REVIEWING & APPROVING REQUESTS IN CONCUR MOBILE APP USER GUIDE

LEARN BY DOING

CAL POLY

Strategic Business Services

ADMINISTRATION & FINANCE

This guide will show approvers how to review and approve and/ or approve and forward Requests. Please make sure to read through the entire document.

Approver timing:

Approver has the following time to approve. After that time, it moves to the next in-line manager for their approval. They will then have the following time to approve and then it will move up and continue to go up the chain to the President; therefore, it is important to approve in a timely manner.

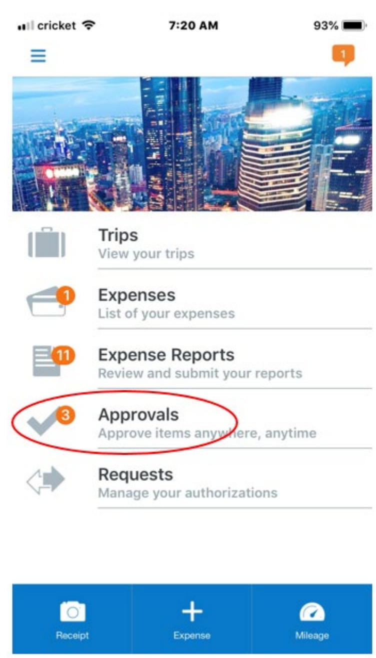
	Cost Object Approver (budget approver)		**HR Manager**	
Type of Approval	**Time in Queue**	**No action from approver, the system will**	**Time in Queue**	**No action from approver, the system will**
Request	6 days	Automatically approve and it moves to HR manager	6 days	Automatically move to the next in-line manager
Expense	10 days	Automatically approve and it moves to HR manager	10 days	Automatically move to the next in-line manager

Approval flow:

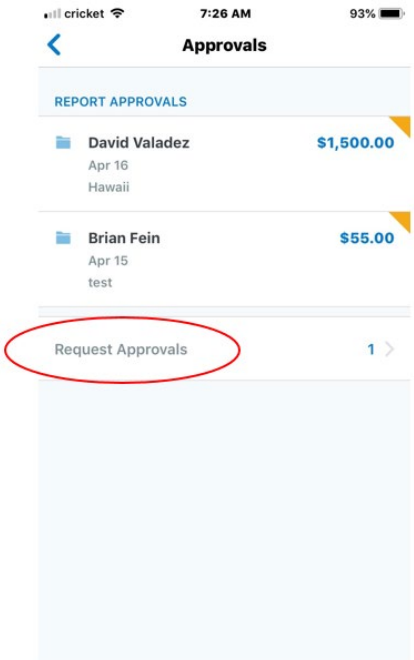
To Review and Approve in mobile app:

Once your direct report submits a Request or Expense Report you will receive an email.

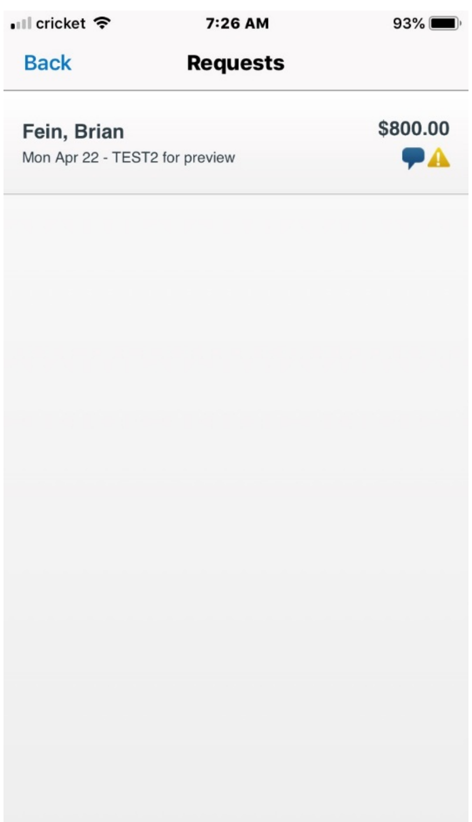
1. Open the mobile app (see Mobile App Guide on how to download and login to app).
2. Click on Approvals to see all **Requests** and **Expense Reports** submitted for your approval.



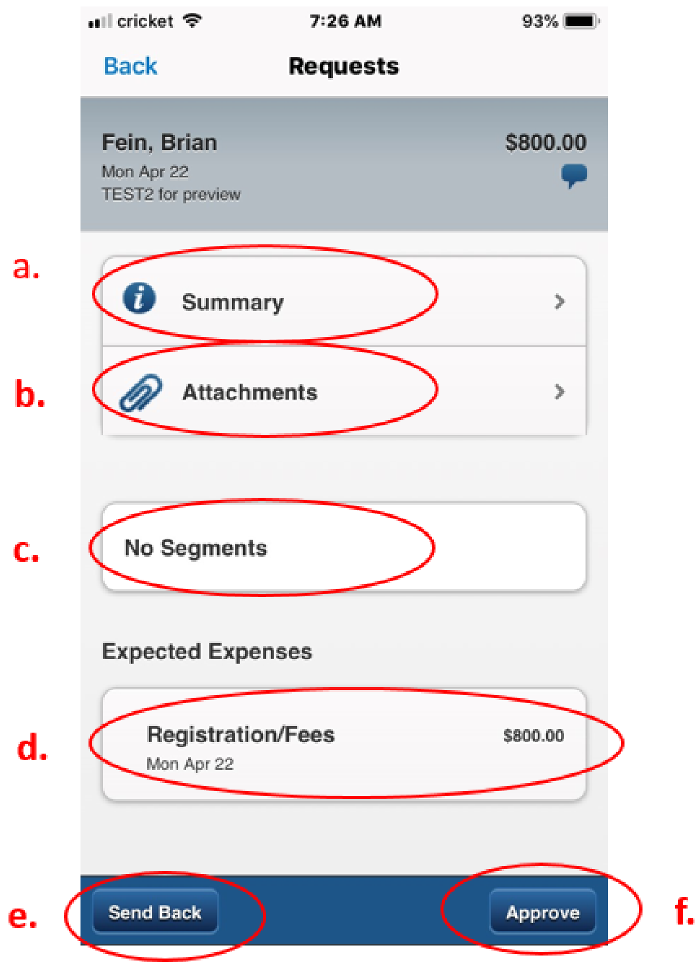
3. Click on **Request Approvals.**



4. List of **Requests** that need approval will appear.
5. Click on the **Request** you would like to review.

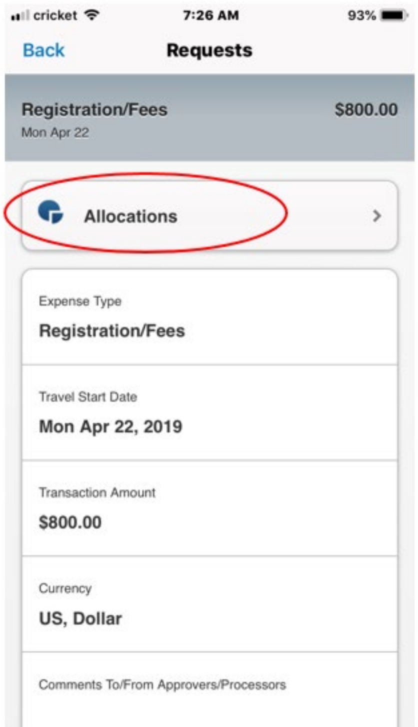


6. Click on the following:

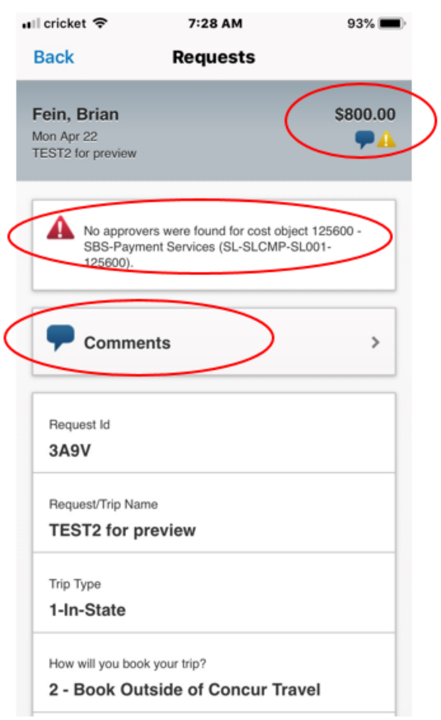


7.
   a. **Summary** to review general trip information and **comments**
   b. **Attachments** to review any attachment (this only appears if there is an attachment)
   c. **Segments** to review air, hotel, and/or car expense
   d. **Expected Expenses**, click on each individual expense to review details
   e. **Send Back** to send back to user for more information or not approve
   f. **Approve** to approve the **Request**
      NOTE: **Approve and Forward** is not an option in the mobile app (only online)

8. In detailed expense type, you can click on **Allocations**, to see if additional or other chartfield strings have been allocated to that expense type (other than what appears in **Summary**)



9. In **Summary**, you will be able to review any **Alerts** and **Comments.** tab. Click on **Comments** to see comments for trip **Request**.



Questions? Contact the Poly Travel office at PolyTravel@calpoly.edu or 805-756-2232