



SAP Concur



Travel and Expense Reimbursement: Approvals

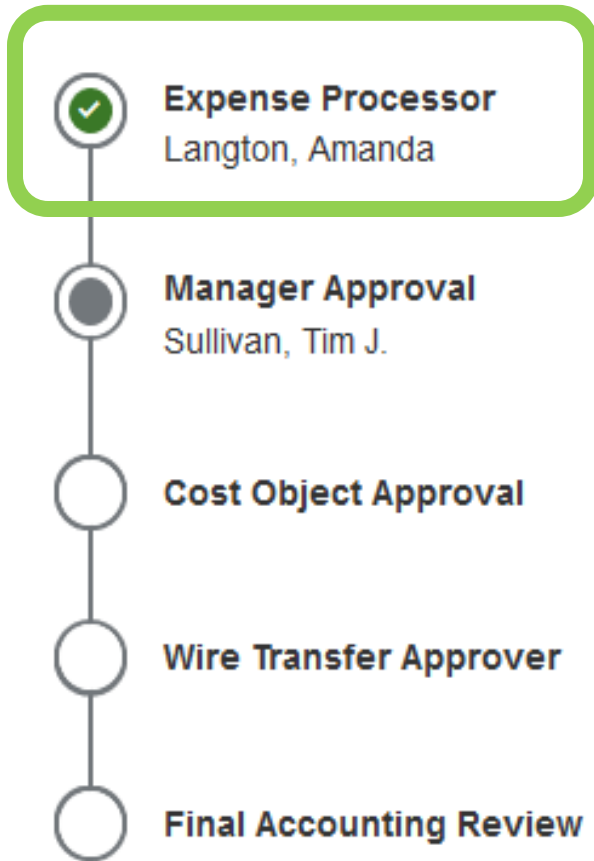
Approvers

Governing Policy: **Approval and Delegation of Authority**

- <https://carleton.ca/secretariat/wp-content/uploads/Approval-and-Delegation-of-Authority.pdf>
- appropriate approvals and delegation of authority required for various transactions and activities at the University
- applies to all members of the University community

Approval Flow

Approval Flow

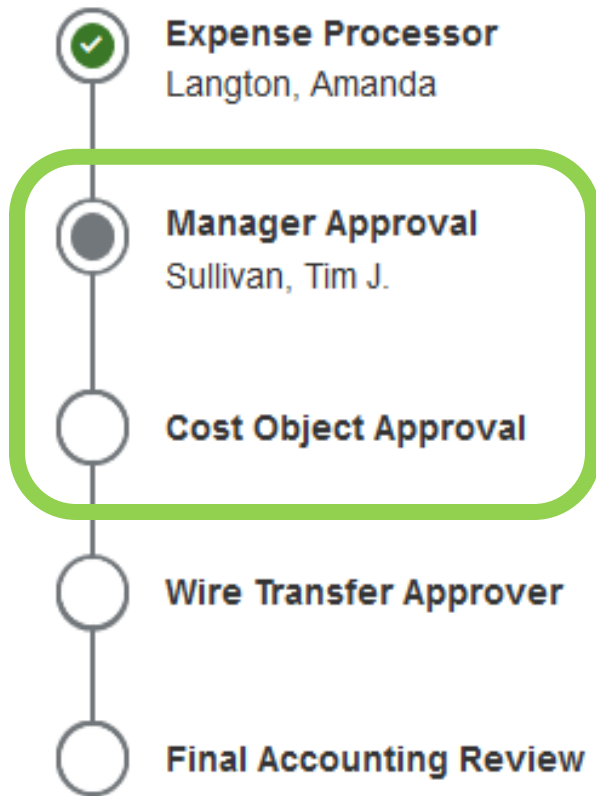


The Expense Processor step verifies that the report/request:

- adheres to Carleton's policies
- details provided match the receipts
- has relevant cash advances and requests attached

Approval Flow

Approval Flow



Manager Approval

The manager must be an individual in a one-up role or higher from the claimant.

Cost Object Approver

The financial approval authority/ties for the index/es that a given report has been charged to.

If the Approver is Both ...

If the manager is both the 'Manager Approval' and the 'Cost Object Approval', BOTH steps are approved in the 'Manager Approval' step.

SAP Concur Approvals Demo

Getting to Your REQUEST Approval Queue

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Help

Carleton UNIVERSITY
Hello, Tim

+ New

- 07 Required Approvals
- 03 Authorization Requests
- 00 Available Expenses
- 02 Open Reports
- 07 Cash Advances

SAP Concur | Requests | Travel | Expense

Approvals Home | Requests | Reports

Approvals

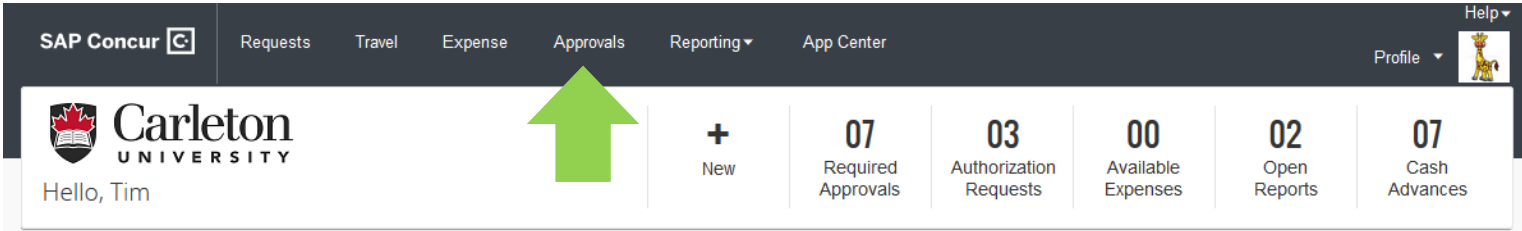
- 04 Requests
- 04 Expense Reports

Requests

Request Type	Request Name
Travel	Toronto October 2020
Travel	Test daily allowance
Travel	NC - Advance Example
Travel	NC - Approver COA view

How-to sheet on
carleton.ca/facts/travel

Getting to your EXPENSE REPORTS Approval Queue



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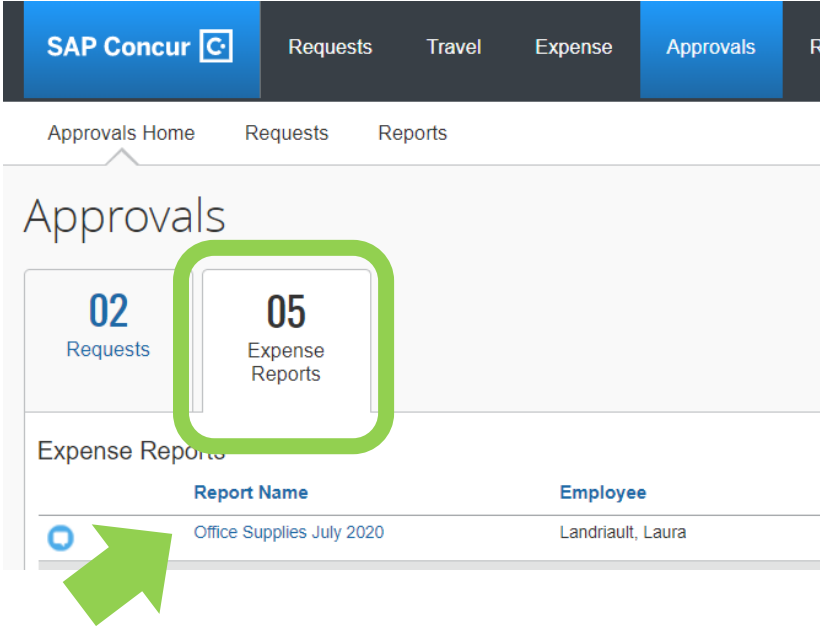
07 Required Approvals

03 Authorization Requests

00 Available Expenses

02 Open Reports

07 Cash Advances



SAP Concur | Requests | Travel | Expense | Approvals

Approvals Home | Requests | Reports

Approvals

02 Requests

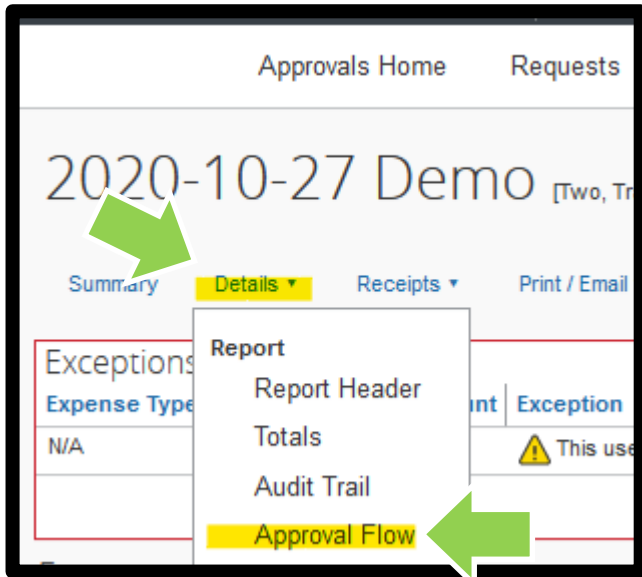
05 Expense Reports

Expense Reports

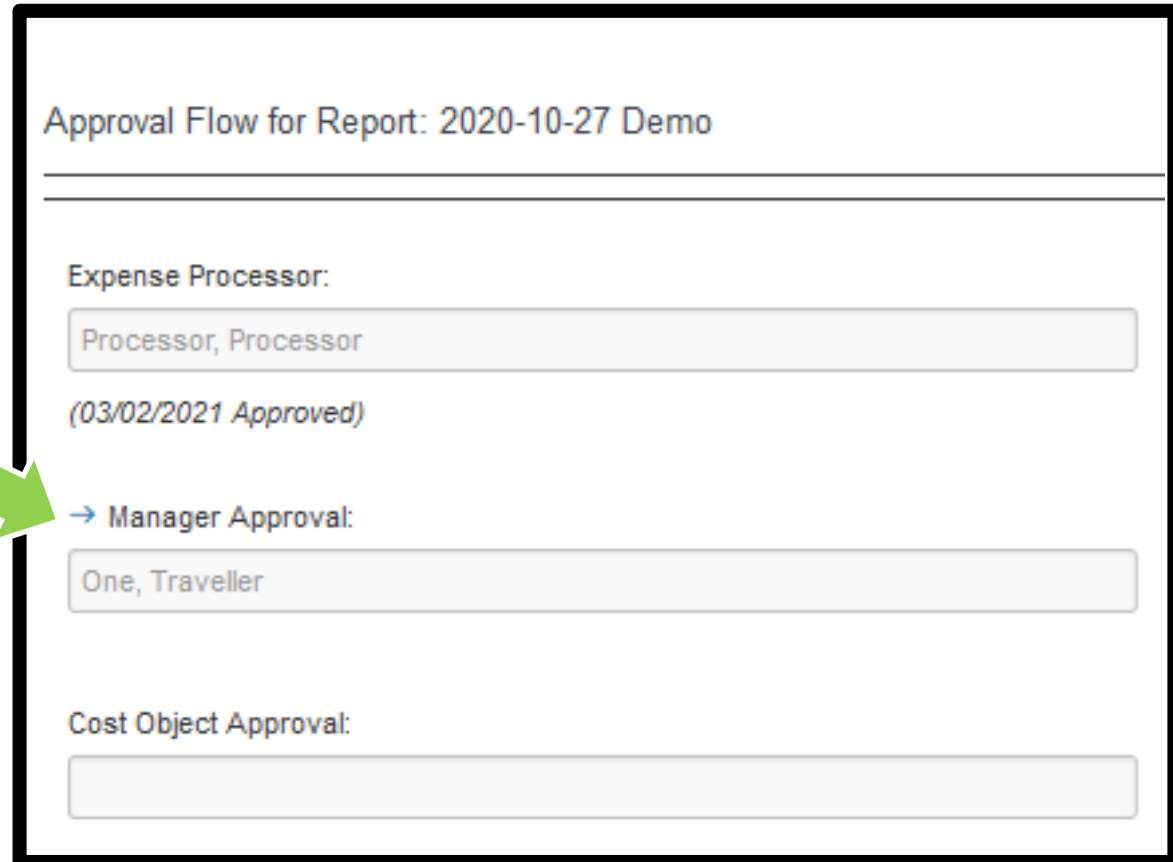
Report Name	Employee
Office Supplies July 2020	Landriault, Laura

How-to sheet on
carleton.ca/facts/travel

Checking your Current Approval Step



Arrow appears beside current workflow step.



IMPORTANT!

You may be responsible for more than one approval step.

How to Check Which Index is Being Charged

1.

Approvals Home Rec

2020-10-27 Demo

Summ **Details** Receipts Pri

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Allocations

Expenses

Date ▾

08/16/2020

2.

Allocations for Report: 2020-10-27 Demo

Expense List

Allocate Selected Expenses Clear Selections **Summary**

Select Group ▾

<input type="checkbox"/>	Date ▾	Expense T...	Group	Amount
<input type="checkbox"/>	08/16/2020	Computer E...	1	CAD 55.64
<input type="checkbox"/>	08/16/2020	Office Sup...	1	CAD 55.64


3.

Allocation Summary

Index	Activity Code	Amount
(D482) Business Operations		CAD 111.28

Knowledge Check: Poll

Answers are **anonymous**. We'll discuss the aggregated results.

 **Forms**
Poll: Anonymous | Results shared

Tell us which bit was the most confusing?

- approval flow
- current step
- checking allocation
- changing allocation

Submit

