Approver Quick Guide

1. **Log in to Concur**
2. **Click Approvals** at the top of page or **Required Approvals**. Request (travel authorization) and Expense Report documents are separated on tabs. The number indicates the total pending your approval:

![Concur Approvals Interface]

3. **Select Requests or Expense Reports tab**, then **click the Request or Report Name** to open.

   **NOTE**: the Expense Reports approver view will look slightly different from the Request approver views shown below.

4. **Review the information on the Header** by clicking on the Trip Name:
5. To make changes on the Header funding, start by clearing the Index field and begin typing the correct fast index (enter GRANT for grant funding) and select from the list options below the field:

6. Click each successive field drop down to select the only list option:

7. Add comments if desired. Select Save or cancel to return to the expenses page to review.

8. Total Approved (expense reports only) includes both reimbursable and paid by PCard expenses. Review amounts by clicking Details > Totals:
9. **Review Allocations** (if there are multiple funding sources) by clicking Details > Allocations > Summary:
10. **To change funding allocations**, select one or more expenses and click **Allocate:**
11. Add allocations (funding sources) and split by Amount or Percent (Expense Report View):

**TA Request View:**
12. Confirm your changes by reviewing the Allocation Summary as shown above in #9.
13. **When ready to approve** click the orange “Approve” button on the top right.
14. **If corrections are needed**, select More Actions and **Send Back to Employee**. Include instructions for changes needed in the comment.