KENNESAW STATE UNIVERSITY
OFFICE OF FISCAL SERVICES

Approvals

An approver is the "check" in the expense reporting process to identify potential or actual errors in expense reporting and is equally accountable for all expenditures, as stated in the University System of Georgia Business Procedures Manual Section 4.2.4: "Institutions may require multiple approvers for certain expense reports; in these instances, all approvers in the submission process are held accountable."

By approving travel expenses, the approver is attesting that he/she has thoroughly reviewed each transaction and the supporting documentation. Approval confirms that all transactions are allowable expenses within University and State travel policies, as well as budget limits.

There is one default approver in Concur. The budget owner of the traveler's home department (i.e. Department Chair or Dean) appears as "Manager Approval" in the approval flow. The employee should add additional required approvers, to include the Business Manager or other department-designated approvers. For travel funded outside of the department, the budget owner and Business Manager for that speed chart must be added to the approval flow.

Access Approval Queue

An approver will receive a system-generated email notification with a link when a traveler submits a travel request, cash advance request or an expense report for review.

» Login to the Concur website: Concur Solutions.
» Enter the user ID and Password information provided to you by the KSU travel administrator. Note: Remember that your user ID ends in @ksu. If you are unable to access the system, submit a ServiceNow ticket at service.kennesaw.edu/ofs or call 470-578-4394.
» Click Approvals tab. Select tab for approval item below (Request, Report, or Cash Advance).

Approve Travel Request

» To view the request, login to Concur and Click on the Approvals tab.
» In the Approvals queue, click on the Requests tab.
» Click the request name of the pending travel request to begin review.
» On the Request Header tab, review the general information regarding the trip: Trip name, Start/End Dates, Purpose, Estimated amount, Speed Chart, and any comments entered by the employee and/or other approvers.
» Click on the Segments tab to review the Air, Hotel, Rental Car, Lodging, Meals, Miscellaneous, and Prepaid Registration. This provides estimated amount, trip start/end dates and location, details, and comments.
» Click the Allocate button (lower right) and then select the blue Summary button to view current allocation(s). Click Close in the lower right corner. To request a correction, add a comment on the approval page for the Business Manager to update accordingly. Note: It is recommended that the department Business Manager review this portion of the request carefully.
» To print the request, click the Print/Email button (upper right). Select Travel Request Report. On the printable view pop-up page, click Print to send to the printer or save as a PDF.
» Click on the Approval Flow tab to verify other approvers for the speed charts in use. To add another approver, click the Approve & Forward button (upper right). Alternatively, click the Send Back Request button if more than one

additional approver is required and/or additional corrections are required. Otherwise, click the red button to Approve.

Approve Cash Advance

- To view the Cash Advance Request, login to Concur and Click on the Approvals tab.
- In the Approvals queue, click on the Cash Advance Request tab.
- Click the title of the pending Cash Advance Request and review.
- Review the Details tab.
- Click Comments History tab to review.
- Click Audit Trail tab to review all activity.
- Click the Approve button to approve the Cash Advance Request or the Reject button to deny.
- Click OK.

Approve Travel Expense Statement

- To view the Expense Report, login to Concur and Click on the Approvals tab.
- In the Approvals queue, click on the Expense Reports tab.
- Click the title of the pending report name to begin review.
- On the reports page, select EACH expense to view the details of the expense. Select the Receipt Image tab in the right column to view the uploaded documents.
- Check the Details option to easily access report-level details such as Report Header, Totals, Audit Trail, Approval Flow, Comments, Allocations, and Cash Advance information, if applicable. Check for accuracy and travel policy compliance.
- View any exceptions on the report in the Exceptions section (red border) above the Expense detail or click the warning symbol next to the expense item.
- To view allocations, select Details, then Allocations from the menu.
- To view any notes on the expense item from the preparer, click the comment icon.
- To add a comment, click on the expense item, select Details, then click Comments from the menu. Enter your comment and click Save.
- To view the activity on the expense report, click on the Details option and select Audit Trail.
- To view Cash Advances assigned to this Expense Report, select Details, then select Assigned under Cash Advances.
- To approve the entire Expense Report, click the red Approve button in the upper right corner of the page.

Approve and Forward (to another approver)

- In the Approvals section of Concur, click the name of the report that you want to view.
- Click the Approve & Forward button, in the upper right corner of the screen.
- In the Approval Flow window, click the Search Approvers by dropdown arrow.
- Enter the last name of the approver in the search criteria.
- From the list of options displayed by the search, select the appropriate approver.
- Click Send to Approver button.

Send Expense Report Back to Employee

- In the Approvals queue section of Concur, click the report name that you want to view and review each expense.
- If not satisfactory, do not approve. Click Send Back to Employee.
- In the send Back Report page, add notes in the Comments box to inform the employee of next steps.
- Click OK.