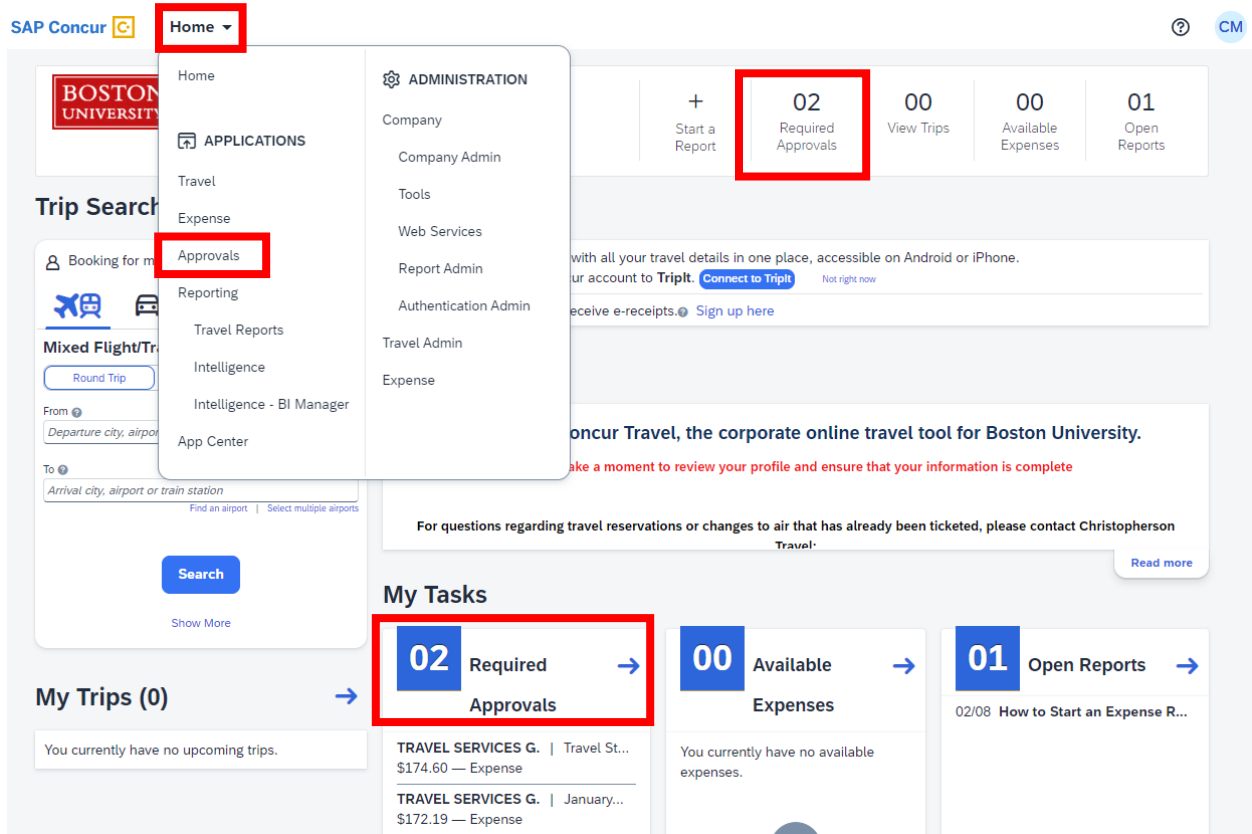


How to Approve Expense Reports

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

Approvals

00 Trips

02 Expense Reports

Expense Reports

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Travel Staff Lunch	[REDACTED]	01/21/2021	\$174.60	\$174.60
January Mileage	[REDACTED]	08/20/2018	\$172.19	\$172.19

Travel Staff Lunch [GUEST, TRAVEL SERVICES]

[Send Back to User](#) [Approve](#) [Approve & Forward](#)

2

Details ▾ Receipts ▾

Report

Report Header

Date	Amount	Requested
01/11/2024	500, 51370	\$174.60

Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$174.60

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**.

Report header for: Travel Staff Lunch

Report Name Travel Staff Lunch	Report Id 9D9D2C8785034251BF5D	Report Key 305587	Trip Purpose Business Expense
Travel Classification Domestic	User Name GUEST, TRAVEL SERVICES	Start Date 01/11/2024	End Date 01/11/2024
Report Currency US, Dollar	Receipts Received Yes	Submit Date 02/09/2024	Approval Status Submitted & Pending Approval
Payment Status Not Paid	Report Total 174.60	Personal Expenses 0.00	Amount Not Approved 0.00
Amount Approved 174.60	Amount Due BU 0.00	Amount Due User 174.60	Amount Due *US Bank 0.00
Total Amount Claimed 174.60	<input type="checkbox"/> Spousal Travel Included?	Cost Object (1060130000) Travel & Expense Pro	Does this report charge a grant/sponsored program? No
Traveler Type Staff	Check Payee (Guest Name) Rhett Barker		
	Address 25 Buick Street		
	City Boston		State Massachusetts
	Country US		
	Postal Code 02215		
Comment	Destination *United States	<input type="checkbox"/> Does this trip involve multiple destinations?	

3 [Save](#) [Cancel](#)

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

Travel Staff Lunch [GUEST, TRAVEL SERVICES] Send Back to User Approve

Summary Details **4** Print / Email BU Detailed Report

Expenses View << Summary

<input type="checkbox"/>	Date	Expense Type	Reviewed	Amount	Requested
<input type="checkbox"/>	01/11/2024	Business Meals (513500, 513700) Yard House, Boston, Massachusetts	N	\$174.60	\$174.60

Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$174.60

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.

5 Allocation Summary

*Custom1 - Cost Object	Amount
1060130000 (Travel & Expense Program)	\$174.60

Business Meals (513500, 513700)

Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
01/11/2024	Business Meals (513500, 513700)	Staff Lunch	Yard House	Boston	Out of Pocket	\$174.60

Comment : MILANESE, CHASE A. (02/09/2024): Holiday staff lunch for Travel Team.

Alcoholic Beverages (513510, 513710)

Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
01/11/2024	Alcoholic Beverages (513510, 513710)	Staff Lunch	Yard House	Boston	Out of Pocket	\$24.60

Business Meals (513500, 513700)

Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
01/11/2024	Business Meals (513500, 513700)	Staff Lunch	Yard House	Boston	Out of Pocket	\$100.00

Tips/Gratuities (513500, 513700)

Transaction Date	Expense Type	Business Purpose	Vendor	City of Purchase	Payment Type	Amount
01/11/2024	Tips/Gratuities (513500, 513700)	Staff Lunch	Yard House	Boston	Out of Pocket	\$50.00

6	On the left hand side, click on each Expenses line item you would like to review. <i>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</i>
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 <i>Note: All meals or expenses containing alcohol must be itemized.</i>

Expenses

Date	Expense Type	Reviewed	Amount	Requested
01/11/2024	Business Meals (513500, 513700) Yard House, Boston, Massachusetts	N	\$174.60	\$174.60
01/11/2024	Business Meals (513500, 513700)	N	\$100.00	\$100.00
01/11/2024	Alcoholic Beverages (513510, 513710)	N	\$24.60	\$24.60
01/11/2024	Tips/Gratuities (513500, 513700)	N	\$50.00	\$50.00

TOTAL AMOUNT \$174.60 TOTAL REQUESTED \$174.60

Expense: Receipt Image

Total Amount: \$174.60 | Itemized: \$174.60 | Remaining: \$0.00

Expense Type: Business Meals (513500, 513700) Transaction Date: 01/11/2024 Business Purpose: Staff Lunch Enter Vendor Name: Yard House

City of Purchase: Boston, Massachusetts Payment Type: Out of Pocket Amount: 174.60 USD Reviewed: No

Does this Meal include Alcohol? No Approved Amount: 174.60

Attendees: 4 | Attendee Total: \$0.00 | Remaining: \$0.00

Attendee Name	Attendee Title	Institution/Co...	Attendee Type	Amount
Milanes, Chase	Assistant Direct...		Faculty/Staff	\$0.00
Greene, Denise	Director		Faculty/Staff	\$0.00
[Redacted]	Clerk		Faculty/Staff	\$0.00
[Redacted]	Manager Card ...		Faculty/Staff	\$0.00

Save Attach Receipt

*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

Expenses

Date	Expense Type	Reviewed	Amount	Requested
01/11/2024	Business Meals (513500, 513700) Yard House, Boston, Massachusetts	N	\$174.60	\$174.60
01/11/2024	Business Meals (513500, 513700)	N	\$100.00	\$100.00
01/11/2024	Alcoholic Beverages (513510, 513710)	N	\$24.60	\$24.60
01/11/2024	Tips/Gratuities (513500, 513700)	N	\$50.00	\$50.00

TOTAL AMOUNT \$174.60 TOTAL REQUESTED \$174.60

Expense: Receipt Image

Total Amount: \$174.60 | Itemized: \$174.60 | Remaining: \$0.00

BTEDA20E49836... 1 / 1 80%

Yard House
126 Brookline Avenue
Boston, MA 02215

Table 60
126 Brookline Avenue
Boston, MA 02215
13-03-26 10/03/2016
Gst 9
Check #: 13759-8336

Guest No. 1
1 Small Angel Hair Pasta 10.35
1 \$A&I Kale Caesar 4.25

Guest No. 2
1 Coke 3.25
1 Fish & Chips 16.25

Guest No. 3
1 Soda Water 0.50
1 Cranberry Juice
1 Turkey Bacon Melt 2.0 12.85
1 French Fries

Guest No. 4
1 Sprite 3.25
1 Black Truffle Cheeseburger 13.25
1 Sweet Fries 1.00
1 \$A&I Caesar 3.25

Guest No. 5
1 Lemonade

Summary Details **Receipts** Print / Email

Expenses

Receipts Required

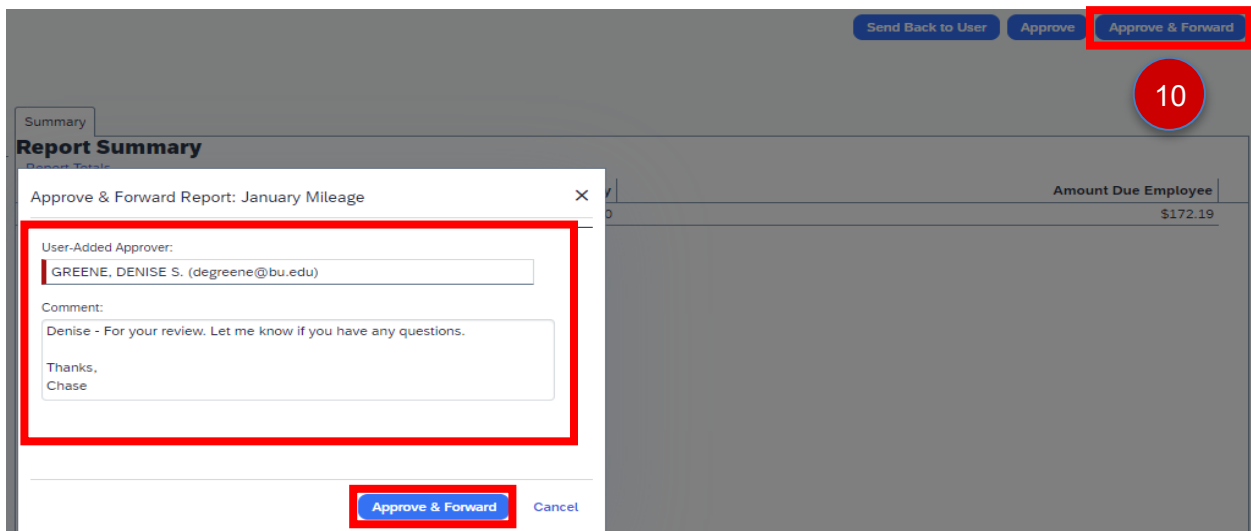
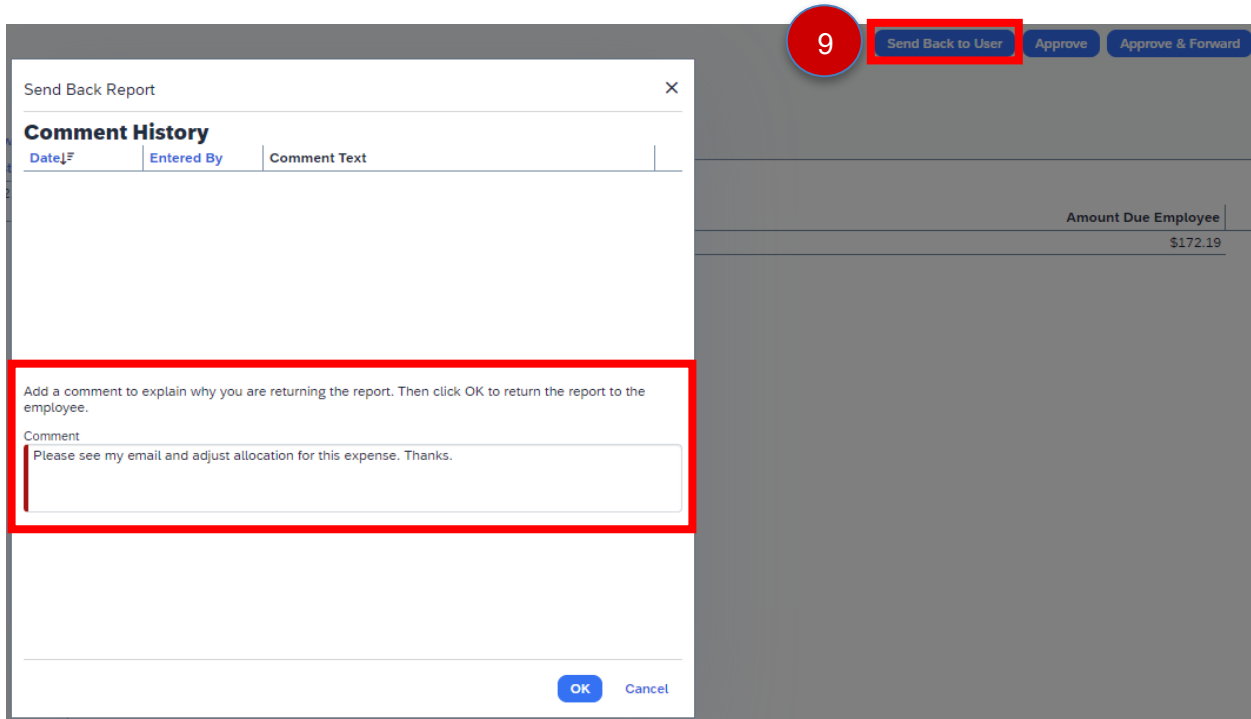
- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images

Date	Expense Type	Reviewed	Amount	Requested
01/11/2024	Business Meals (513500, 513700) Yard House, Boston, Massachusetts	N	\$174.60	\$174.60
01/11/2024	Business Meals (513500, 513700)	N	\$100.00	\$100.00

Expense Receipt Image

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.
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