HOW TO APPROVE REQUESTS AND CASH ADVANCES

If you are an immediate supervisor or a fund manager, you will receive an email notification when you will have a request that is pending your approval. You can click directly on the link located in the email notification in order to do the approval (in this case, your page will open directly within the request that requires your approval), or you can simply log in to the Home Page of Concur using the E-Travel user webpage url: http://www.uottawa.ca/financial-resources/etravel

When you log in, you will see your home page. The number of reports in your approval queue will be listed in Required Approvals.

You can access your approval queue in three ways:

- **Required Approvals** under My Tasks
- **Required Approvals** on the task bar
- Directly on the Approvals heading
Once you are within the Approval module, you will notice two tabs; Request and Expense Reports. Click the title of the request (in blue) you would like to review and approve.

**Note:** If you clicked directly on the link from the email notification, you will be automatically routed to the Request that requires your approval.

The screen will show you all the expenses that the traveller is planning to incur. The name of the traveller is showing at the top of the screen, where the request ID appears. The amount requested is at the top right corner. Review this request carefully (See Annexe A).
Once you have finished reviewing, you can:

1. If everything is fine, click on the **Approve** button.
2. If you can’t approve this request because you notice an error, click on **Send Back Request**.
3. If you believe this request should be approved by someone else, you can click on the **Approve & Forward** button, this way, you will be able to select the name of this person. The document will then appear in the approval queue of that person before being automatically sent to the compliance officer.
Annexe A – Request details
There are different tabs within the request that requires your attention.

Request 33DF [Angéil, René]

Request Name: Approbation d’une demande
Relationship with Research Project: guide approbation d’une demande

Request Header
Here is where you can review the trip type, relationship with the research project; cash advance requests and the FOAP.

Segments
Give an estimate of the expenses that the traveller plans to incur.

Expense summary
Just like the segments, this tab will allow you to review each expense that the traveller plans to incur during his trip.

Approval Flow
Allows you to verify that the person that should approve this request are properly selected by the traveller.

Audit Trail
Allows you to know all the steps that had been taken within this request.

Attachments
If the traveller attached a document to his request, per example a conference program, you can consult the attachment by clicking Attachments, then Check Documents.

You can also print or email this request if necessary.

Exceptions message
In order to review the exceptions and warning messages, you can click on each individual line where the triangle or the circle appears.