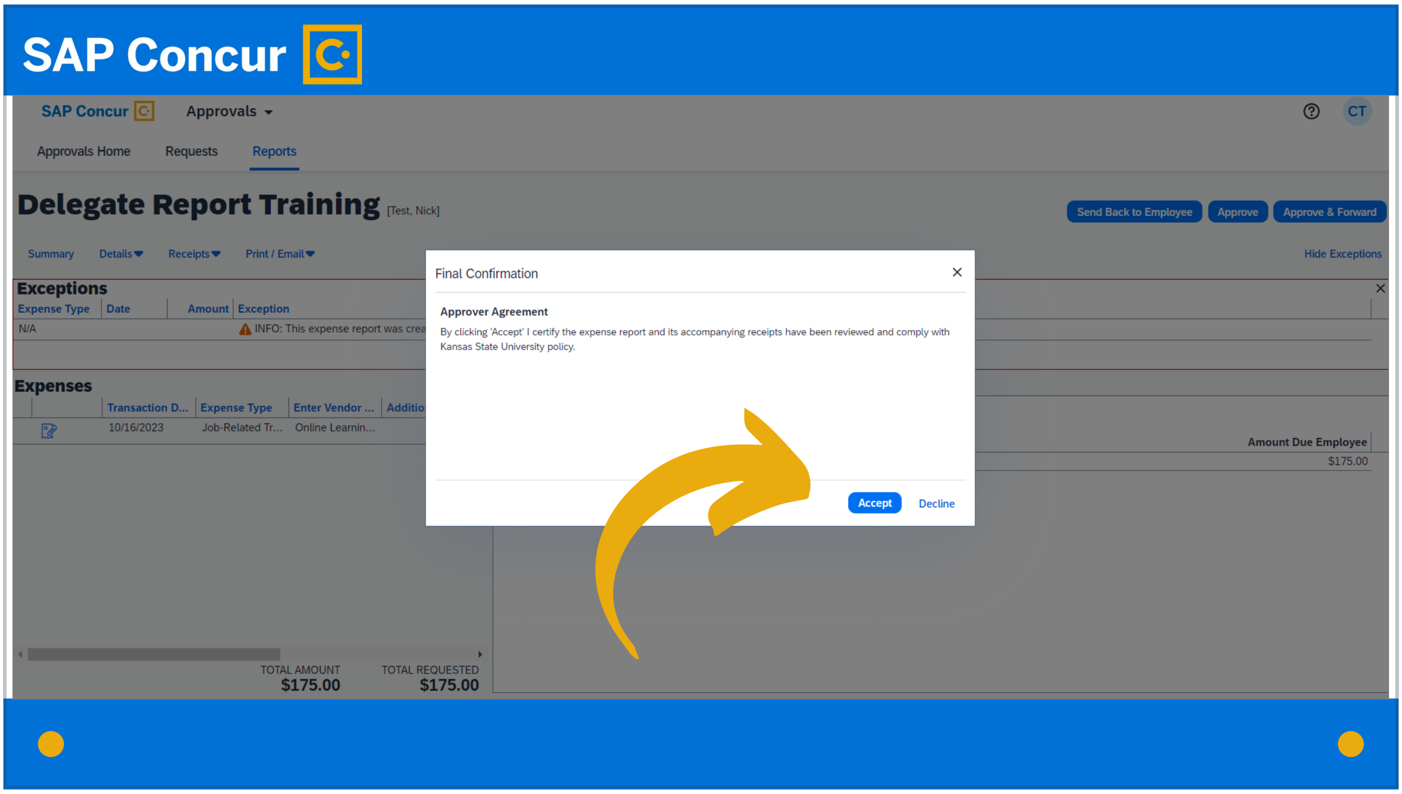
26. If something other than missing documentation or comment clarification is the reason the report cannot be approved and it is necessary for the report to be sent back to the employee, click the Send Back button.



27. In the comment box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.



If the report is good to be approved, click the Approve button.



Read the Approver Agreement that comes up to make certain you agree to it. As long as you do agree, click the Accept button. Your part in the approval process is now complete.