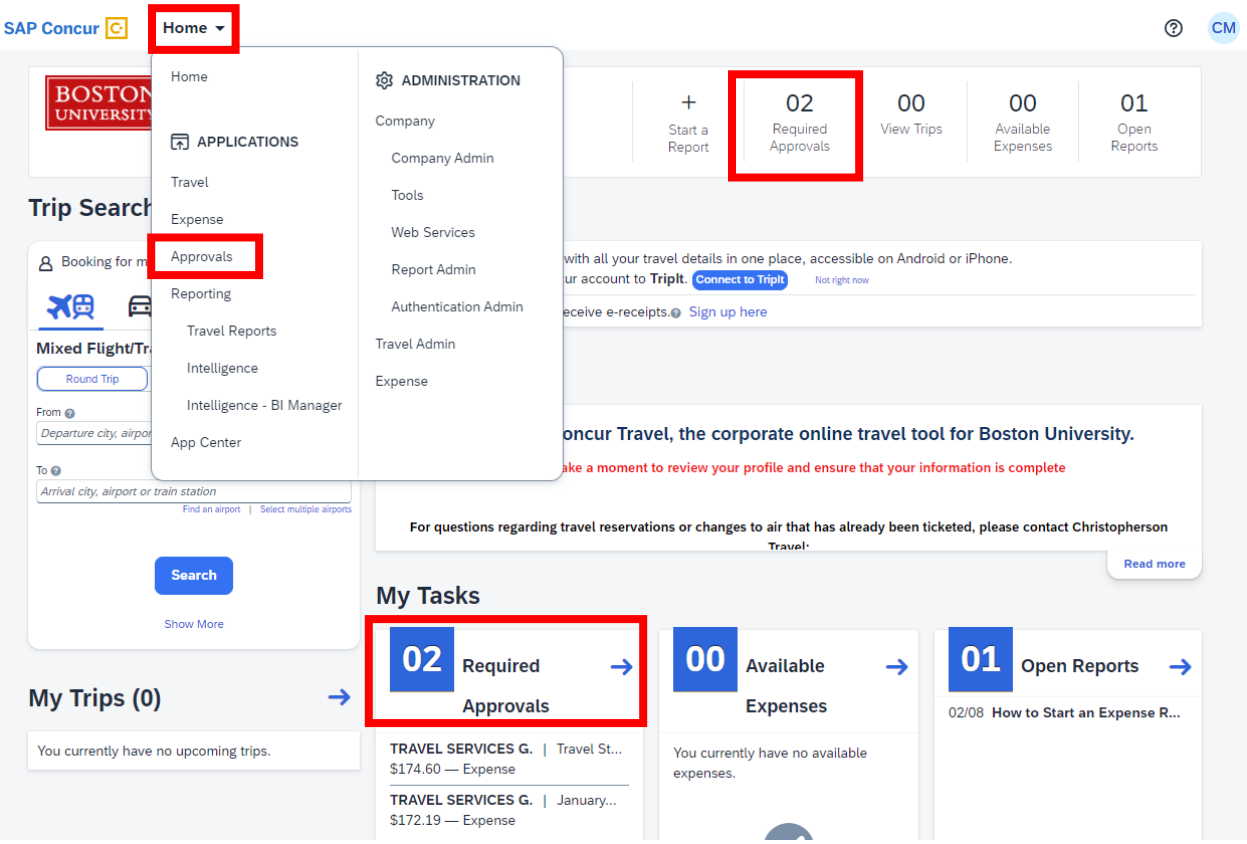
How to Approve Expense Reports

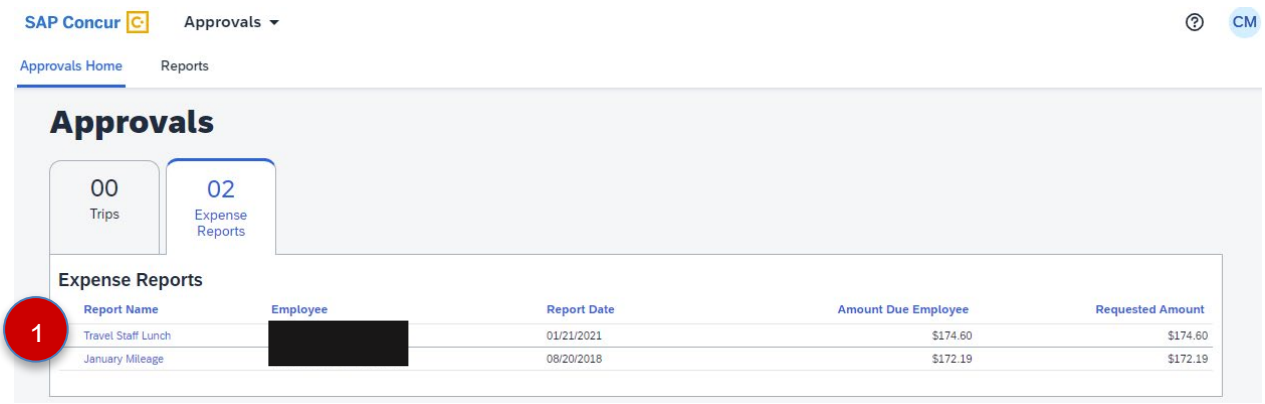
This Quick Reference Guide demonstrates how Expense Approvers access, review, and approve expense reports in the Concur system.

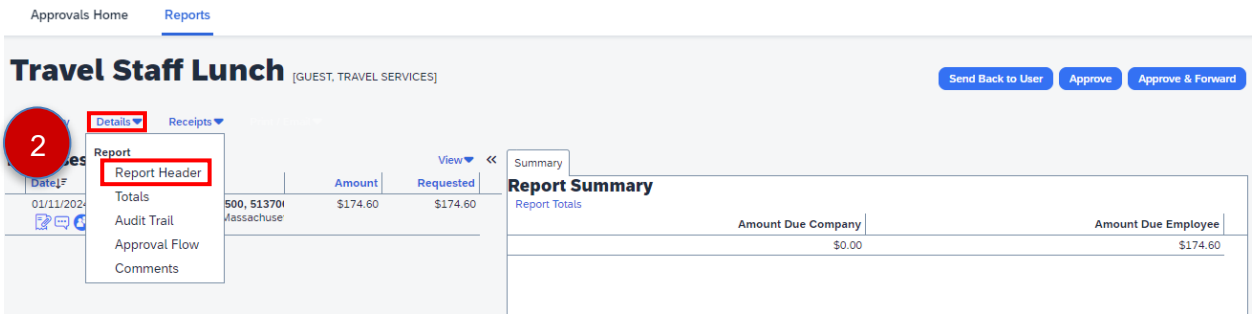
From the Concur home screen, Reports pending approval can be found in three places: home dropdown tab, the upper/middle part of the screen "required approvals" tab, and under My Tasks at the bottom of the page.



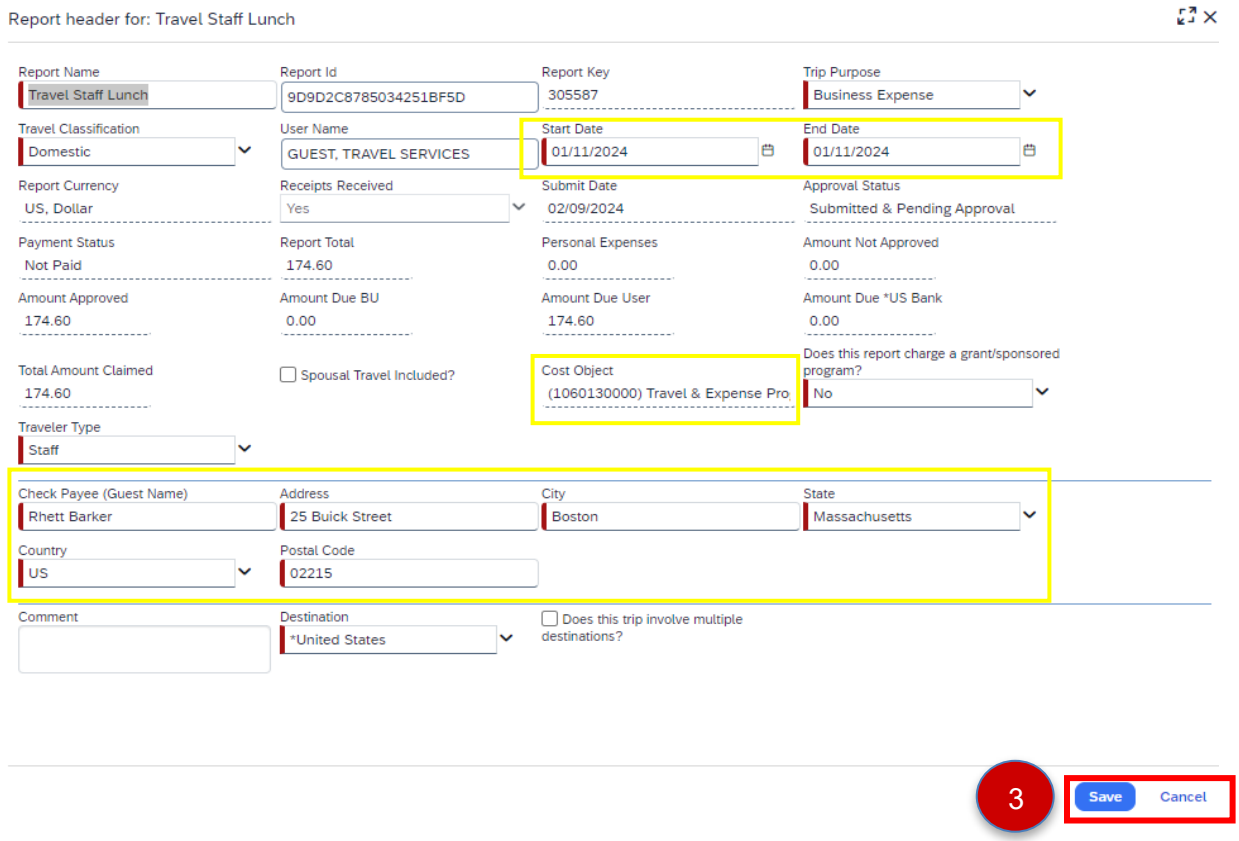
Select one of options- this will display the available reports to approve.

1	Select and click the Report Name to begin review
2	Click on the Details drop down menu and Select **Report Header** to review the trip details
3	Click Save or Cancel to exit Report Header screen



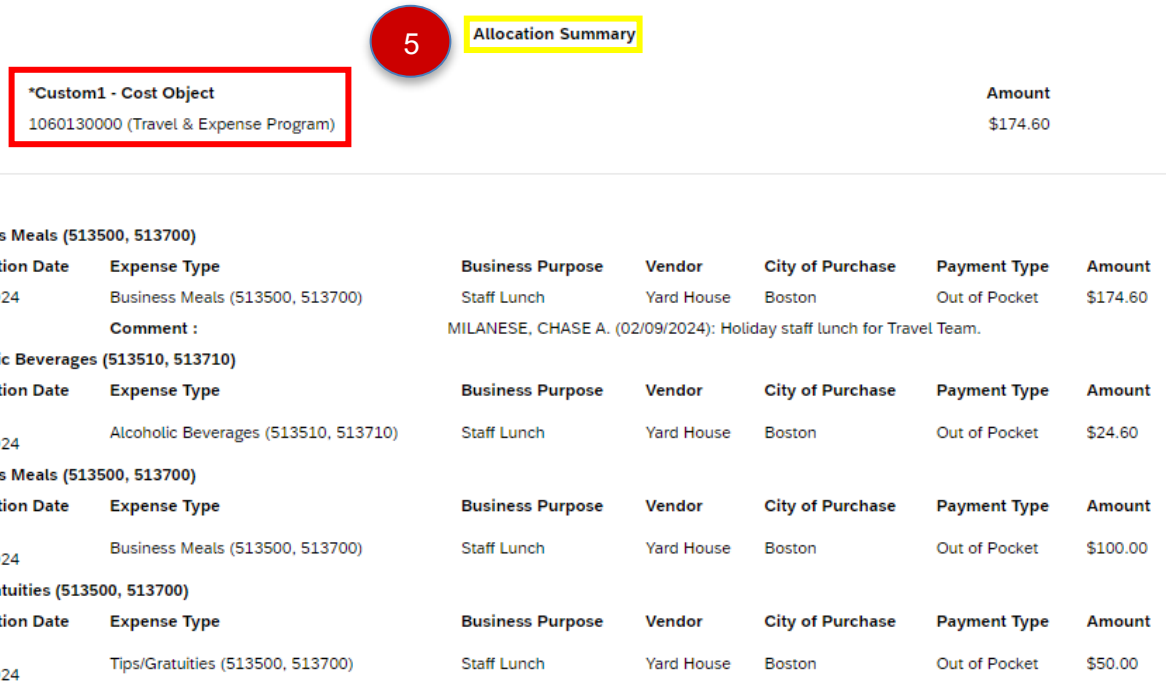


In the **Report Header**, you can review the **account being charged**, and the **start date** and **end date** of the trip. If this is a reimbursement for a guest or student, you should confirm **check payee and address details**.

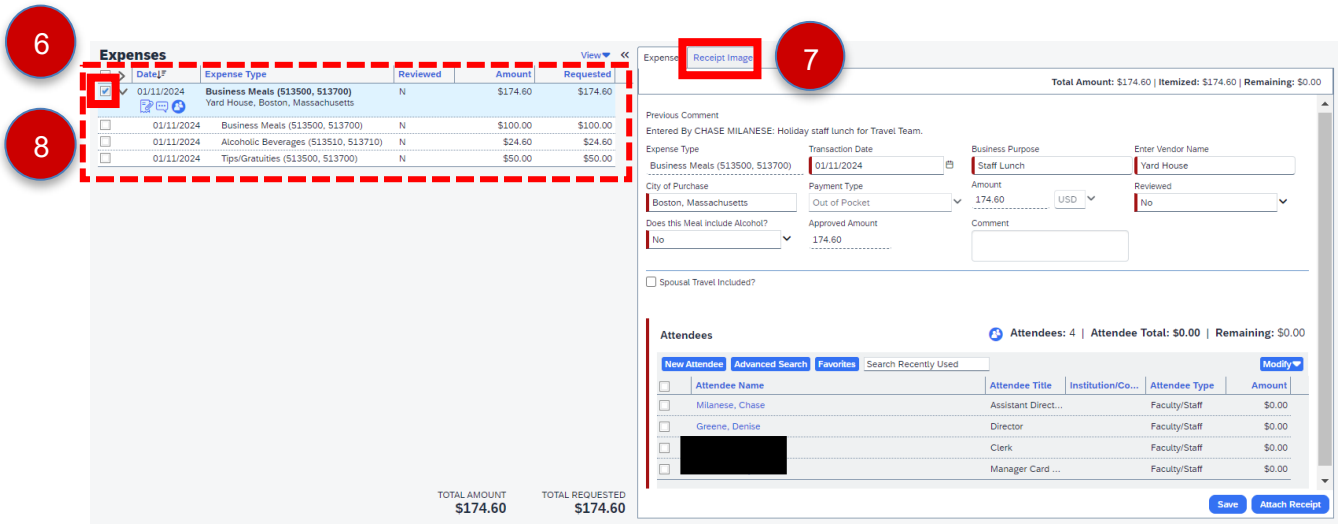


4	Click on the **Print/Email** drop down menu and select **BU Detailed Report**
5	Review the **Allocation Summary** and then exit the window

The first section in the BU Detailed Report will be the information contained in the report header; scroll past this to the Allocation Summary. This is the fastest way to view each of the allocations contained in the report.

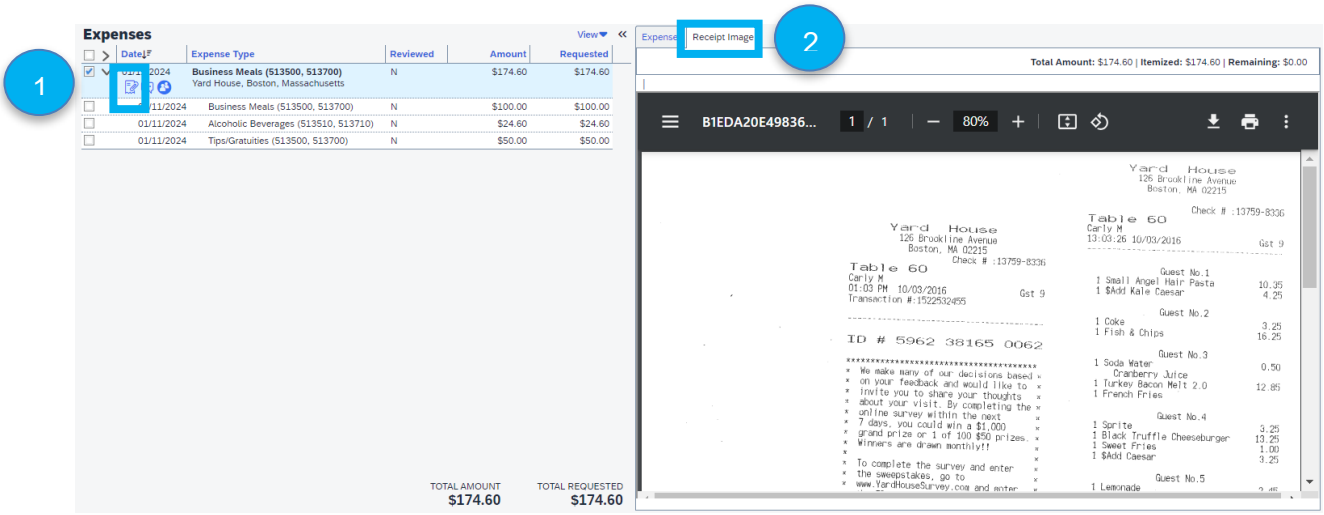


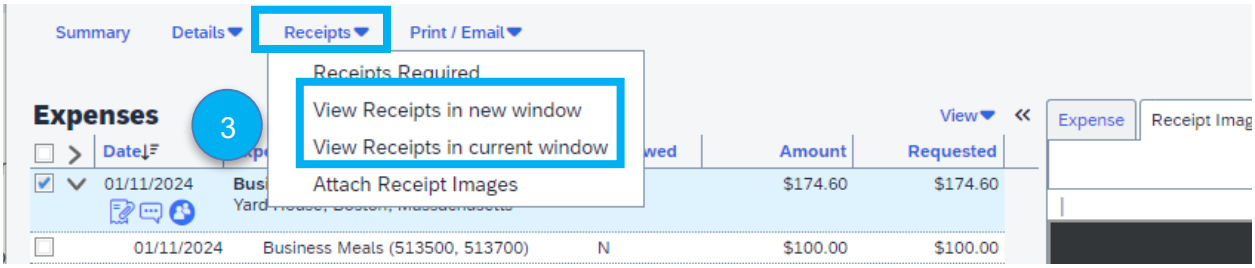
6	On the left hand side, click on each **Expenses** line item you would like to review. *Note: If there are multiple line items in the **Expenses** list you can sort by **Date**, **Expense Type**, and **Amount** by clicking on the corresponding column header*
7	After reviewing the **Expense** entry level information, review the **Receipt** image*
7b	Review attached image and repeat process for all **Expenses** $25.00 and greater
8	Expand expenses by selecting the radial to the left to view itemizations *Note: All meals or expenses containing alcohol must be itemized.*



***Receipts can be reviewed in three ways:**

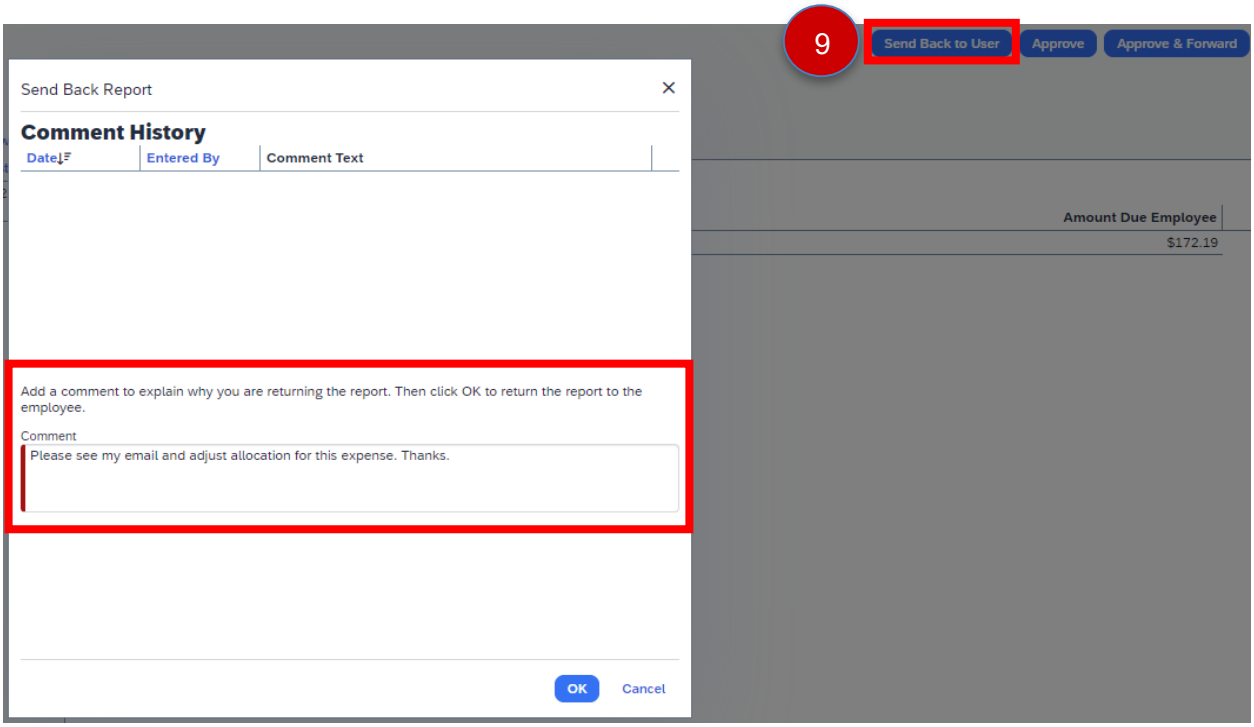
1- **Hovering over the receipt icon to the left of the expense**
2- **Selecting the individual expense and hitting the Receipt Image tab to the left of the Expense tab**
3- **Utilizing the Receipt drop down menu to either View Receipts in a new window or the same window**

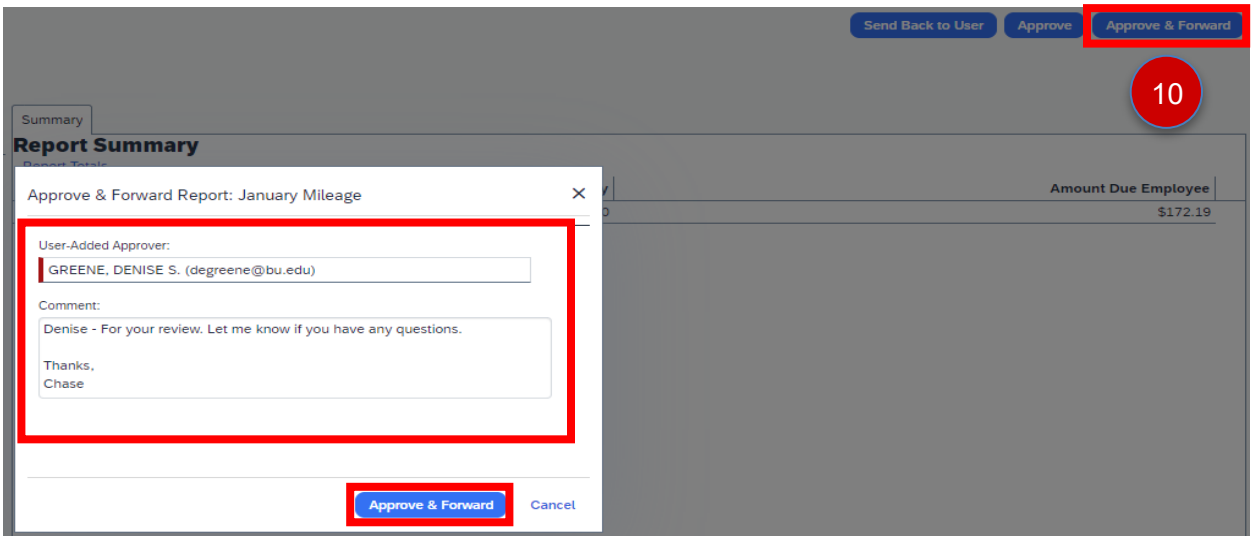




Once you are finished reviewing the report, you will approve the report or reject it.
As an Approver you are also able to make changes to a report's Cost Center or allocate individual expense items.
To do this, please refer to the How to Allocate Quick Reference Guide

9	If Changes need to be made click **Send Back to User** button**.** Enter a detailed **Send Back Comment** and click **OK** button at bottom of screen. You have sent the report back to the creation profile for the **Submitter** to make changes and resubmit.
10	If the Expense Report passes audit but you would like to add another Approver to the workflow, hit **Approve and Forward**. The expense report will move on to another approver prior to reaching Accounting Review.





11	**If the Expense Report passes audit click the Approve button. You have now moved the report on to Accounting Review, the final step before it is sent for payment.**