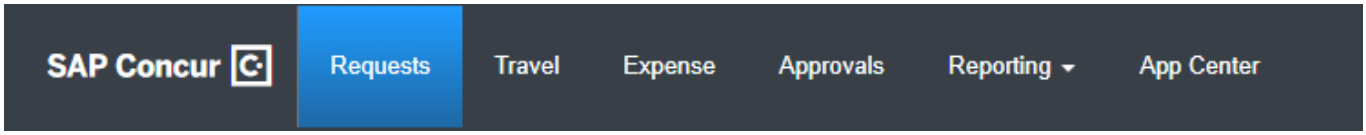
Request: Approver



LEARN BY DOING

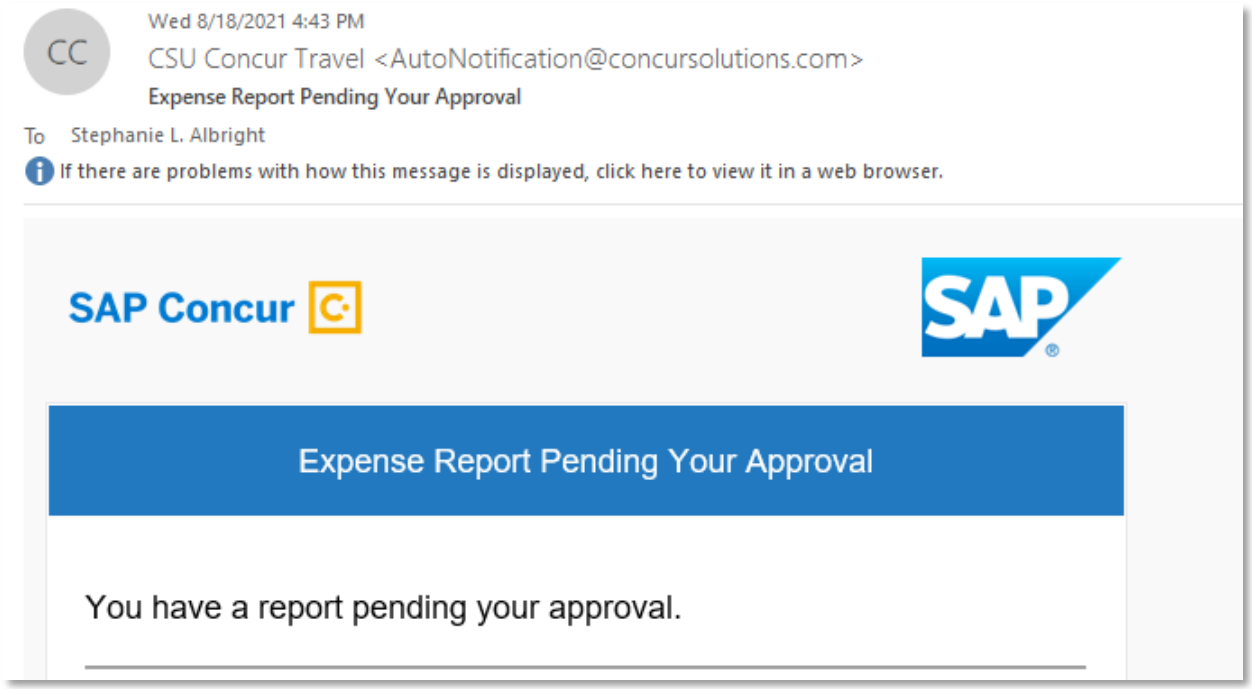
CAL POLY

Strategic Business Services

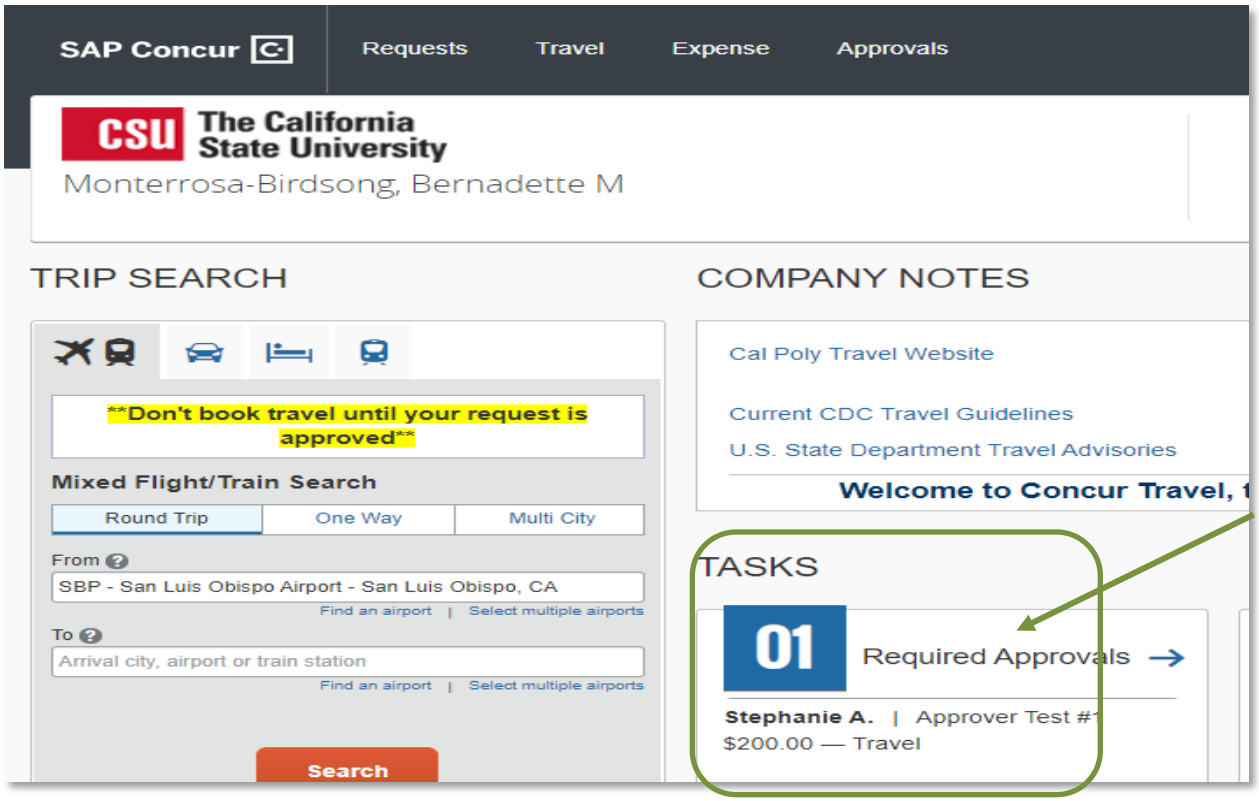
ADMINISTRATION & FINANCE

Approving a Concur Travel Request

Approvers will receive an email from AutoNotification@concursolutions.com when there is a Concur Request or Expense Report requiring approval. You can click the link in the email to open Concur or access Concur from your Cal Poly Portal page.

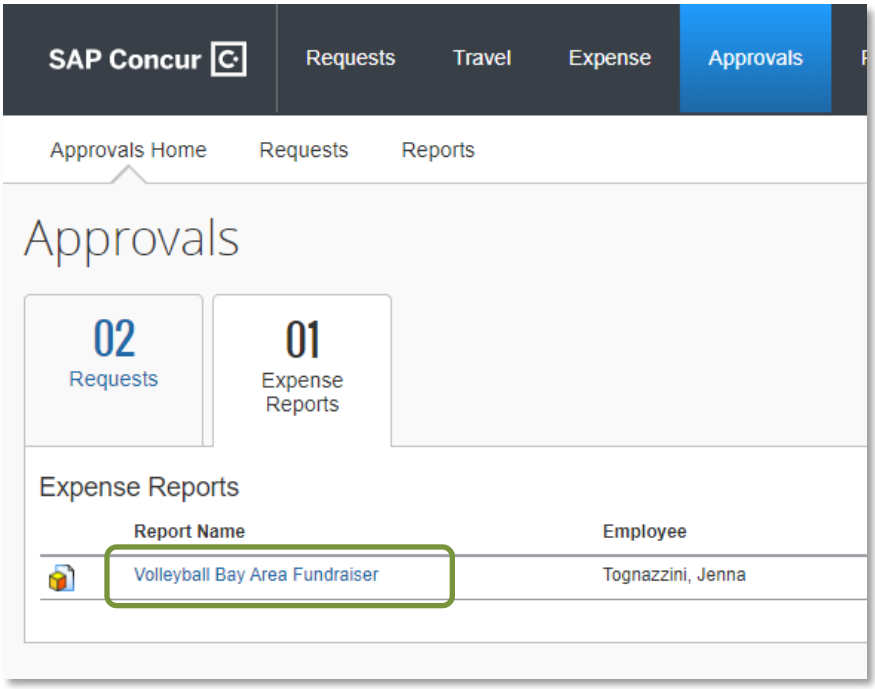


In Concur, the Requests or Reports to approve will show under Tasks/Required Approvals



Click Required Approvals to open the list of Requests or Expense Reports to approve.

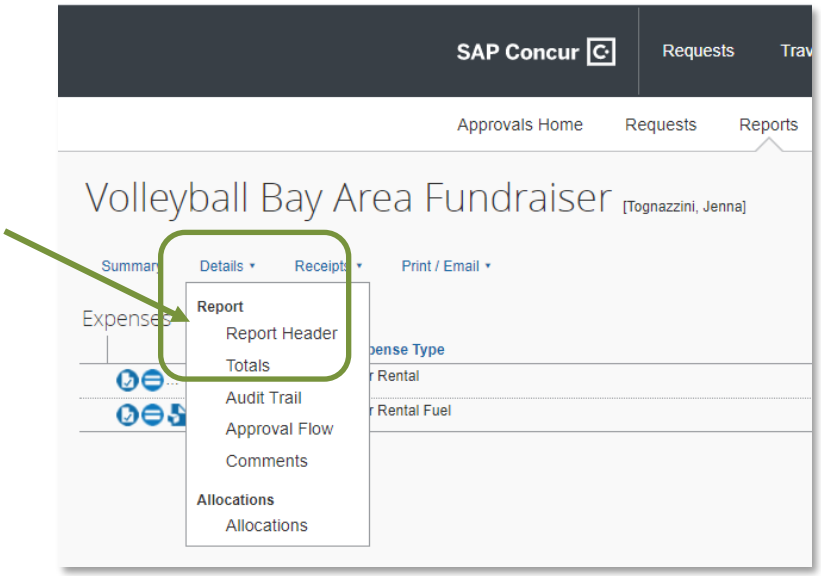
The Approvals Page will show how many Requests and Expense Reports you have to approve. Click the Name of the trip (in blue lettering) to open the Expense Report to open.



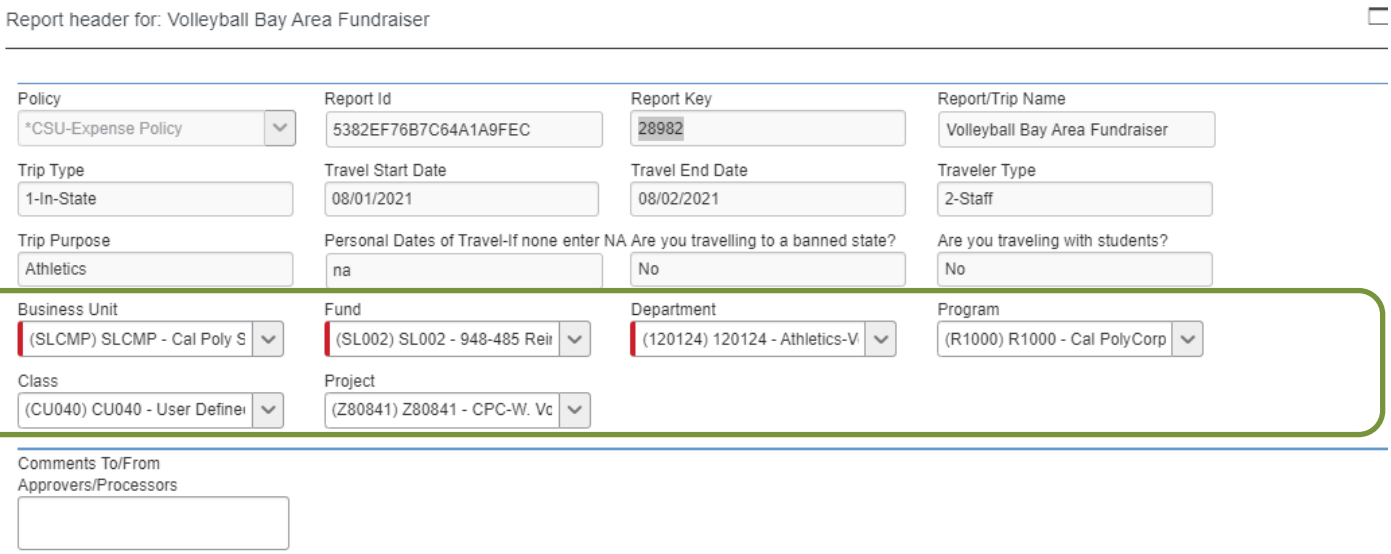
You can now review and approve the Expense Report

Budget Approvers:

1. You will want to review the traveler information and the chartfield string.
    a. To review the traveler information, click **Details/Report Header**

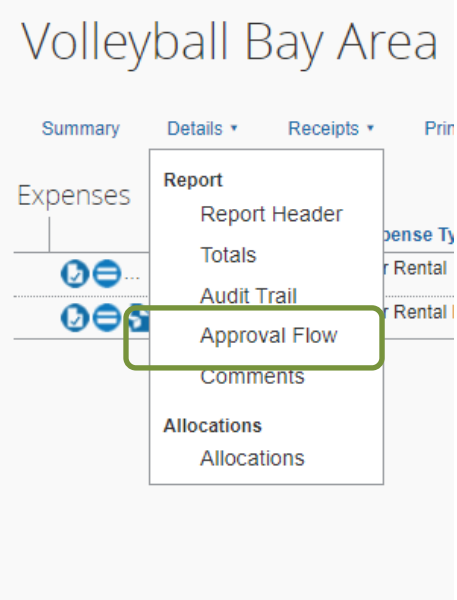


2. Review the travel information and the chartfield string. Approvers can update the chartfield string on a travelers Request until it is fully approved.

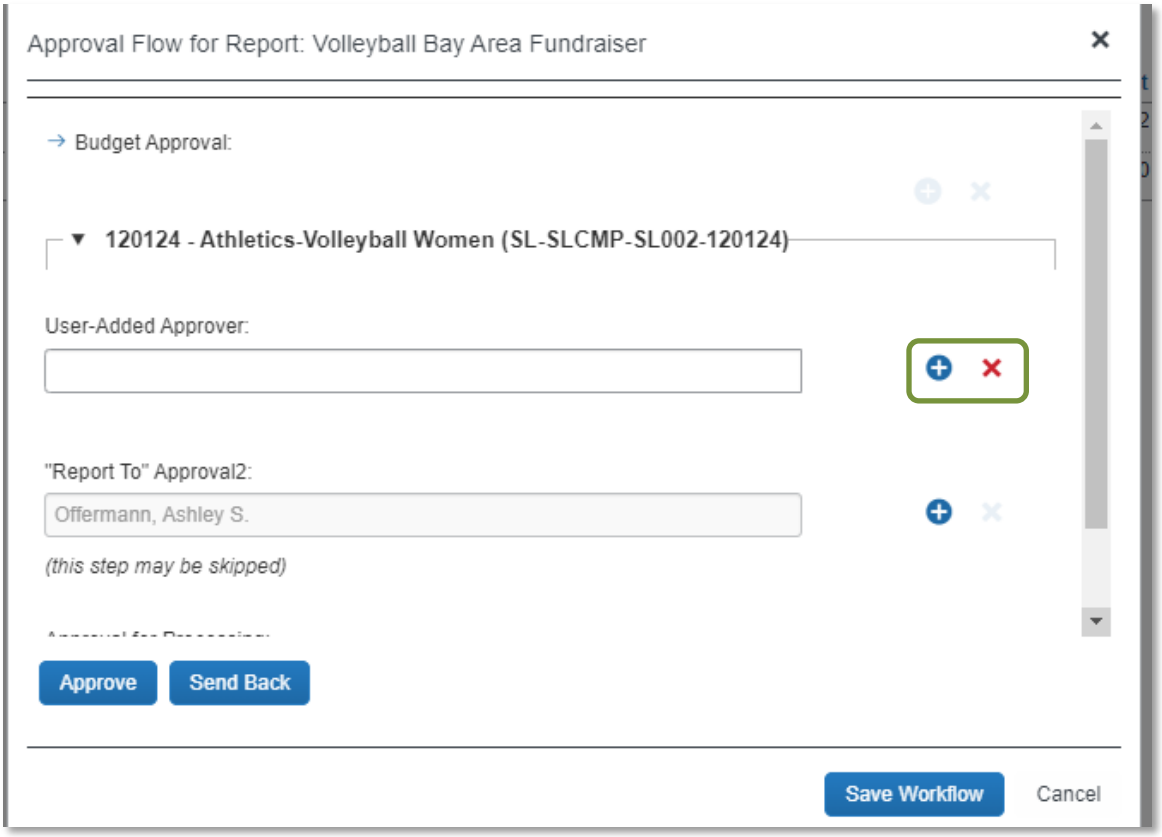


Once reviewed and any changes are made to the chartfield string, click **SAVE**

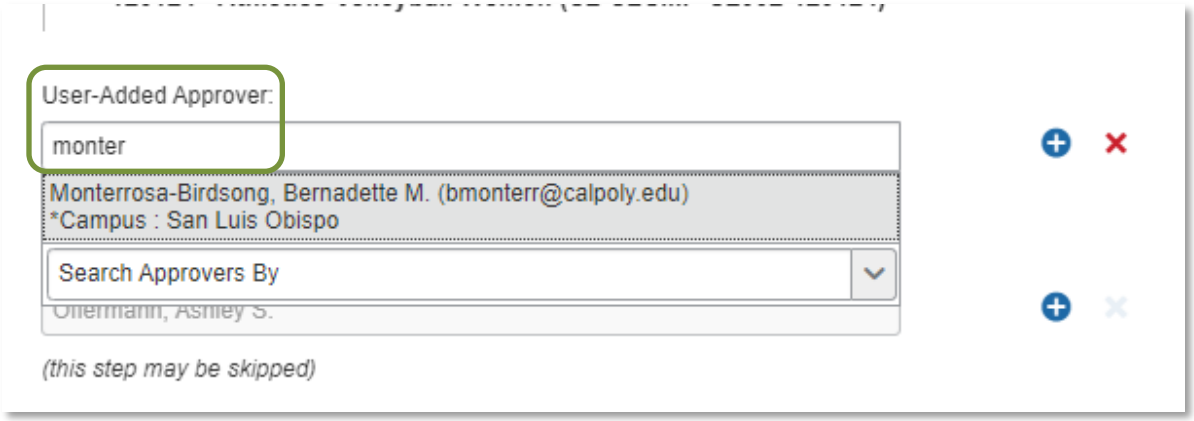
3. You will be back on the main page of the Request. Next check the approval flow under **Details/Approval Flow**



5. The **Request Timeline** will open and show the approval flow for the Request. You can add additional approvers using **PLUS (+) Tab**

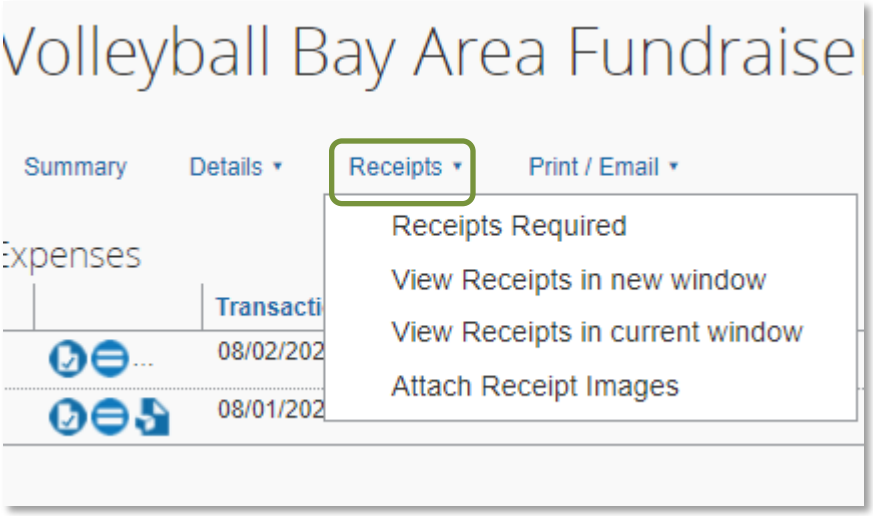


6. Click + to edit approval flow. You can add at any step in the process and you can add as many *approvers as you would like.
*Approvers must be a Concur budget or manager approver to be available as a Concur approver.



7. To add, click +Add Step then start to type in the LAST NAME of the approver you wish to add. When the name comes up, click on the name to add. Do not just hit enter as it will clear the field instead of add the name. Then click SAVE Workflow

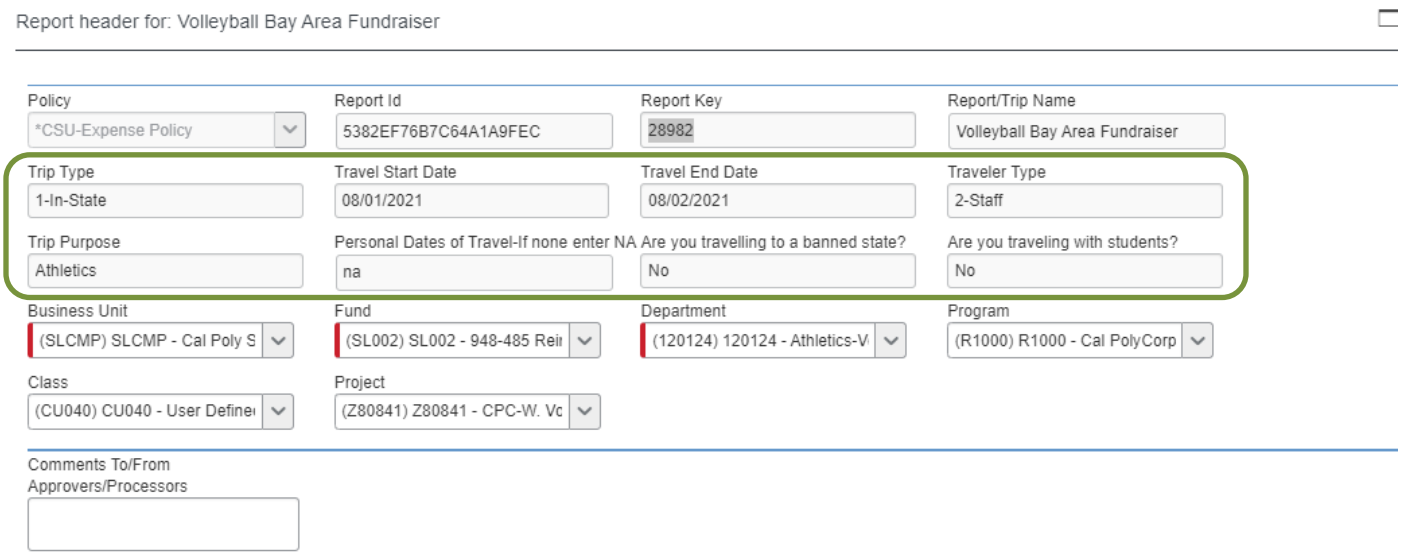
8. You can also review any attached documents



9. Once reviewed, you can **APPROVE** the Request to move it to the next approver.

Manager/Supervisor Approvers:

1. You will want to review the traveler information, travel dates, and Trip Purpose on the Request Header.



2. Follow Steps 3-8 above to review approvers and view Comments and Attached Documents.

3. Once review and approved, click APPROVE to complete