

**Job Aid: Approvers in Concur****Approvers in Concur**

This aid will provide tips for approvers and what to look for when approving requests and expense reports. Only supervisors in PHR, fiscal officers/account managers/account supervisors in KFS and PIs are able to approve in Concur.

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## General tips & information

- Travel cards (Tcards) are highly recommended because it reduces the financial burden on travelers
- Receipts attached to expenses must be itemized receipts
  - Look out for dates, vendor names, alcohol and anything that may be considered personal expenses
- When combining business and personal, **a fare comparison must be attached to the request and expense report**
- Roster lists must be attached to the request and expense report for events and group travel/group meals
  - Attendees must be added on the actual expenses for group travel/group meals
- Conference/event agendas should also be attached to requests and expense reports to determine what meals would be provided
- Encourage travelers to make adjustments to requests and expense reports themselves so they can become familiar with Concur
- If a form is returned to the traveler, it will be sent through the entire approval process again when it is resubmitted
- If a Fiscal Officer approver is assigned to be a [delegate](#) supervisor approver, 2 approvals will be required (one for each role)
- Concur will auto calculate the GSA meal per diem rate using the business travel dates listed on the request. Per Diem is the best way to handle meals. Individual meals will not be reimbursed at full cost anymore, only the per diem rate will be reimbursed
  - Buying meals on the Tcard will require more work on expense reports
    - Receipts will be required along with adding additional “offset” expense lines on top of recording per diems
  - Easiest route – Add per diem on the request, the UMD employee traveler takes care of their meals personally, then [adds the per diems](#) to their expense report after their trip
    - Receipts are not required
- The [website](#) has useful information and guides for people to use
  - **Quick Links** on the right side of the page
    - **Travel Management Company** – New travel agency to use with Concur
    - **Concur Help Center** – Includes a link to the [login instructions](#), job aids, and support information
      - Setting up your Concur profile correctly is **very** important, please make sure to always direct people to the [job aid for profile setup](#)
    - **Concur Travel Procedures** – Information in a grid format that outlines what types of expenses are allowable and unallowable

## Alerts

You will see 2 types of alerts on requests and expense reports.



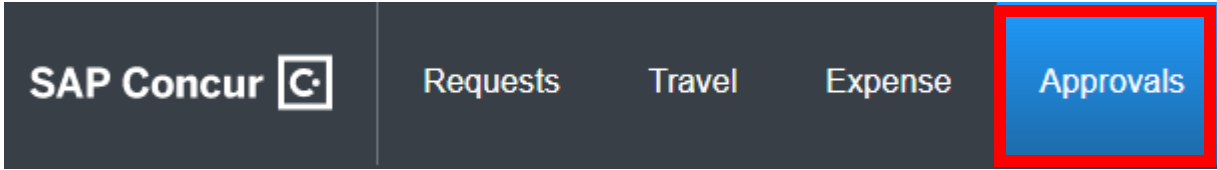
Yellow alerts are notifications that comments/dates/documentation may need to be added/corrected. Requests and expense reports can still be submitted and approved with these alerts.



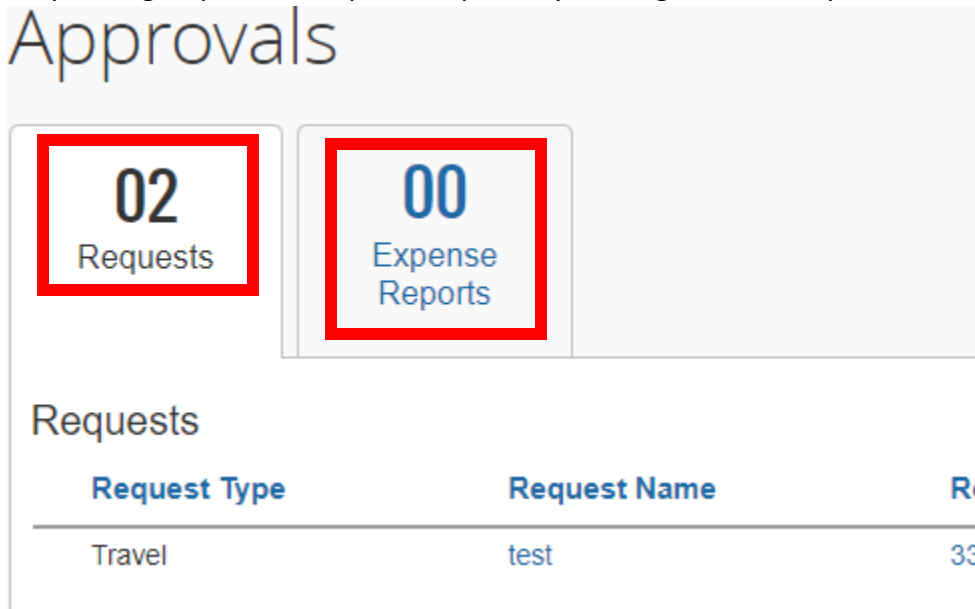
Red alerts **must** be handled before submitting/approving requests and expense reports.

## How to see what is in your approval queue

1. Click on **Approvals** at the top, black header



2. You can look at pending requests or expense reports by clicking on their respective tabs



The screenshot displays the 'Approvals' page. At the top, the word 'Approvals' is written in a large font. Below it, there are two summary cards: one for 'Requests' showing a count of '02' and another for 'Expense Reports' showing a count of '00'. Both cards are highlighted with red borders. Below these cards, there is a section titled 'Requests' which contains a table with the following data:

Request Type	Request Name	Re
Travel	test	33

## Approving Travel Requests

- You can use the screen on the previous page or use the **MY TASKS** section after you log into Concur to see your pending items for approval.
  - You can view a pending request by clicking the request you want to view

**MY TASKS**

**02** Required Approvals →

TravelerOne T. | Blank request test  
\$0.00 — Travel

TravelerOne T. | test  
\$0.00 — Travel

**00** Available

You currently have no expenses.

- To view the specific travel information, click on the name of the request header

**Test 1 \$638.00**

TravelerTwo Test | Submitted & Pending Approval | Request ID: 333G

Request Details ▾ Print/Share ▾ Attachments ▾

**EXPECTED EXPENSES**

Add Edit Delete Allocate

Expense type ↑↓ Details ↑↓

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Airfare

3. Once you open the request header, you can view the trip purpose, travel dates, and account details. The guest's name will be listed in the header as well if the request is for a non-employee.

Test 1 | Request ID: 333G

Request Type  
\*UMD Travel and Hosting

Trip Name/Purpose Test 1	Business Travel Start Date 04/07/2022	Business Travel End Date 04/08/2022
Trip Purpose Research	Final Destination City Delhi, INDIA	Final Destination Country INDIA (IN)
Traveler Type Staff	Trip Type 4. International	Will this trip include personal travel? No
Personal Travel Dates	Detailed Business Purpose / Benefit to University	<input type="checkbox"/> UMD Campus Visit? <input type="checkbox"/> No Cost Trip?

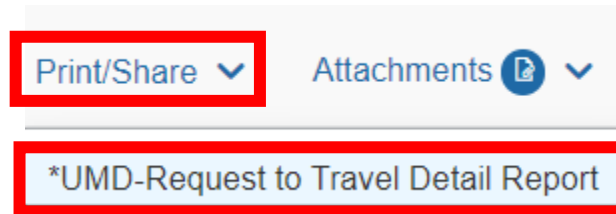
Guest Traveler

Campus \* (011) College Park (UM) | KFS Account Number \* (0000020) BANK 02 - 1993 SERIES A BONDS | Division (45) General University (GENU)

Cancel Save

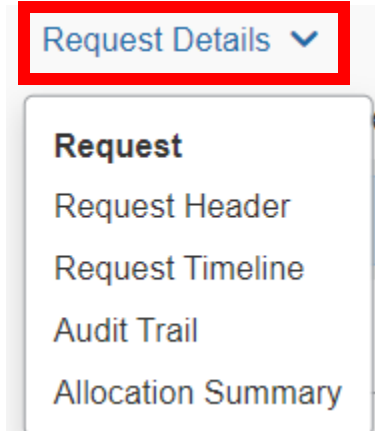
Another way to view all of the request's information is the **Print/Share** dropdown menu

1. Click the **Print/Share** dropdown menu then click **\*UMD-Request to Travel Detail Report**, you will see a general summary of the entire request including comments



## The Request Details

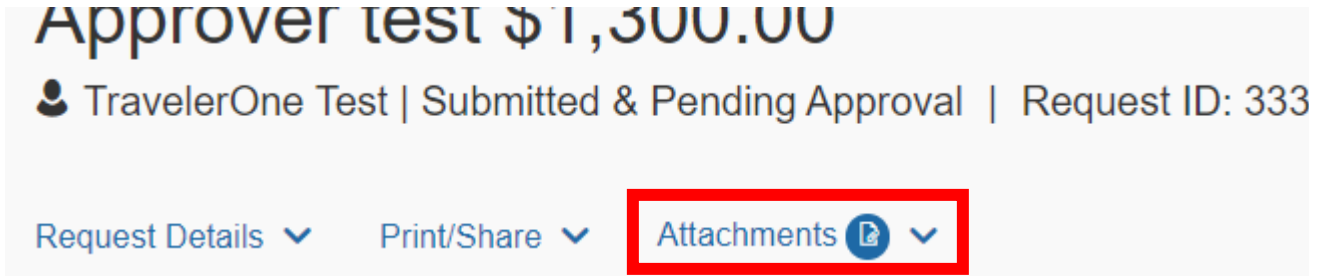
1. If you click on the **Request Details** dropdown menu you will see several options



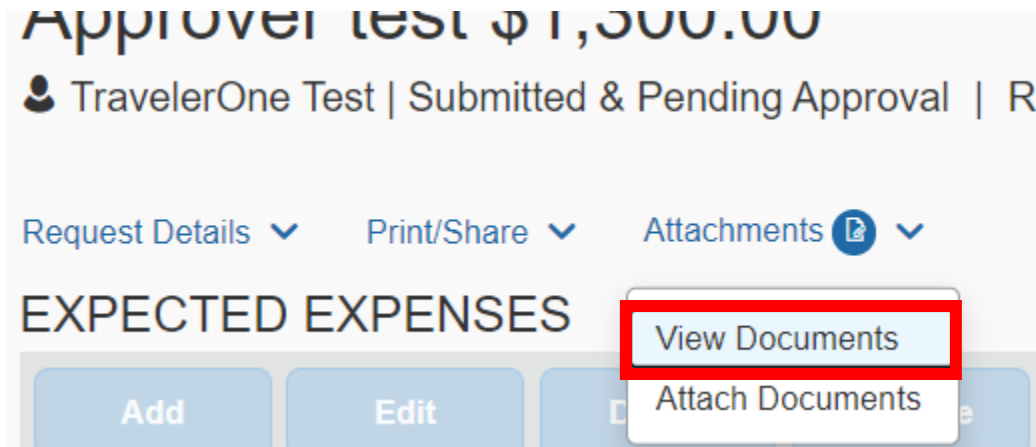
- a. **Request Header** – Shows you the request header, same as if you clicked on the request's title
- b. **Request Timeline** – Shows you a basic outline of where the request is at in workflow
- c. **Audit Trail** – A more detailed version of the Request Timeline
- d. **Allocation Summary** – Shows you all the KFS accounts being used on the request

## Viewing attached documentation on a request

1. Click the blue **Attachments** dropdown menu



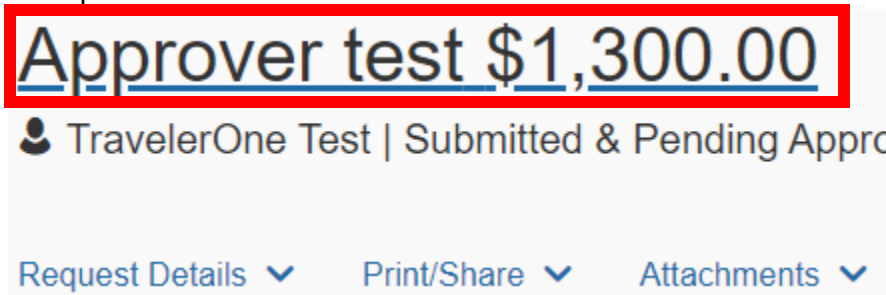
2. Click **View Documents** and you should be able to see any documentation that was attached to the request



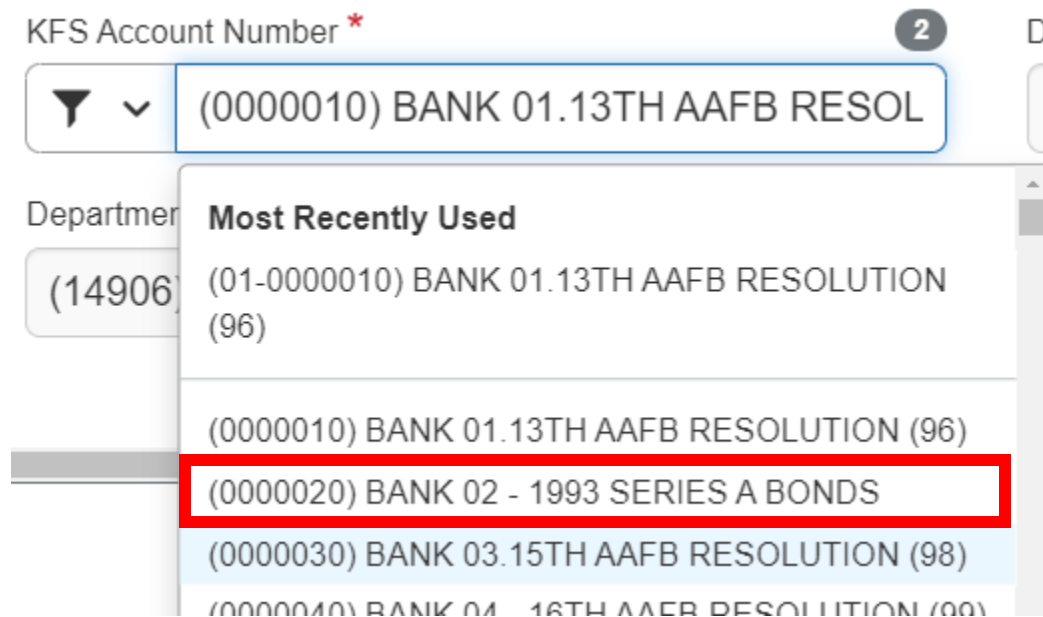
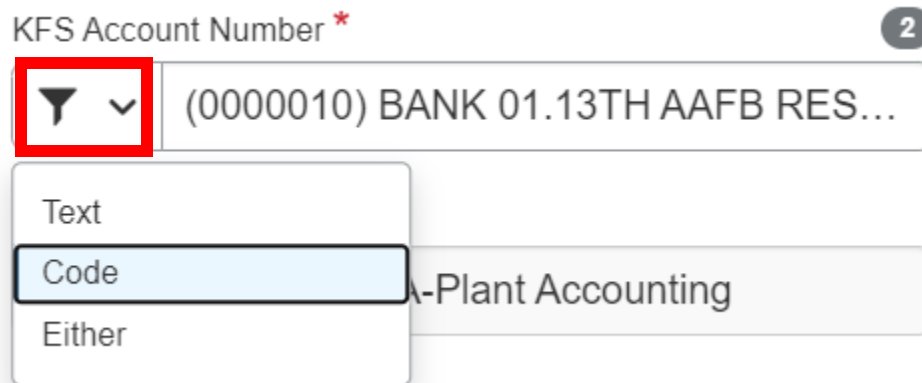


## Updating KFS account on the request header

1. If **all** expenses on the request need to be charged to the same KFS account, you can open the request header and update the KFS account #



2. You can choose how to search for the KFS account by clicking the icon on the left. Please make sure to click the account so it is added properly into the field



## Updating KFS account on individual expenses on requests

1. Check the boxes for the expenses you need to change the KFS account #s for
  - a. You can choose multiple expenses and add/change the KFS #s for them in one go

<input checked="" type="checkbox"/>	Rail
<input type="checkbox"/>	Conference Registration

2. Click on the blue **Allocate** button

**EXPECTED EXPENSES**

3. Choose how you want to split the expense, by **Percentage** or **Amount**

4. Click the blue **Add** button

5. Find and select the KFS account #

! \*KFS Account Number \* 2

6. Click the blue **Add to List** button


ancel

7. Put in the amount for the new KFS account # and click **Save**




Code ≡	Percent %
01-0000020	50

## Icons on expense lines

If you hover your mouse cursor over any of these icons for each expense, a popup window will appear with the content

-  Yellow alerts are there as reminders, they will not stop you from approving the expense report
  - The **Exceptions** section above the **Expenses** section shows these alerts as well
  - You can hide the **Exceptions** section by clicking **Hide Exceptions** on the right side

[Hide Exceptions](#)

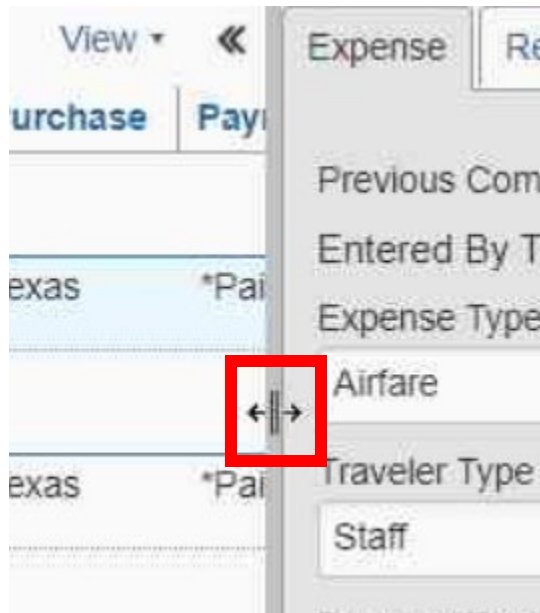
-  Shows you the receipt for the expense
-  Shows the allocation for the expense if it's been edited/changed
-  Shows any comments that were included on the expense

## Viewing expenses on expense reports

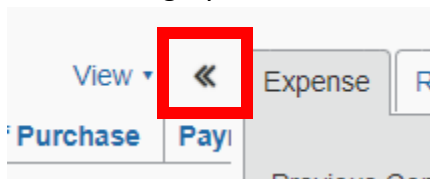
1. Click on an expense line and the information for it will populate the gray section on the right

The screenshot shows the 'Expenses' section of a software interface. On the left, there is a table with columns for 'Transaction Date', 'Expense Type', 'Enter Vendor N...', 'Additional Info...', 'City of Purchase', and 'Pay'. Three expense lines are visible: 'Airfare' (07/08/2022), 'Conference Registration' (07/01/2022), and 'Rail' (07/02/2022). At the bottom of the table, it shows 'TOTAL AMOUNT \$1,050.00' and 'TOTAL REQUESTED \$1,050.00'. On the right, a gray panel displays details for the selected 'Airfare' expense, including 'Previous Comment', 'Expense Type', 'Transaction Date', 'Trip Type', 'Trip Purpose', 'Traveler Type', 'Destination City', 'Vendor', 'Class of Service', 'Payment Type', 'Amount', 'Reviewed', 'Approved Amount', and 'Comment'. Buttons for 'Save', 'Allocate', and 'Attach Receipt' are at the bottom right of the gray panel.

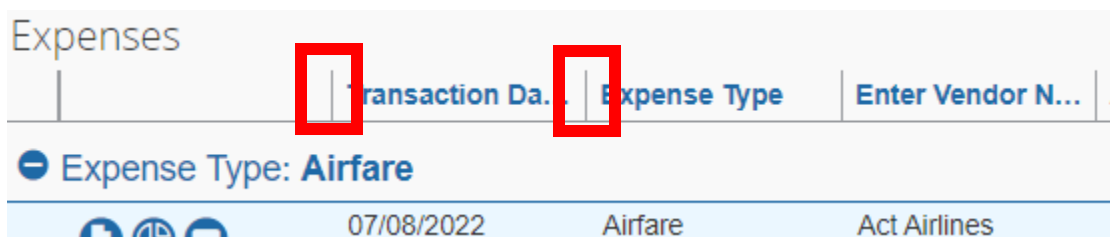
2. You can resize the gray section by clicking and dragging between the white and gray sections



3. Clicking the double arrow icon will widen the gray section to the width of the page

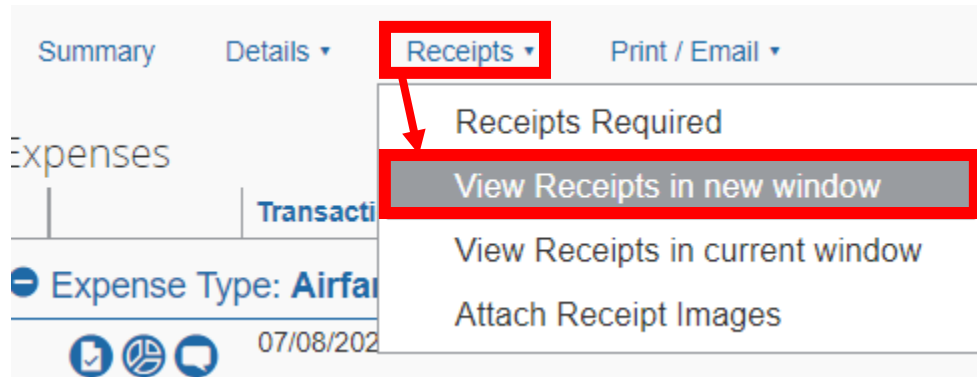


4. You can change the width of the columns for the expenses by clicking and dragging the lines next to the column names



## Viewing attached documentation on expense reports

1. Click the **Receipts** dropdown menu and click **View Receipts in new window**

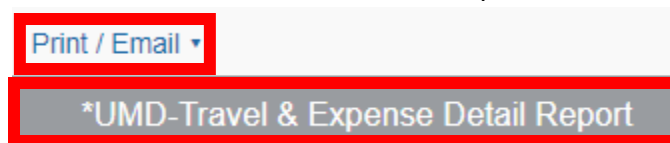


Note: This will show all documentation that was attached by the employee.

- Ex. Roster list, conference agenda, fare comparisons, etc.

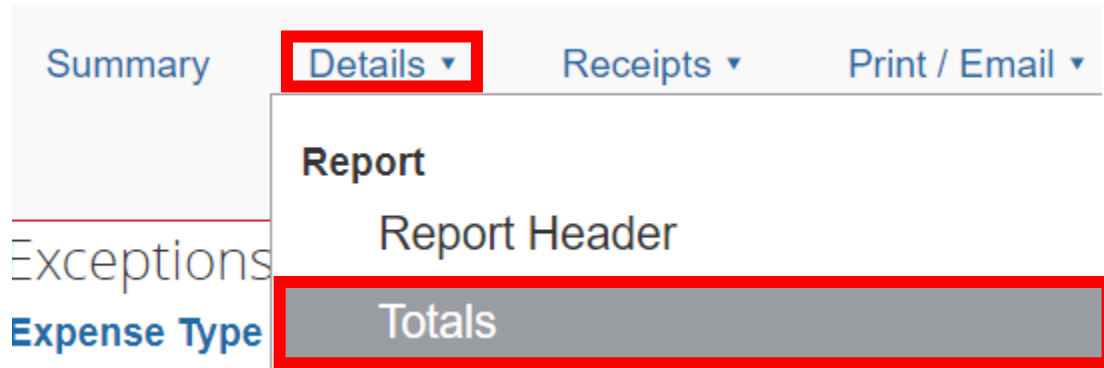
## Print/Email dropdown menu

1. This dropdown menu is identical to the Print/Share menu on requests besides the naming



## Report Totals

1. You are able to view the totals for the expense report by clicking **Details** and **Totals**



2. **Company Disbursements**

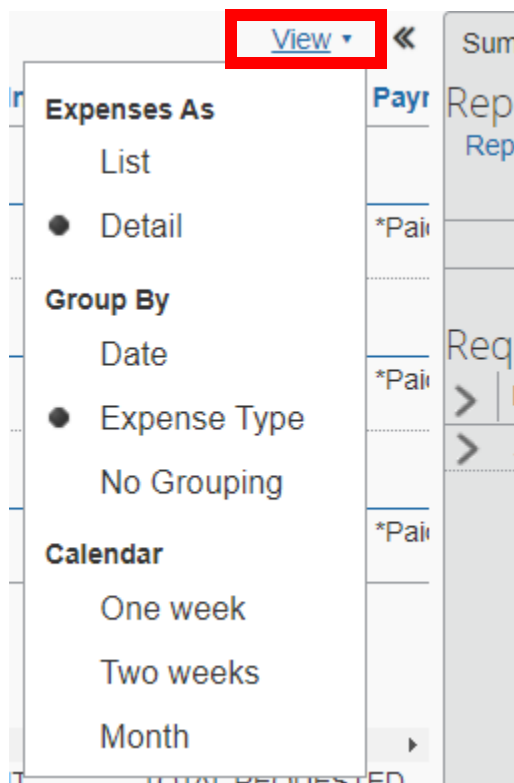
- **Amount Due Employee** – Amount the traveler will be reimbursed
- **Amount Due \*UMD Tcard** – Amount charged to the Tcard
- **Amount Due \*UMD Travel Agent Card** – Amount charged to UMD ghost card

3. **Employee Disbursements** – Amount owed to the university

Report Totals		×
<a href="#">Expense Report</a>		
Report Total :	\$2,814.31	
Less Personal Amount :	\$0.00	
Amount Claimed :	\$2,814.31	
Amount Rejected :	\$0.00	
Amount Approved :	\$2,814.31	
<a href="#">Company Disbursements</a>		
Amount Due Employee :	\$339.29	
Amount Due *UMD Tcard :	\$1,023.06	
Amount Due *UMD Travel Agent Card :	\$1,451.96	
Total Paid By Company :	\$2,814.31	
<a href="#">Employee Disbursements</a>		
Amount Owed Company :	\$0.00	
Total Owed By Employee :	\$0.00	

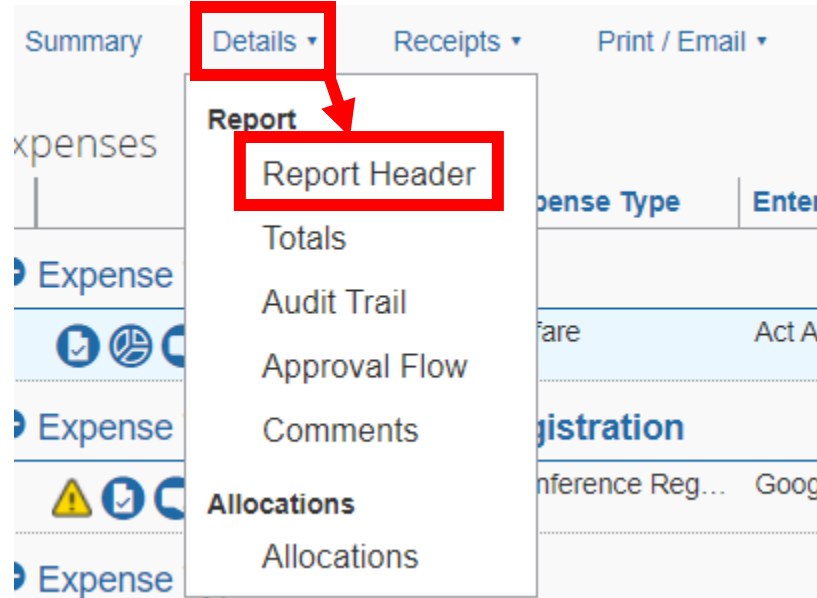
## Sorting expenses

1. Click the **View** dropdown menu and sort the expenses how you want them



## Updating KFS account on the expense report header

1. Click the **Details** dropdown menu and click **Report Header**



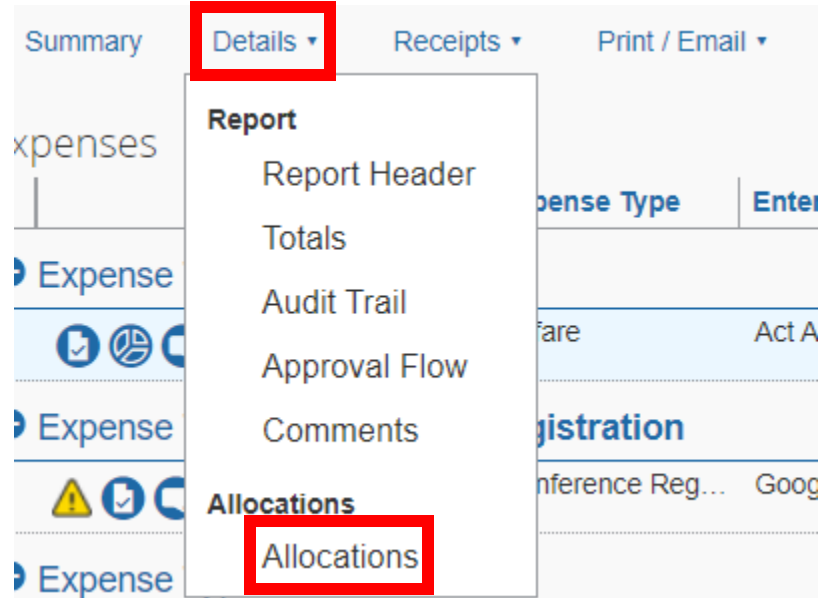
2. Search and select the KFS # you want to use

Campus	KFS Account Number	Division
(01) College Park (UM) ▼	(0000010) BANK 01.13TH A/ ▼	(45) Ger
Department	Unit	
(14906) GENU-CFCA-Plant Account	(1490601) GENU-CFCA-Plant Acco	

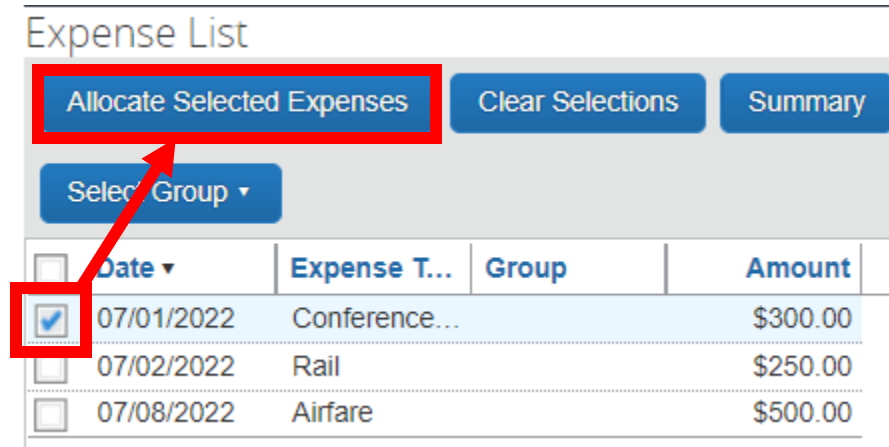


## Updating KFS account on individual expenses on expense reports

1. Click the **Details** dropdown menu and click **Allocations**



2. Select the expense(s) you want to edit by checking the box for the expense(s) then click the blue **Allocate Selected Expenses** button



3. Click the **Add New Allocation** button. You can click this multiple times to add more lines if you need to add multiple KFS accounts. Search for and select the KFS account you need.

Allocations Total: **\$300.00** Allocated: **\$300.00 (100%**

Allocate By: ▾ | **Add New Allocation** | Delete Selected Allocations | Favorites ▾ | Add to F...

<input checked="" type="checkbox"/>	Percentage	Campus	KFS Account Number	Code
<input checked="" type="checkbox"/>	100	(01) College P...	BANK 01.13TH AAFB RESOLU ▾	01-0000010

Type to search by:

Text  Code

(Code) Text

- (0000010) BANK 01.13TH AAFB RESOLUTION (96)
- (0000020) BANK 02 - 1993 SERIES A BONDS
- (0000030) BANK 03.15TH AAFB RESOLUTION (98)
- (0000040) BANK 04 - 16TH AAFB RESOLUTION (99)
- (0000050) BANK 05.17TH AAFB RESOLUTION (99)
- (0000060) BANK 06.18TH AAFB RESOLUTION (00)
- (0000070) BANK 07.19TH AAFB RESOLUTION (01)
- (0000080) BANK 08.CERTIFICATES OF PARTICIPATION
- (0000090) BANK 09 - 20TH AAFB RESOLUTION (02)

4. Click **Save** once you are done
5. You can click the **Summary** button to make sure your new allocations were saved

Allocations for Report: Approver test

Expense List

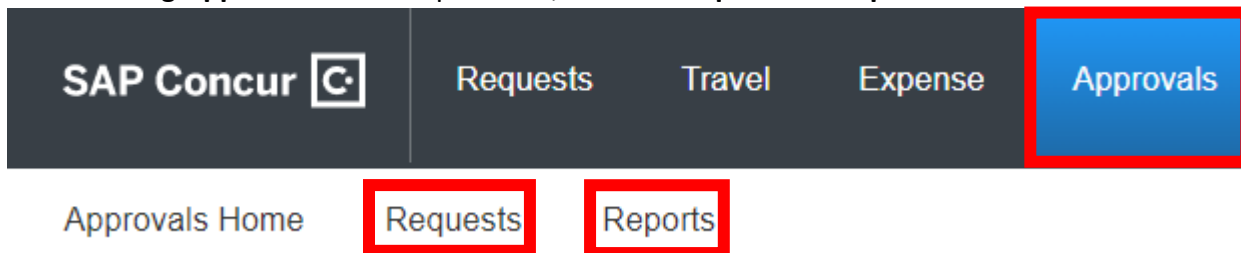
Allocate Selected Expenses | Clear Selections | **Summary**

Select Group ▾

<input type="checkbox"/>	Date ▾	Expense T...	Group	Amount
<input type="checkbox"/>	07/01/2022	Conference...	1	\$300.00
<input type="checkbox"/>	07/02/2022	Rail		\$250.00
<input type="checkbox"/>	07/08/2022	Airfare		\$500.00

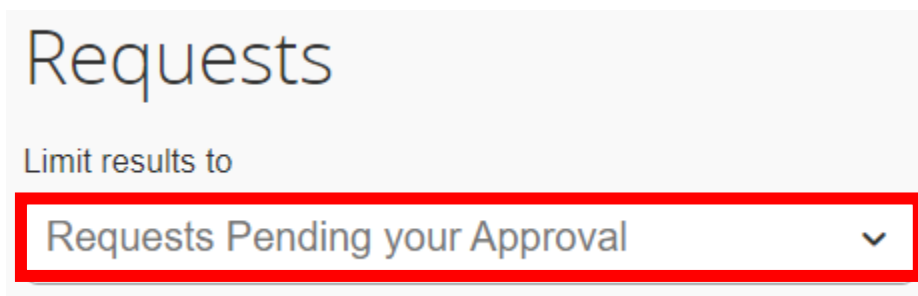
## How to look up previously approved requests and expense reports

1. After clicking **Approvals** at the top header, click on **Requests or Reports** in the white header



2. Use the drop-down menu to filter out how far back you want to go

### Requests



### Expense Reports

