

Concur Expense and Request for Approvers

The Concur Travel & Expense system will alert you via email that there is something pending your approval. It may be a Request for preapproval, an Expense Report for reimbursement, or a Cash Advance. Please note that the Link will always take you to the Fresno State portal to sign in first.



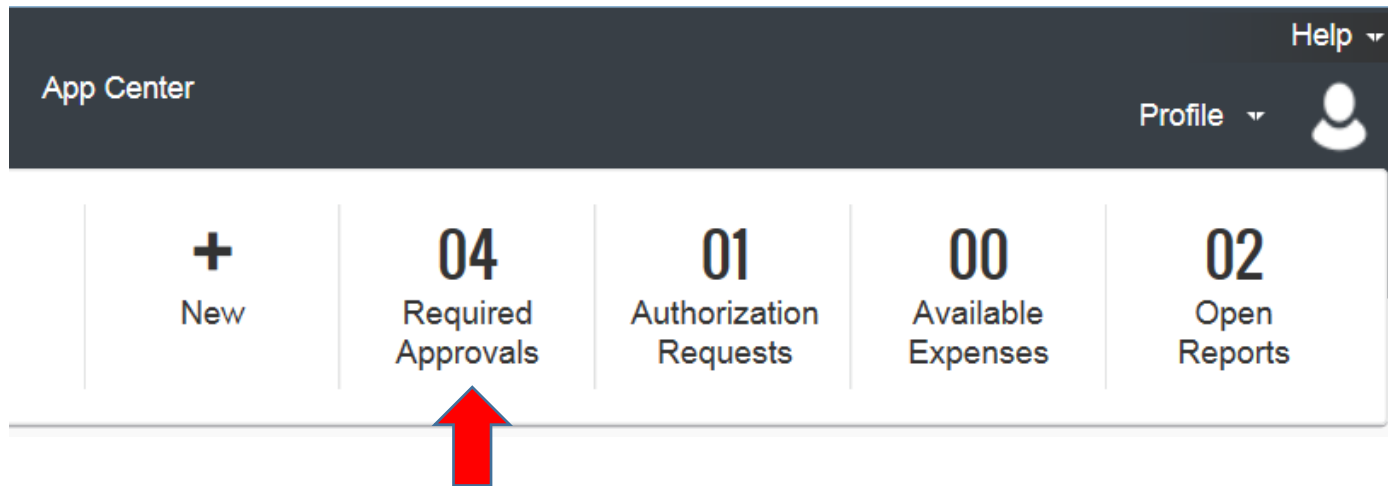
You have a request pending your approval.

Request From	<input type="text"/>
Request Name	Attend NACUBO Annual Meeting
Request Purpose	
Total Posted Amount	2,466.00 USD

Link To Approve Request

https://my.fresnostate.edu/psp/mfs/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST

You may also check your Concur dashboard to see if there are any pending approvals. Sign into your Concur system to see the tabs.



Click the Request or Expense Report Name to be approved.

Approvals Home Requests Reports

Approvals


01
Requests

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Expense Reports

Requests

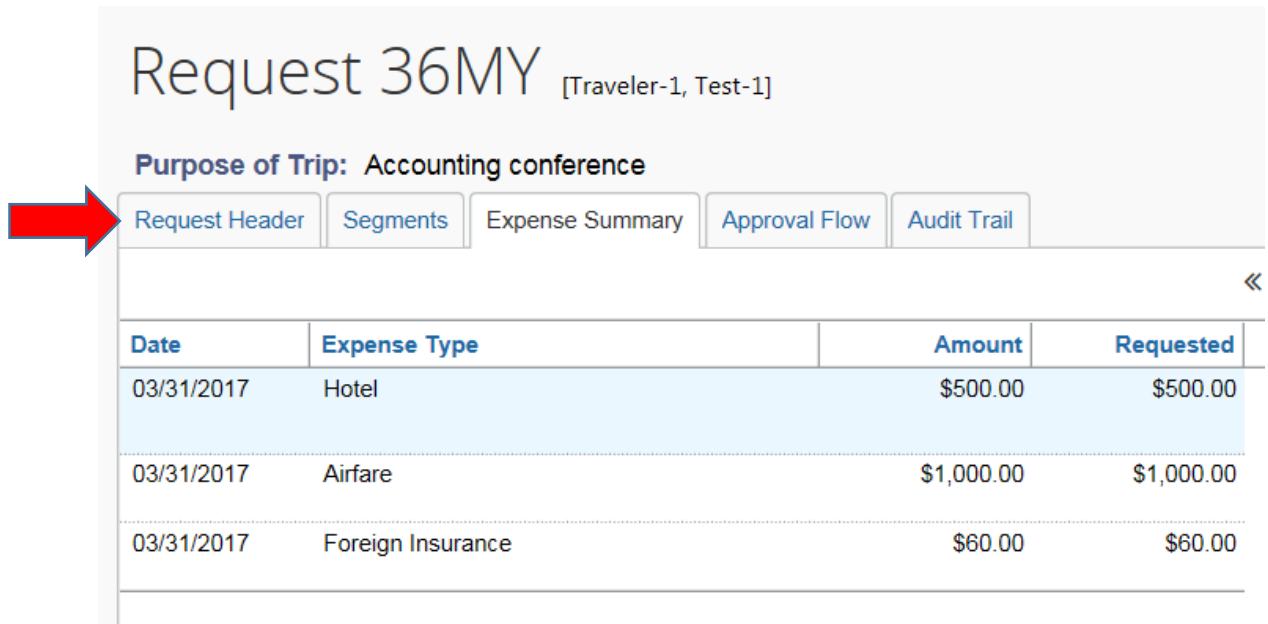
Approve

	Request Name	Request ID	Employee	Request Dates
<input type="checkbox"/>	Study Abroad	334Y	Traveler-1, Test-1	08/24/2016 08/31/2016



When approving a Concur Request or Expense Report, start with the Report Header tab.

For Requests, click the “Request Header” tab.



Request 36MY [Traveler-1, Test-1]

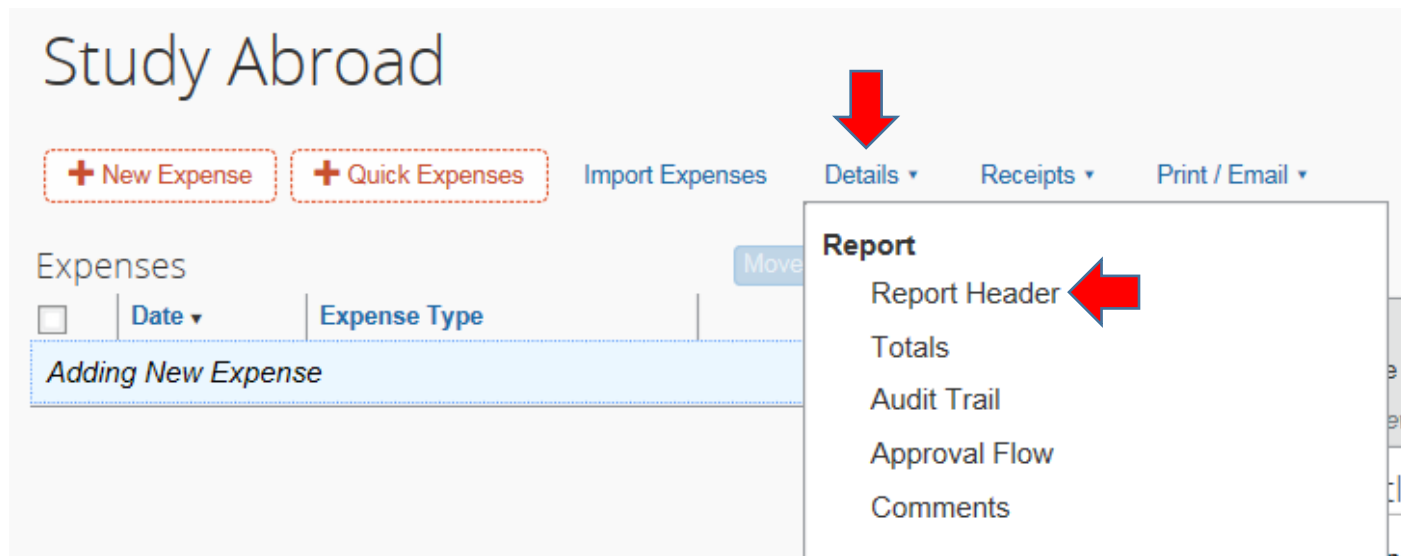
Purpose of Trip: Accounting conference

Request Header Segments Expense Summary Approval Flow Audit Trail

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Date	Expense Type	Amount	Requested
03/31/2017	Hotel	\$500.00	\$500.00
03/31/2017	Airfare	\$1,000.00	\$1,000.00
03/31/2017	Foreign Insurance	\$60.00	\$60.00

For Expense Reports, click the Details link, and select “Report Header.”



Check to make sure all the fields are completed with the correct information:

1. Type of travel corresponds with the destination,
2. Purpose of trip,
3. Start & End Dates of trip,
4. Make sure the correct chartfields are entered,

Request 334Y [Traveler-1, Test-1] Cancel Save Attachments ▾ Print / Email ▾ Send Back Request Approve Approve &

Status: Submitted & Pending A **Amount:** \$3

Purpose of Trip: Study Abroad

Request Header ⚠ Segments Expense Summary Approval Flow Audit Trail


⚠ New Requests for international travel will be released for approval after a Foreign Travel Insurance request is submitted:
<http://www.fresnostate.edu/adminserv/facilitiesmanagement/ehsrms/riskmgt/insurance/foreigntravelform.html>

Type of Travel International ▾	Purpose of Trip Study Abroad	Request Policy *FS Travel Request Policy 2 3/17 ▾	Start Date 08/24/2016 📅
End Date 08/31/2016 📅	Comment <input type="text"/>	Employee last name Traveler-1, Test-1	Travel Days 8
Group Leader No ▾	High Hazard No ▾	Class (00000) Default Sub-Class	Project <input type="text"/>
Program <input type="text"/>	Is there a current travel warning for location? No ▾		

Fund (90000) TF-CSU Operating Fund ▾	Department (81600) Office of Chief Inform Officer ▾	Emp ID TravelerTest
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For Requests, click the Segments tab to check the details of the trip. Scroll down to see all aspects of the trip.

Purpose of Trip: Study Abroad

Request Header  Segments Expense Summary Approval Flow Audit Trail

Lodging-Per Diem Estimated Total : \$1,600.00

Departure City: Fresno, California

Departure Date: Thursday, August 25, 2016


Detail:

Arrival City: Barcelona, SPAIN

Arrival Date: Wednesday, August 31, 2016

The Expense Summary will give you a snapshot of the estimated expense of each aspect of travel.

Purpose of Trip: Study Abroad


Request Header  Segments Expense Summary Approval Flow Audit Trail

Date	Expense Type	Amount	Requested
08/25/2016	Hotel	\$1,600.00	\$1,600.00
08/25/2016	Airfare	\$1,000.00	\$1,000.00
08/25/2016	Taxi	\$150.00	\$150.00
08/25/2016	03. Meals	\$440.00	\$440.00

Expense Type
Hotel

For Expense Reports, click the expense on the left-hand side to see the details of the expense on the right-hand side.

Expenses View ▾ ‹


Date ▾	Expense Type	Amount	Requested
04/06/2017 	Registration Fresno, California	\$200.00	\$200.00

Expense Receipt Image

Expense Type	Transaction Date
Registration	04/06/2017
Enter Vendor Name	City of Purchase
	Fresno, California
Payment Type	Amount
Employee Paid ▾	200.00 USD ▾
Reviewed	Approved Amount
No ▾	200.00
<input type="checkbox"/> Personal Expense (do not reimburse)	Comment

The Approval Flow will show you who the next approvers are and in which order they will receive the Request or Expense Report. The approval flow may be different depending on the type of travel (In-State, Out of State, or International Travel). The Approval Flow for Expense Reports is located in the Details link.

Purpose of Trip: Study Abroad


Request Header  Segments Expense Summary Approval Flow Audit Trail

Manager Approval:
Test Approver, Manager

Dean/Director:
Test, Approver Dean-Dir
(this step may be skipped)


VP Authorized Approver Level 2:
Test, Approver VP Financial Services
(this step may be skipped)

Chief Financial Officer 3:
Test, Approver Dean-Dir
(this step may be skipped)

Cost Object Approval:


The Cost Object Approver is the individual who approves the *funding source* in your department. If the Cost Object Approver is the same as the Manager, Dean/Director, Provost/VP, or C.F.O. the system will skip the approval, and forward the report to the next approver.

You might consider the Audit Trail as the report “diary.” The Audit Trail logs every addition, change, deletion, comment, etc. and is a part of the report’s history. The Audit Trail for Expense Reports is located in the Details Link.

Purpose of Trip: Study Abroad				Amount: \$3,190
Request Header 				
Segments Expense Summary Approval Flow Audit Trail				
Request Level				
Date/Time	Updated By	Action	Description	
08/23/2016 11:17 AM	Traveler-1, Test-1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:	
08/23/2016 11:17 AM	Traveler-1, Test-1	Exception	New Requests for international travel will be released for approval after a Foreign Travel Insurance request is submitted: http://www.fresnostate.edu/adminserv/facilitiesmanagement/ehsrms/riskmgt/insurance/foreigntra	
08/23/2016 11:17 AM	Traveler-1, Test-1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:	
Entry Level				
Date/Time	Updated By	Action	Description	

Once the report has been inspected carefully, click the “Approve” button to forward the report to the next approver, if any. To approve the report and forward to another approver, click the “Approve & Forward” button. To review any attachments that the employee may have attached, click the “Attachments” button.

Attachments ▾ Print / Email ▾ Send Back Request Approve Approve & Forward

Status: Submitted & Pending Approval
Amount: \$3,190.00

If the report needs to be sent back to the employee for any reason, to add more information or change an amount, for example, click the “Send Back Request” button. When sending a report back to the employee, an explanation must be included.

Send Back Request ✕

Comment History

Creation date	Entered By	Comment Text
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Add a comment to explain why you are returning the request. Then click OK to return the request to the employee.

Comment

Request denied