Concur Approver Training

Reviewing and approving travel requests and expense reports

Approvers Training

Are you an approver for travel requests and expense reports?

Why Your Approval Matters

As an approver, you help ensure that:

- Travel supports a valid business purpose.
- Expenses comply with UTEP and Concur policies.
- Funding sources are appropriate and available.
- Submitted expenses are accurate and properly documented.
- University funds are used responsibly.



What Approvers Can Do

- Approve submissions
- Return submissions for correction
- Review receipts and supporting documentation
- Verify business purpose and funding information

Approvers Training

Are you an approver for travel requests and expense reports?

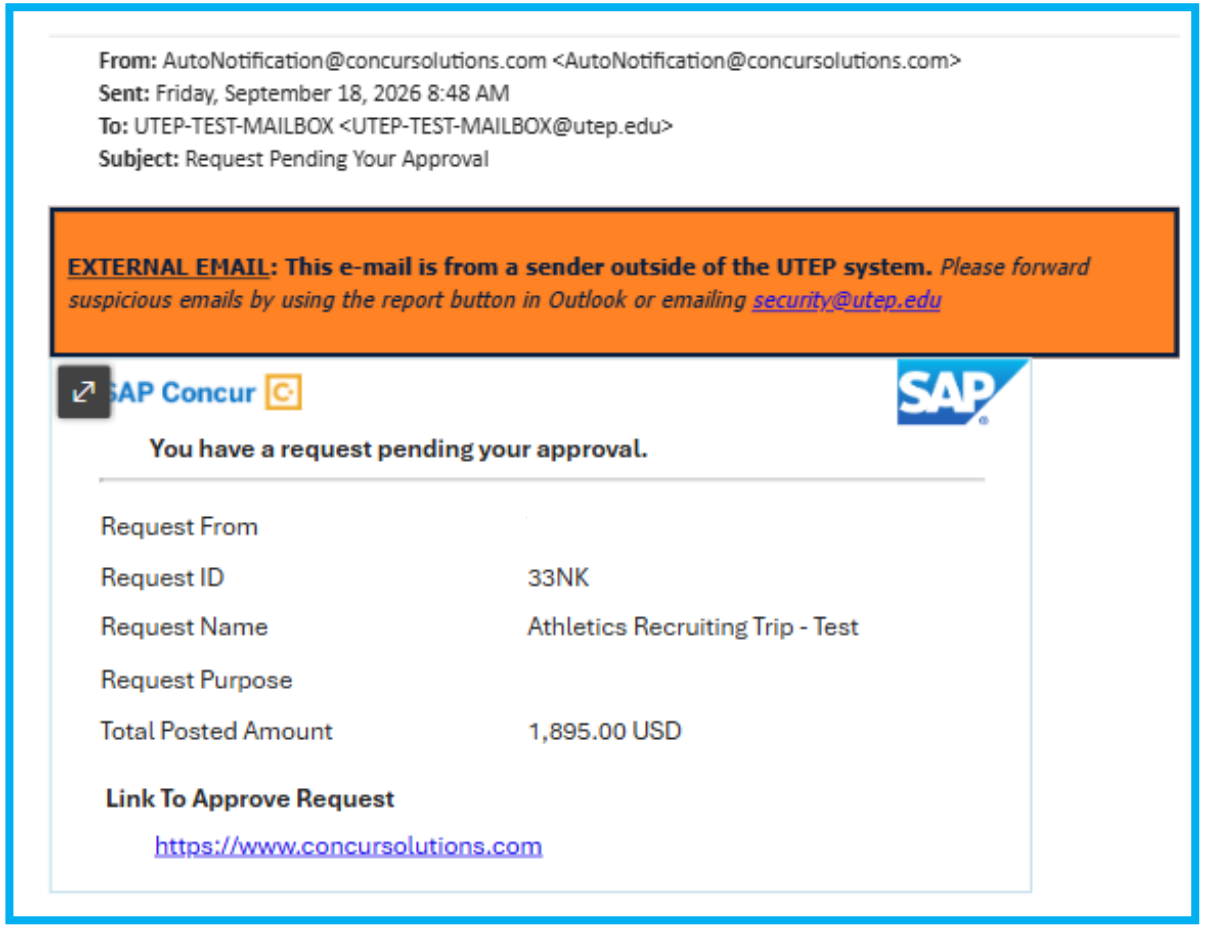


Approvers Email for Travel Request Submission

Approvers receive this notification via email

You will be notified via email about a request/report pending your approval.

You will click on that link, and it will take you to the request/report that you need to review.



From: AutoNotification@concursolutions.com <AutoNotification@concursolutions.com>
Sent: Friday, September 18, 2026 8:48 AM
To: UTEP-TEST-MAILBOX <UTEP-TEST-MAILBOX@utep.edu>
Subject: Request Pending Your Approval

EXTERNAL EMAIL: This e-mail is from a sender outside of the UTEP system. *Please forward suspicious emails by using the report button in Outlook or emailing security@utep.edu*

SAP Concur

You have a request pending your approval.

Request From	
Request ID	33NK
Request Name	Athletics Recruiting Trip - Test
Request Purpose	
Total Posted Amount	1,895.00 USD

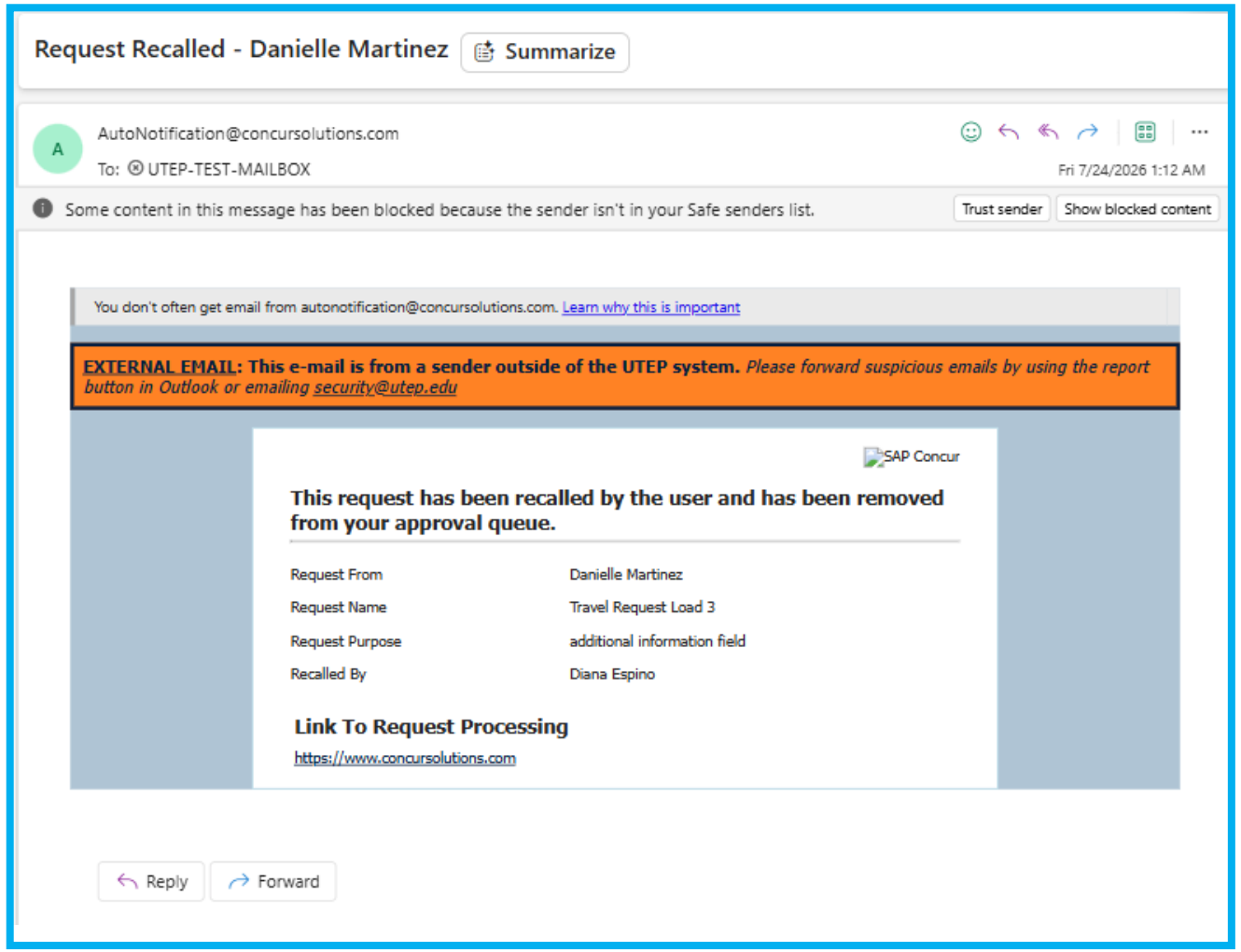
Link To Approve Request

https://www.concursolutions.com

Approvers Email for Travel Request Submission

Approvers receive this notification via email if any expense/travel report gets recalled

If a traveler, recalls a report/request you will be notified about it via email. This is how the email will look.

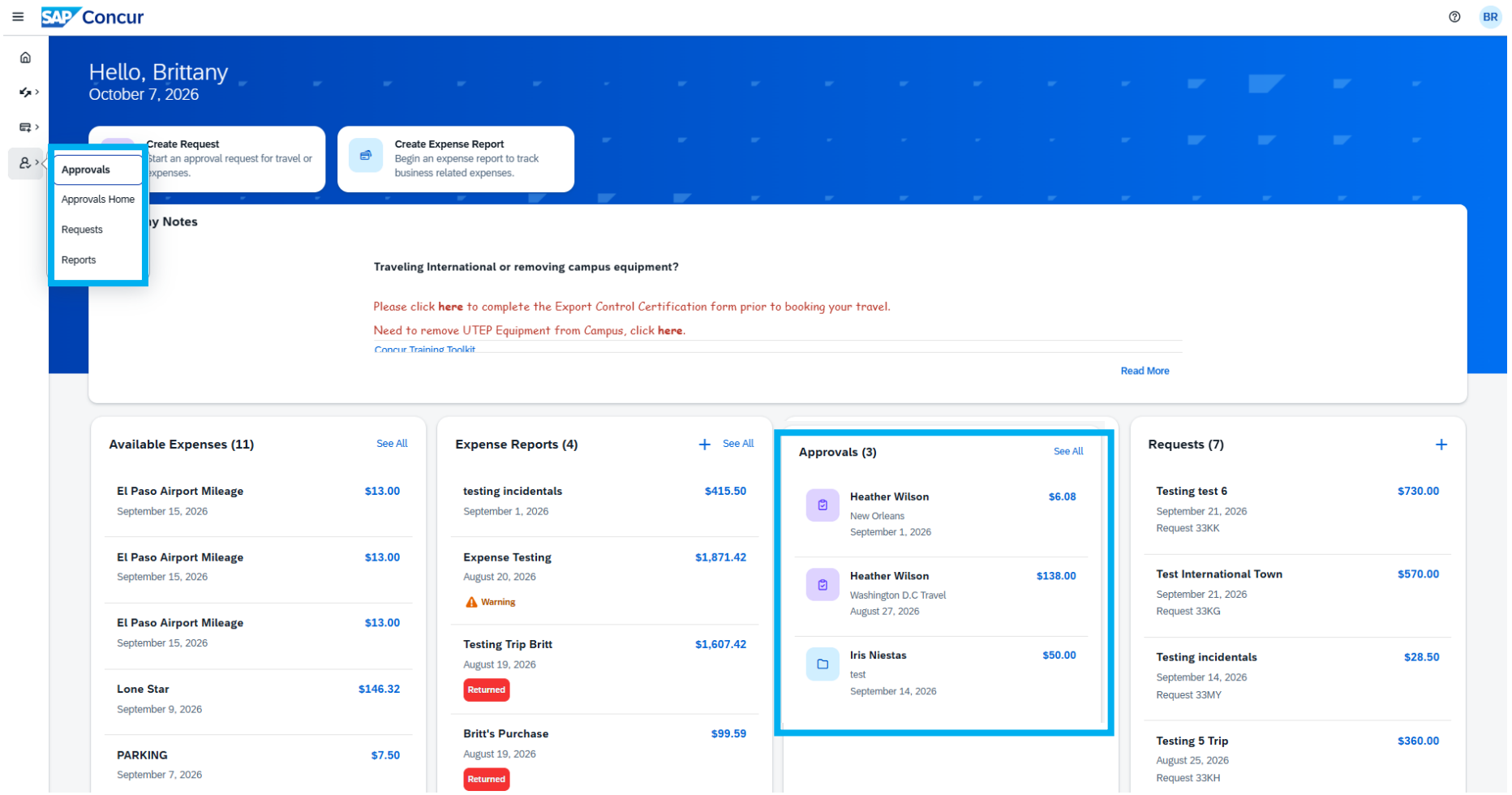


Approvers POV on Web Browsers

Approvers point of view, when reviewing approvals on the mobile app

Approvals

- Select **Approvals** from the left navigation menu, or select an item directly from the **Approvals** dashboard card on the home page.
- View and manage all travel requests and expense reports that are awaiting your review and approval.

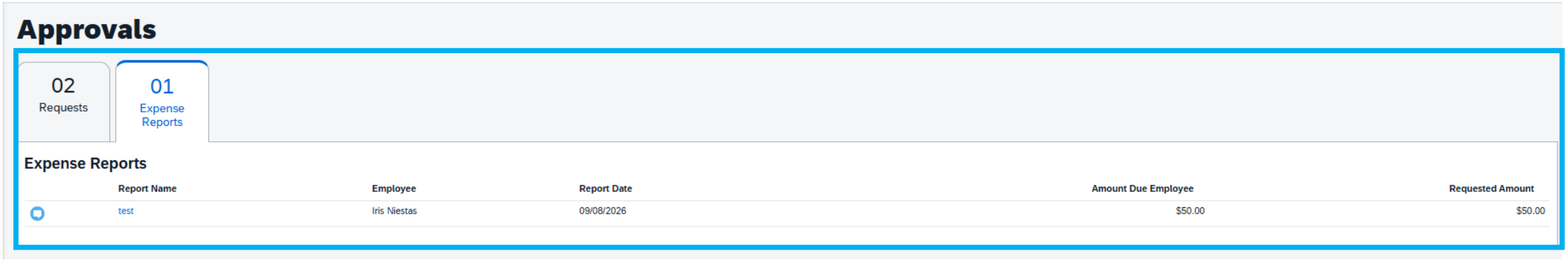


Approvers POV on Web Browsers

Approvers point of view, when reviewing approvals on the web broswers

Approvals Interface

- The Approvals interface is organized into separate tabs for **Travel Requests** and **Expense Reports**.
- Select a tab to view and manage items awaiting your review and approval.

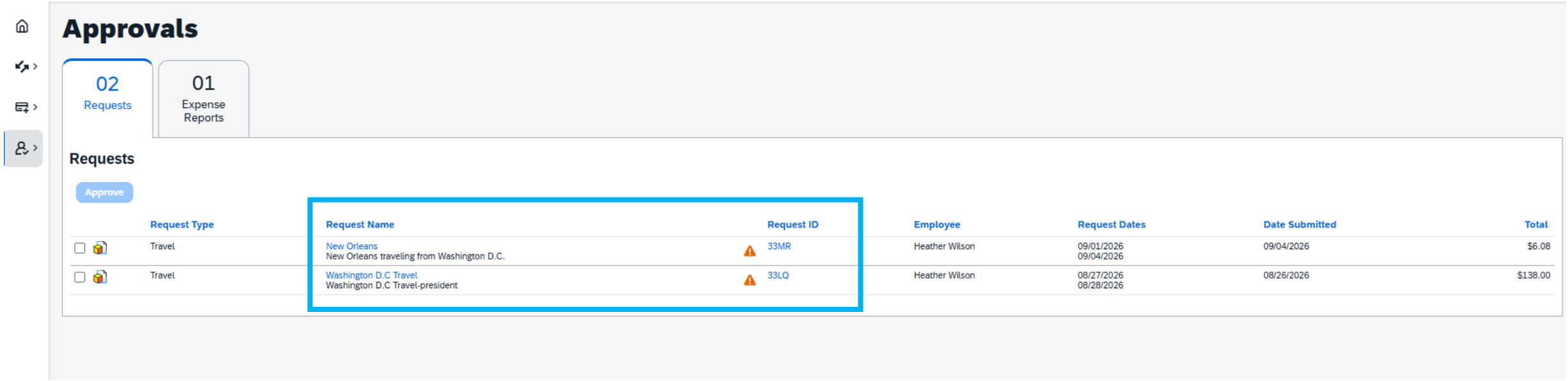


Approvers POV on Web Browsers

Approvers point of view on approving travel requests

Reviewing and Approving Travel Requests

- Select the **Request Name** or **Request ID** to open and review the travel request details.
- Review the request information, estimated expenses, and any supporting documentation before making a decision.
- For a quick approval, select one or more requests from the list and click **Approve** to approve them directly without opening each request individually.

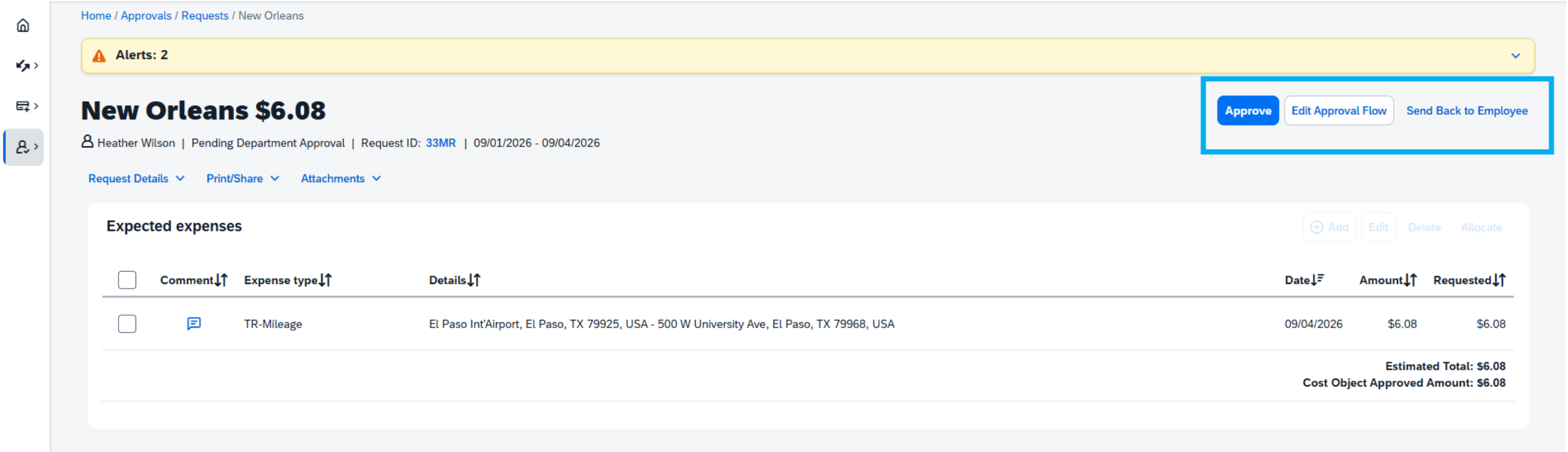


Approvers POV on Web Browsers

Approvers point of view on approving travel requests

Reviewing a Travel Request

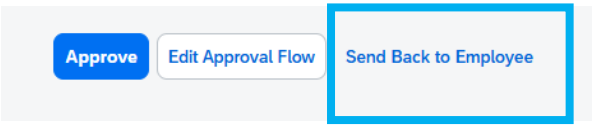
- Select the **Request Name** or **Request ID** to open the travel request.
- Review detailed request information, including trip details, estimated expenses, attachments, and approval status.
- From the request, you can **Approve** the request, **Edit Approval Flow** to modify the routing path, or **Send Back to Employee** if updates or additional information are needed.

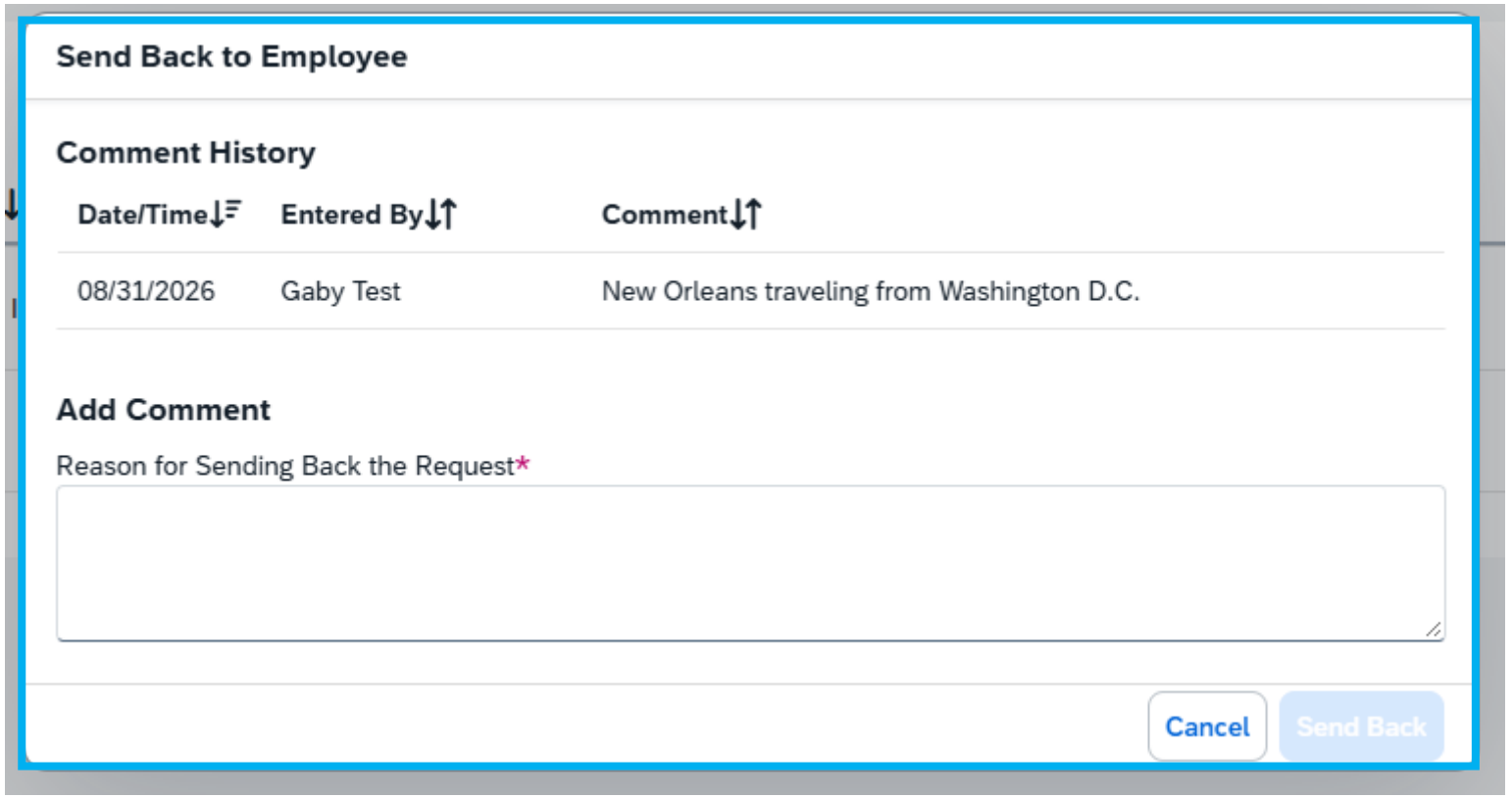


Approvers POV on Web Browsers

Approvers point of view on approving travel requests, sending back to employee

- Select **Send Back to Employee** if corrections are needed.
- Provide the reason for returning the request in the comments field.
- The employee will be notified and can review your comments, make the required changes, and resubmit the request.

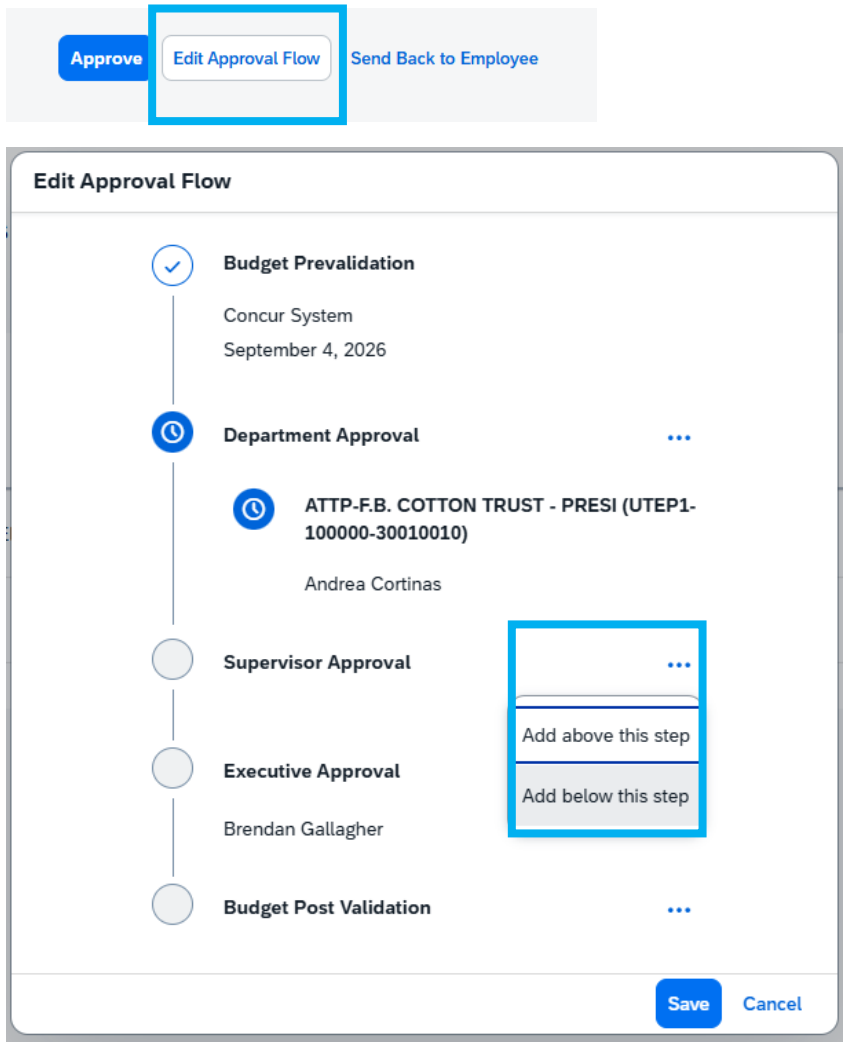


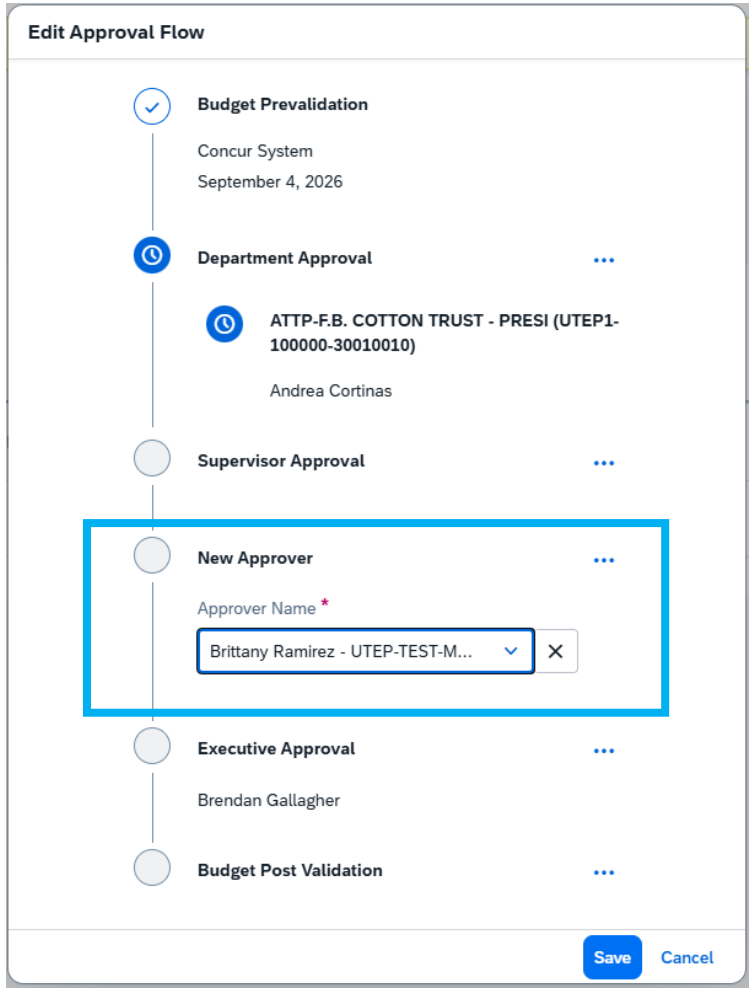


Approvers POV on Web Browsers

Approvers point of view on approving travel requests, editing the approval flow

- Select **Edit Approval Flow**.
- Click the **three dots (⋯)** and choose **Add Above This Step** or **Add Below This Step**.
- Search for and select the desired approver, then click **Save**.
- The new approver is added to the approval workflow in the specified location.

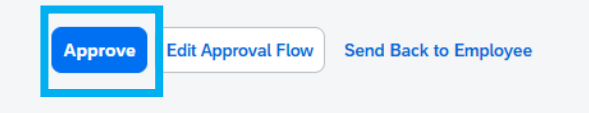


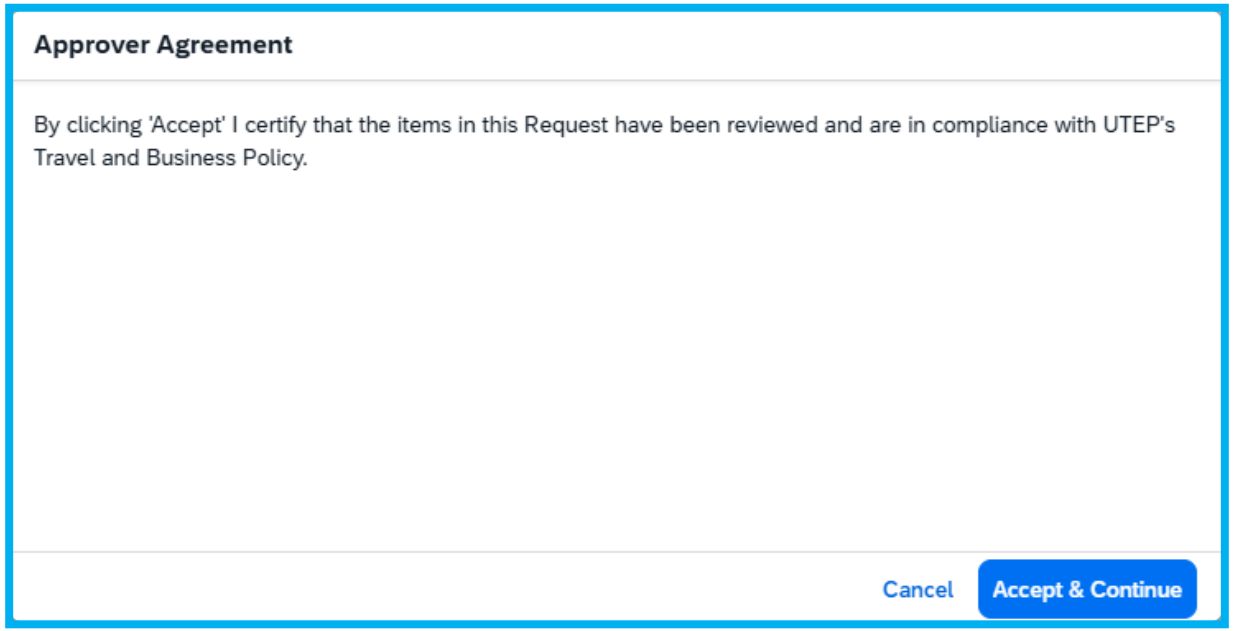


Approvers POV on Web Browsers

Approvers point of view on approving travel requests

- Click **Approve** to approve the request.
- When the **Approver Agreement** appears, select **Accept & Continue**.
- The request will proceed to the next step in the workflow.

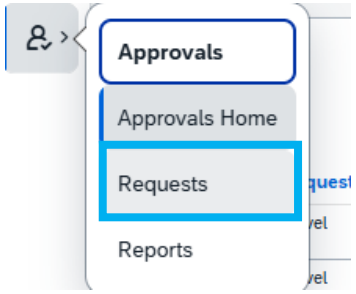


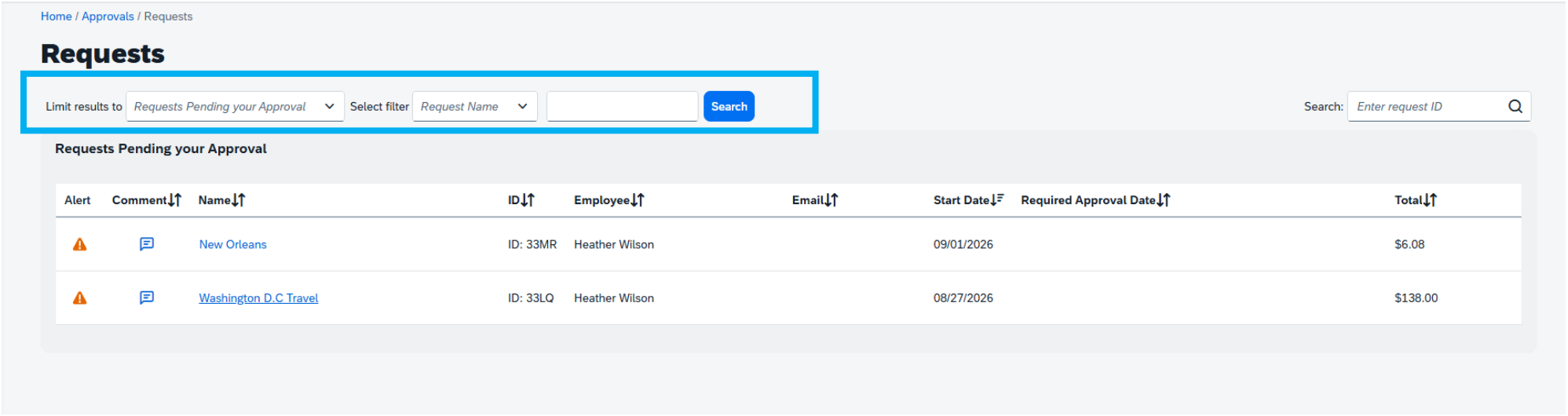


Approvers POV on Web Browsers

Approvers point of view, on how to see all travel requests

- Navigate to **Approvals > Requests**.
- This page displays both current and previously approved requests.
- Use it as a reference to review and track your approval history.



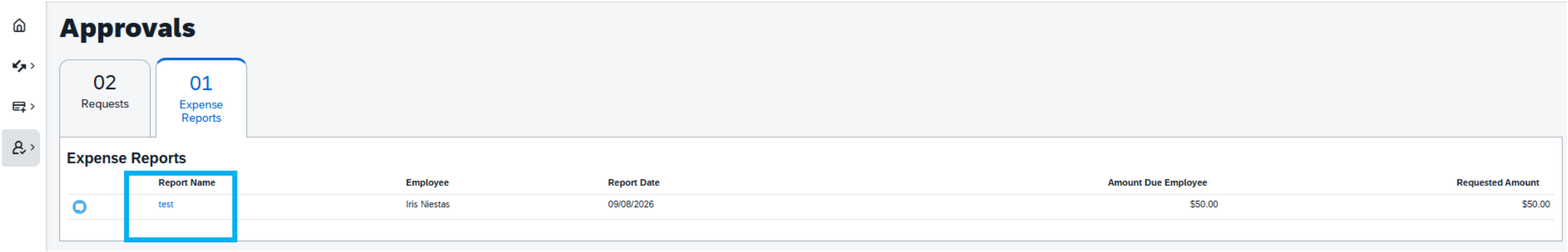


Approvers POV on Web Browsers – Expense Reports

Approvers point of view, when reviewing Expense Reports

Expense Report Approvals

- Select the **Expense Reports** tab to view expense reports awaiting your review.
- Click the **Report Name** to open the expense report and review the submitted expenses, receipts, and report details.
- The expense report details page provides the information needed to review the report and take appropriate approval actions.

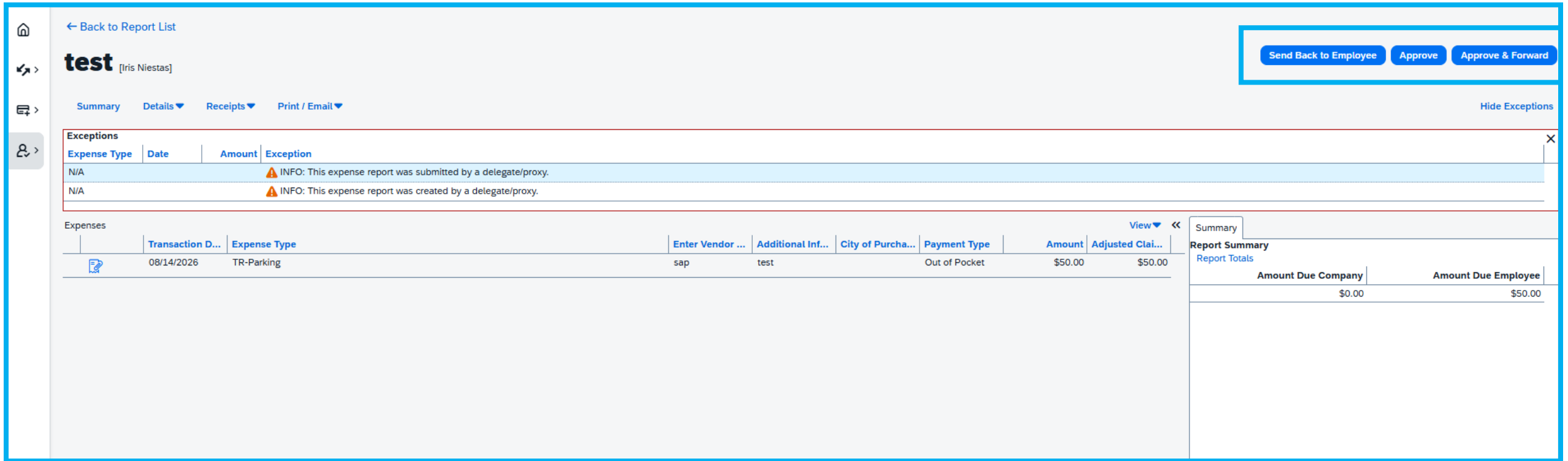


Approvers POV on Web Browsers

Approvers point of view, when reviewing Expense Reports

Expense Report Details

- Select the **Report Name** to open the expense report and review detailed report information.
- Review submitted expense entries, attached receipts, report totals, exceptions, and other supporting details.
- From this page, you can **Approve** the report, **Approve & Forward** it to another approver, or **Send Back to Employee** if corrections or additional information are needed.

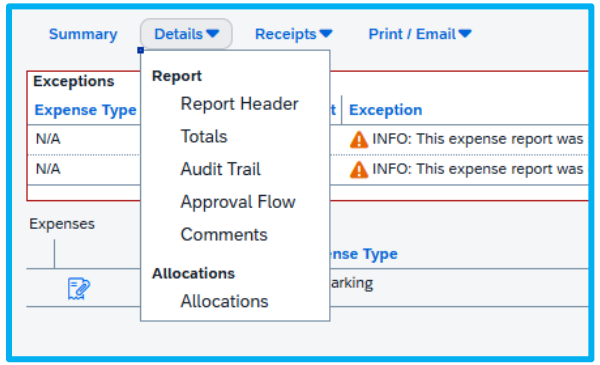


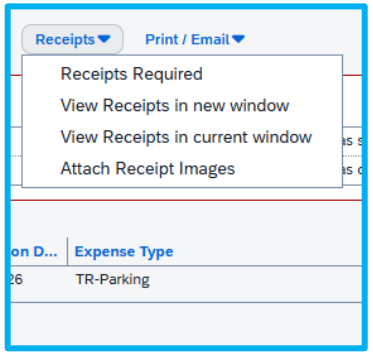
Approvers POV on Web Browsers

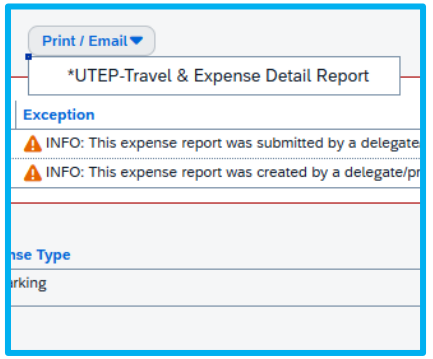
Approvers point of view, when reviewing Expense Reports

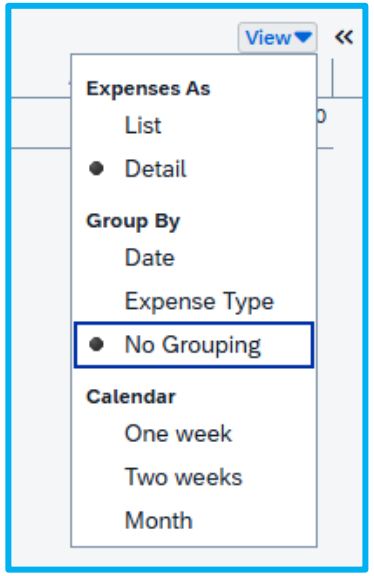
Additional Review Options

- **Details**: Access report information, totals, audit trail, approval flow, comments, and allocation details.
- **Receipts**: View attached receipts, open receipts in a separate window, or attach additional receipt images if needed.
- **Print/Email**: Generate a printable version of the expense report for review or recordkeeping.
- **View**: Customize how expenses are displayed by changing the layout, grouping expenses by category or date, and adjusting the reporting period displayed.







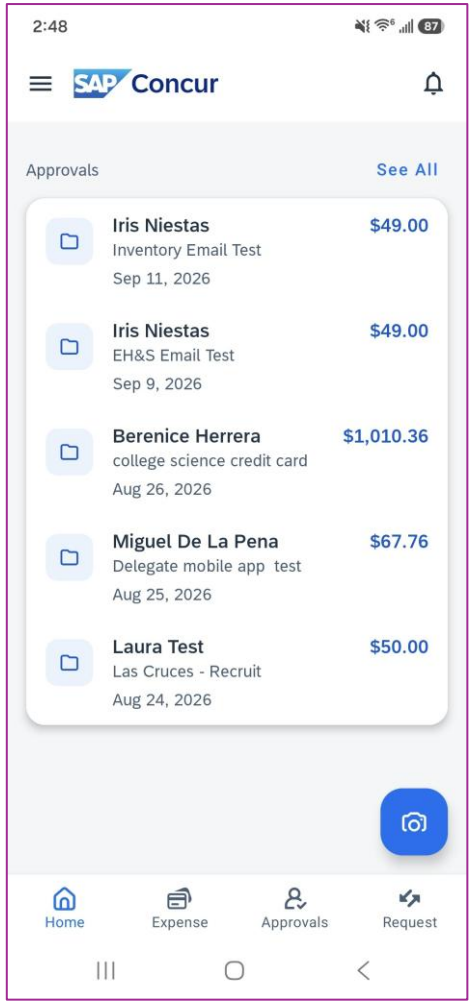


Approving on Mobile App

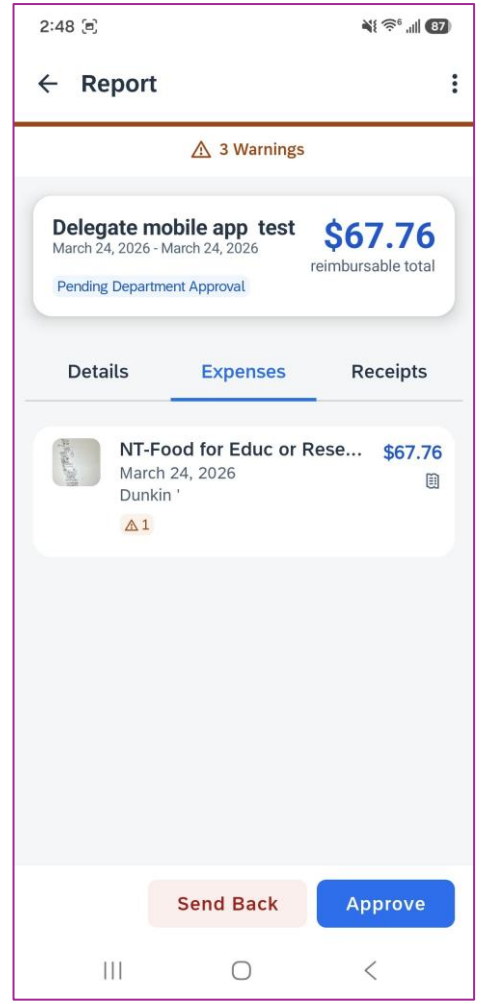
Reviewing and approving travel requests and expense reports on the go!

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app



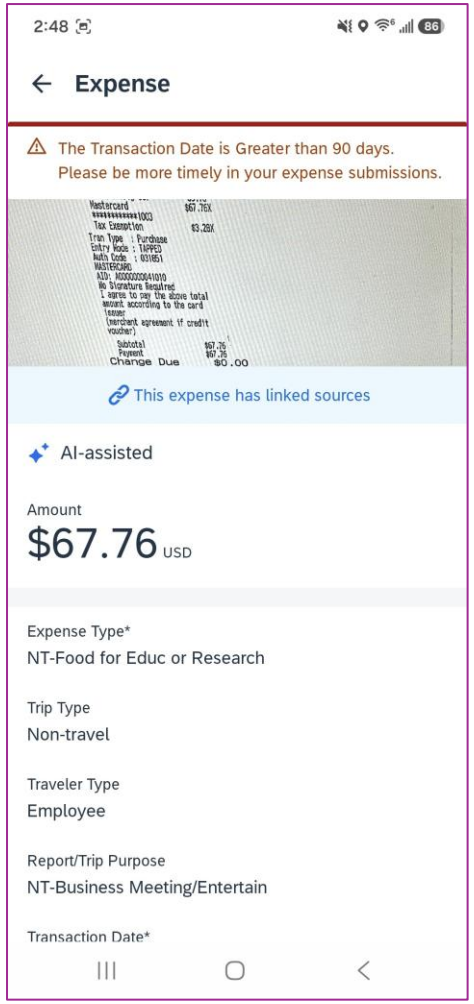
The home screen surfaces every approval awaiting your review.



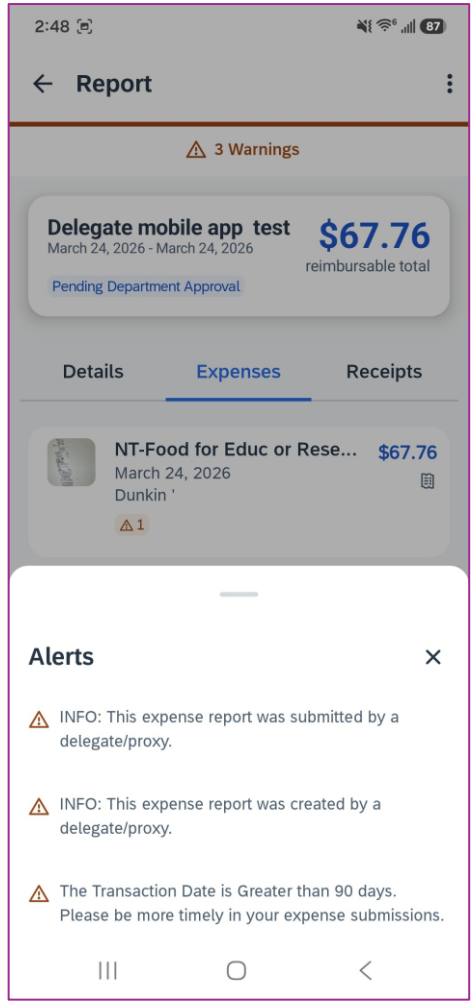
Open a request or report to review its details, expenses, and attached receipts.

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app



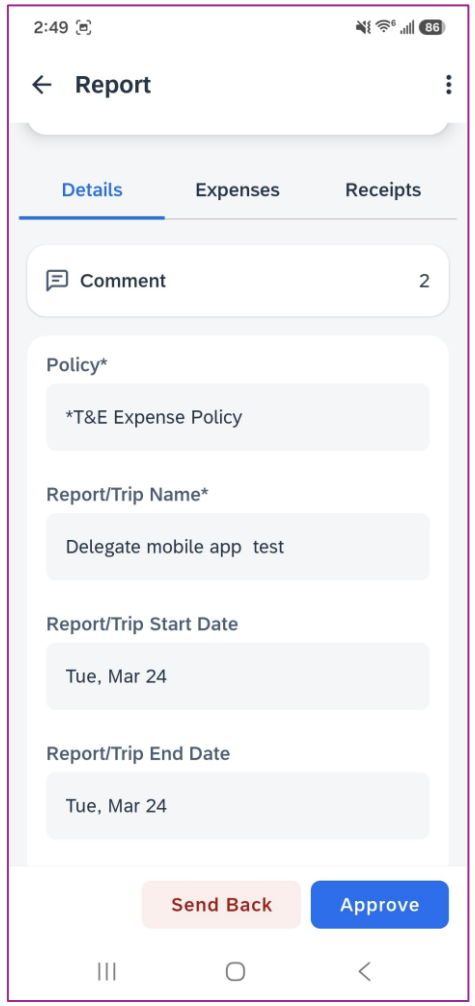
Open the Expenses tab and select a line item to see its full details and the uploaded receipt.



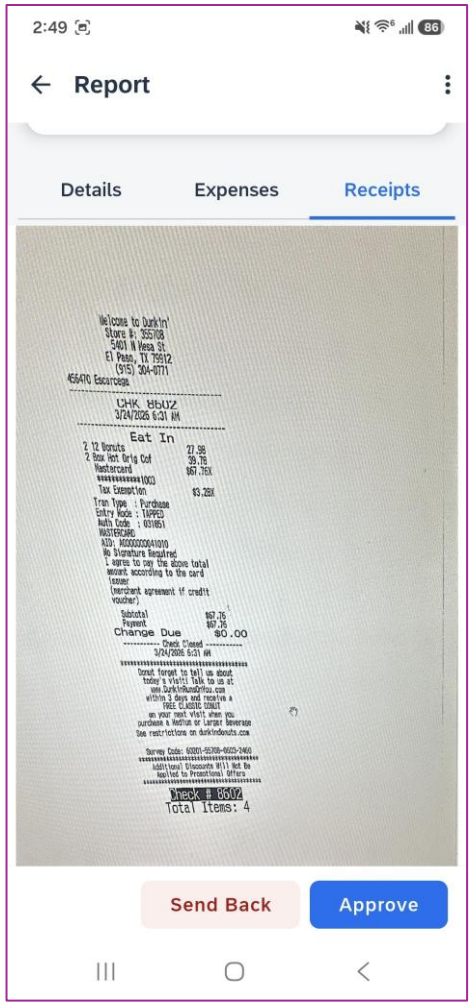
Tap the warnings banner to see each alert and the reason it was flagged.

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app



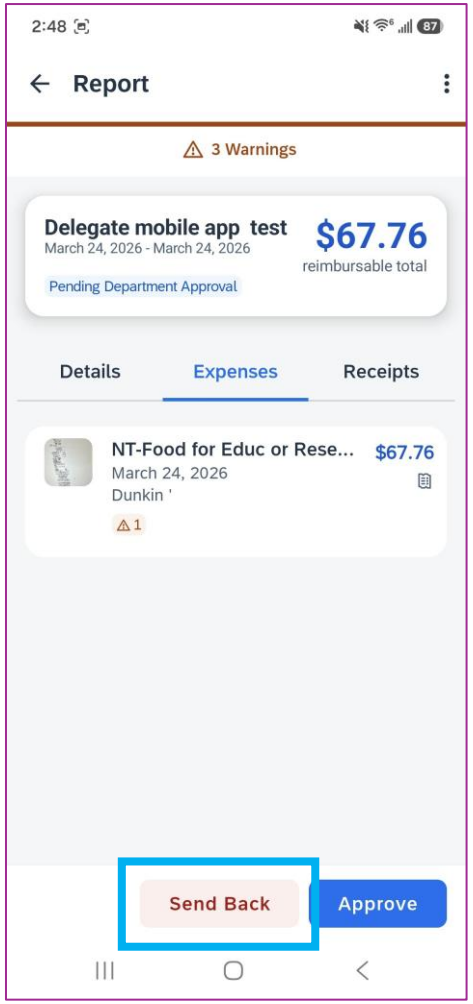
The Details tab shows the header information for the travel request or expense report.



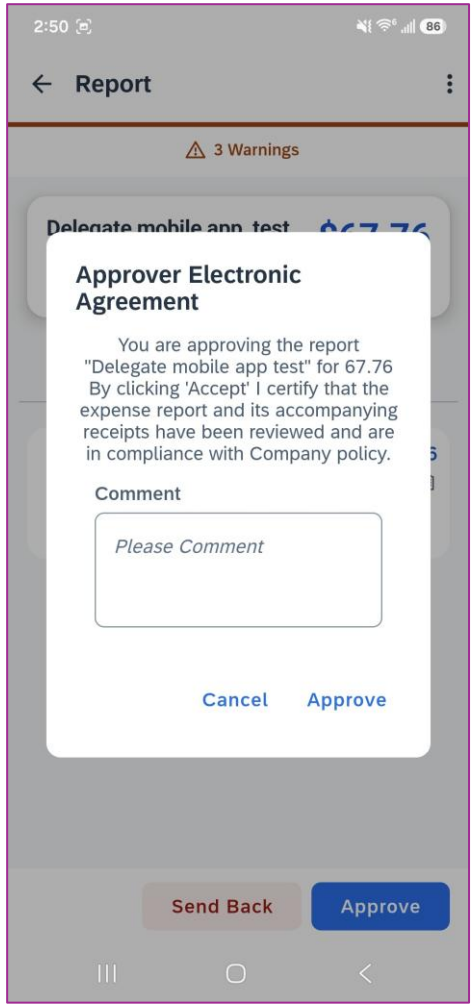
Open Receipts to view every receipt uploaded to the report.

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app



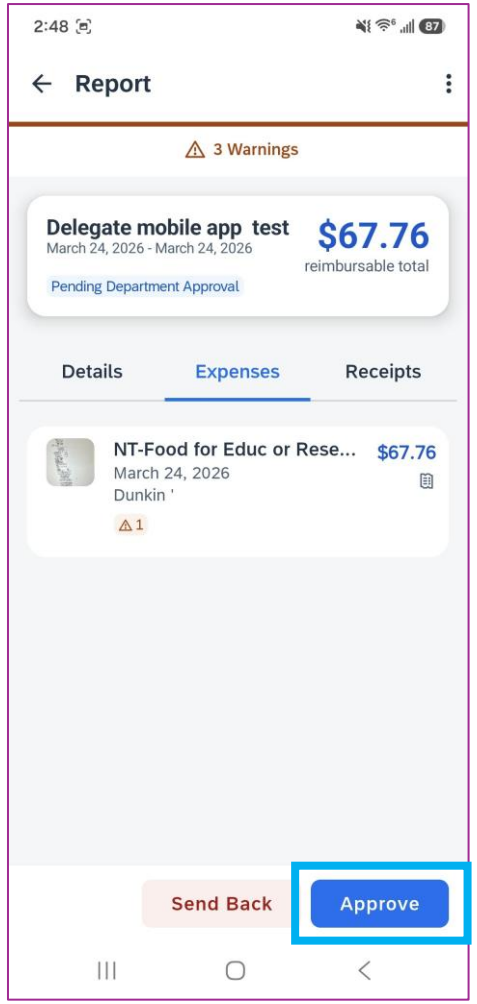
Choose whether to approve the request or expense report, or send it back.



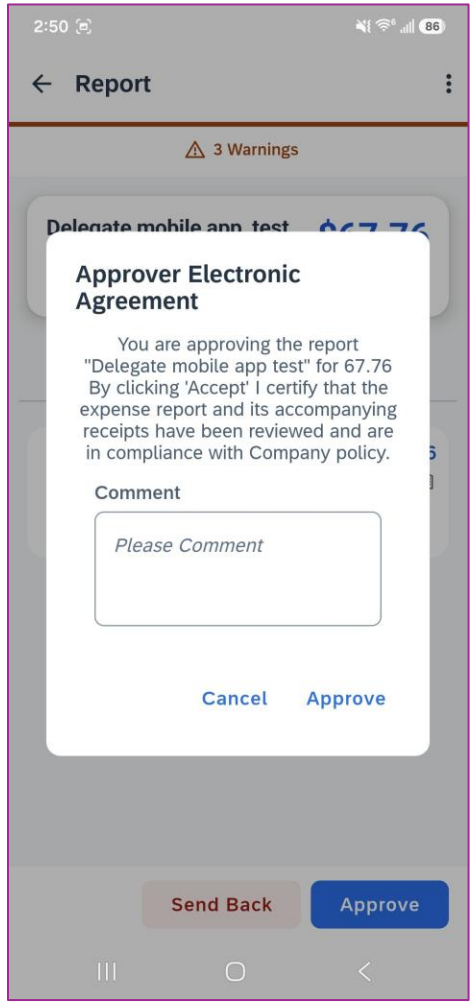
If you send it back, add a comment so the submitter knows what needs to change.

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app



Choose whether to approve the request or expense report, or send it back.

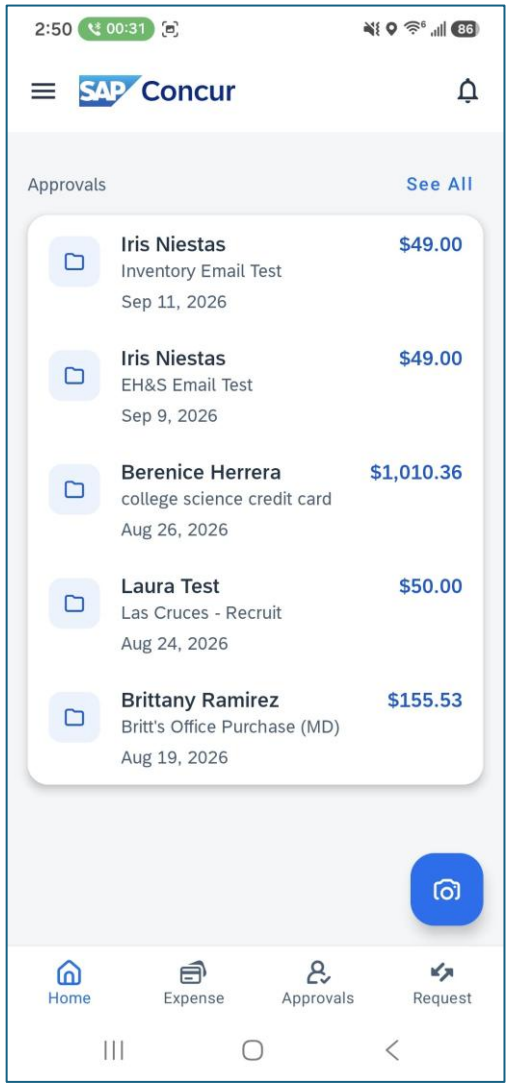


If you approve, you can still add an optional comment.

Approvers POV on Mobile App

Approvers point of view, when reviewing approvals on the mobile app

Once approved, the request or report clears from your queue.



Alternate Approvers

Approvers point of view, when reviewing approvals on the mobile app

Alternate Approvers have the same visibility and approval access as the Primary Approver for documents pending approval.

Before approving a document:

1. Review the **Document Detail Report** carefully.
2. Verify the **funding source(s)** charged on the document.
3. Approve **only** documents containing funding source(s) you are authorized to approve.

Important:

- Alternate Approvers are responsible for ensuring they have approval authority for all funding sources listed on the document prior to approving it.
- Funding source information can be found in the Travel Request or Expense Report Detailed Report, which identifies all funding sources used and the line items to which they were applied.



No Automatic Approval Skipping

Approval Workflows

Concur does not automatically approve multiple workflow steps when the same individual is assigned to more than one approval role. The approver must review and approve the document at each assigned step in the workflow.

Examples:

- The same individual is assigned as both the **Supervisor Approver** and **Funding Source Approver** on a Travel Request.
- The same individual is assigned as the **Funding Source Approver** for multiple funding sources on a Travel Request or Expense Report.
- The same individual is assigned as both the **Funding Source Approver** and **Executive Approver**.



Resources & Support

Help when you need it

Self-service resources

Training Website

Concur timelines and training materials

Quick Guides

Step-by-step help for common tasks

Videos

Concur 101 and Travel Request walkthroughs

FAQs

Updated answers to common questions

Personal support

Office Hours

Drop-in help after go-live, online or in person
Bring a live document to office hours for a walkthrough.

1:1 Support

Personalized help for high-volume users

Questions? Contact our team: travel@utep.edu

Thank you!

Concur was designed to help you spend less time managing travel and expenses and more time focusing on teaching, research, service, **and supporting our students**.

