This job aid covers the basics of approving travel requests/expense reports and p-card expense reports.

Logging into Concur

2. Click the Login button.
Username: [username]@fullerton.edu ||
Password: welcome

What Actions Can I Take as an Approver?

1. Approve: marks the request/report as approved and moves it to the next step in the workflow.
2. Send Back Request/Send Back to User: returns the request/report to the end user so they can make corrections. You will be asked to add a comment letting the end user know what to change.
3. Approve & Forward: if an additional approval outside the normal workflow is needed (e.g. you want the division office to approve the report), click Approve & Forward to select an additional approver who will need to approve the request/report before it moves to the next step in the workflow.

Approving Travel Requests

1. Click Approvals on the Concur homepage.
2. Click Requests and then select the request you want to review/approve.
3. Review the Request Header and Segments tabs for details about the trip.
4. Review each expense row by clicking on it to view additional details.
5. Click Attachments > View Documents in a New Window to review all attached documentation.
6. To easily view the chartfield(s) specified for each expense, click Print/Email > Request Printed Report. Scroll down to each expense and view the allocation.
7. Click Approve.

Approving Travel and P-Card Expense Reports

1. Click Approvals on the Concur homepage.
2. Click Reports and then select the report you want to review/approve.
3. Click Details > Report Header to view the details of the report such as travel dates or p-card billing cycle.
4. Click Details > Allocations to view the chartfield(s) that each expense is being charged to.
5. Review all of the expenses individually.
   A. Click on the carat icon (>) to the left of the expense to view the itemizations.
   B. Click on each row of the expense. The details appear on the right of the screen.
   C. Click Receipt Image to view the receipts/documentation that are associated with the expense.
6. Click Receipts > View Receipts in a New Window to view any additional documentation that was attached to the report.
7. Review any other items and add any optional comments under Details > Comments.
8. Click Approve.
## Concur Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>What Do I Need to Do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>!</td>
<td>Warning. There is a potential problem with your request/report.</td>
<td>Review the items that are showing this warning icon. You may need to alter your request/report before it can be submitted. Note that Travel Operations/Procurement may reject your request/report if you do not take appropriate action(s).</td>
</tr>
<tr>
<td>!</td>
<td>Alert. A problem must be fixed before you can submit the request/report.</td>
<td>Review the items that are showing this alert icon and follow the instructions to correct the error. You cannot submit the request/report until the error(s) are corrected.</td>
</tr>
<tr>
<td>!</td>
<td>Information. This information may suggest actions but they are not required before you submit the request/report.</td>
<td>Review the information. If appropriate, you can follow any recommended action(s). Note that Travel Operations/Procurement may reject your request/report if you do not take appropriate action(s).</td>
</tr>
</tbody>
</table>

## Need More Help?

**Concur Help**
- Help Menu in Concur
  - Training videos, articles, and PDFs.
- CTP Technical Support (No Cost)
  - Technical issues with booking your travel.
  - Contact CTP technical support at online@ctptravelservices.com or 877-727-5188 / 210-293-8689
- CTP Travel Agent ($10 fee)
  - Assist with booking travel or modifying your reservations.
  - Contact a CTP travel agent at 888-432-6676 or 210-293-8626

**Assistance with Booking Travel in Concur (CTP Travel Agency)**

**CSUF Help**
- Help with Access and Using Concur
  - General Support & Information
    - concur@fullerton.edu or 657-278-7777
    - http://finance.fullerton.edu/concur
- Help with CSUF Travel Policies
  - Travel Operations
    - travel@fullerton.edu
    - http://finance.fullerton.edu/controller/travel
- Help with CSUF P-Card Policies
  - Contracts & Procurement eBusiness at
    - ebusiness@fullerton.edu or 657-278-3758
    - http://finance.fullerton.edu/Procurement/PCard