

## Understanding the Approval Flow

This Quick Reference Guide explains the different levels of approvals expense reports in Concur undergo, and will also explain how to add an another approver into the workflow.

1. Expense reports in Concur start out with a three step Approval Flow: The manager or supervisor level, then cost object level, and then approval for processing (which is done by the Travel Office- also referred to as Accounting Review).

Approval Flow for Report: [REDACTED]

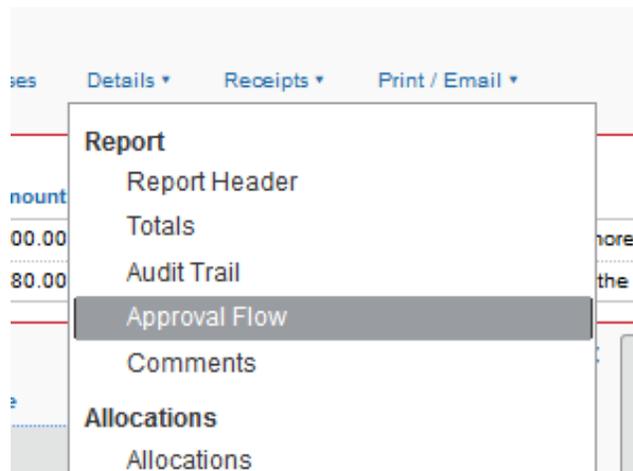
Manager Approval:  
SECHRIST, KARA B. (+) (-)  
*(this step may be skipped)*

Cost Object Approval: (+) (-)

Approval for Processing: (+) (-)

Submit Report Save Workflow Cancel

To view the full approval flow of the expense report , open the expense report, then select the Details drop down, then Approval Flow:



- When a report is first created, the only approver that will be displayed in the approval flow is the manager level, or the supervisor approver. **The supervisor approver is fed from SAP HCM** and feeds into Concur on a daily basis. Your supervisor in Concur will reflect the person you report to in your department's Organizational Chart. Regardless of whether your expense report was for work done outside of your regular departmental assignment- your direct supervisor will receive the report first. **If your Supervisor Approver is incorrect you should contact HR or an Administrative Manager.**

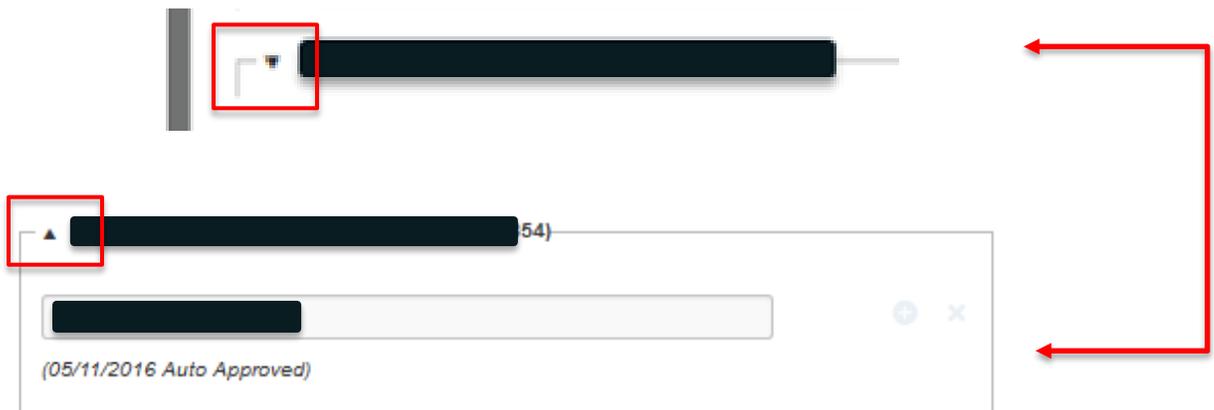
2. Once an expense report is created, it will appear under the Active Reports section of the Expense tab in the Report Owner's Concur profile.

The screenshot shows the 'Manage Expenses' interface with a grid of expense reports. A 'Create New Report' button is visible on the left. The reports are organized into two rows. The top row includes a 'RETURNED' report (06/15/2016) for \$531.21 with 'Exceptions' and 'AE' noted, a 'NOT SUBMITTED' report (06/01/2016) for \$1,272.24, and a 'SUBMITTED' report (06/14/2016) for \$303.02 pending approval. The bottom row shows four 'SUBMITTED' reports from 06/14/2016, 06/12/2016, 06/13/2016, and 06/14/2016, with amounts of \$752.57, \$284.74, \$1,025.26, and \$1,195.98 respectively, all pending approval.

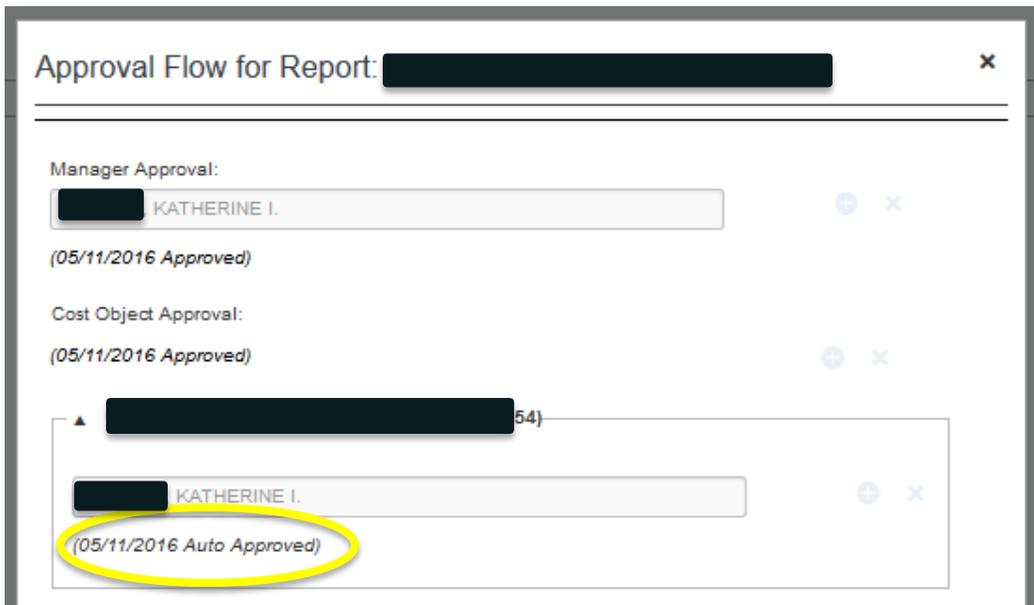
- As depicted above, the report status will appear on the front of each report. Reports with a status of Submitted will also list the approval step that the expense report is currently pending. Reports that are currently pending Supervisor approver will state "Submitted & Pending Approval \_\_\_\_\_" and will display the supervisor's name (censored above for privacy). The name of the supervisor approver can be displayed because as explained above, the supervisor is always the first step in the approval flow, regardless of whether the expense report pertains to that specific department.

3. The supervisor level is followed by the the cost object level of approval: this will be a different person (or different people) based on the cost object or cost objects you are using in your report. **Cost object approvers are specific to the cost object being charged: Not the employee. Cost object approvers are assigned in SAP FI by your department's DSA and feed into Concur on a daily basis: these approvers cannot be changed by the Travel Office.** If you believe the approver is incorrect, please send an email to [travelexpense@bu.edu](mailto:travelexpense@bu.edu)

- In the above example, we see four different different cost objects are being charged (cost objects obscured for privacy)- meaning there would be four cost object approvers \*Note: Cost object approvers will only see the expenses that are being charged to the cost object they are an approver for\*
- The cost object approver(s) will not be displayed until after the supervisor approver has approved the report. At that point, the cost object approver field will be populated, and can be viewed by clicking the small triangle to the left of the cost object in order to expand the section- pictured above.

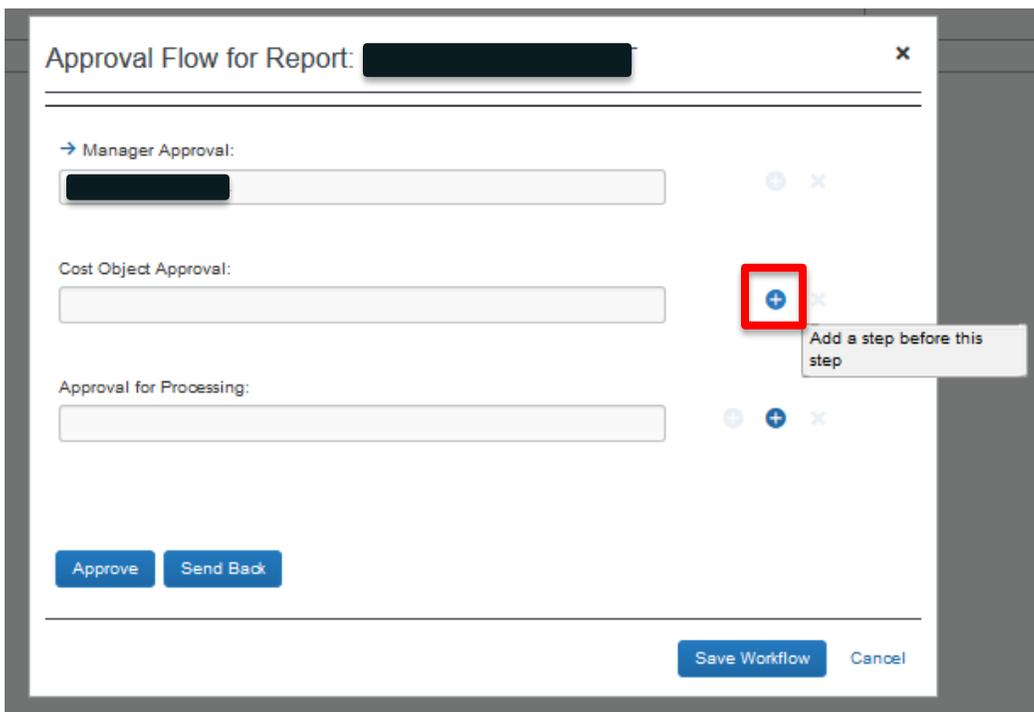


- In the below example, we can see that occasionally, someone will hold more than one role in the approval flow. This results in an “auto approval.”

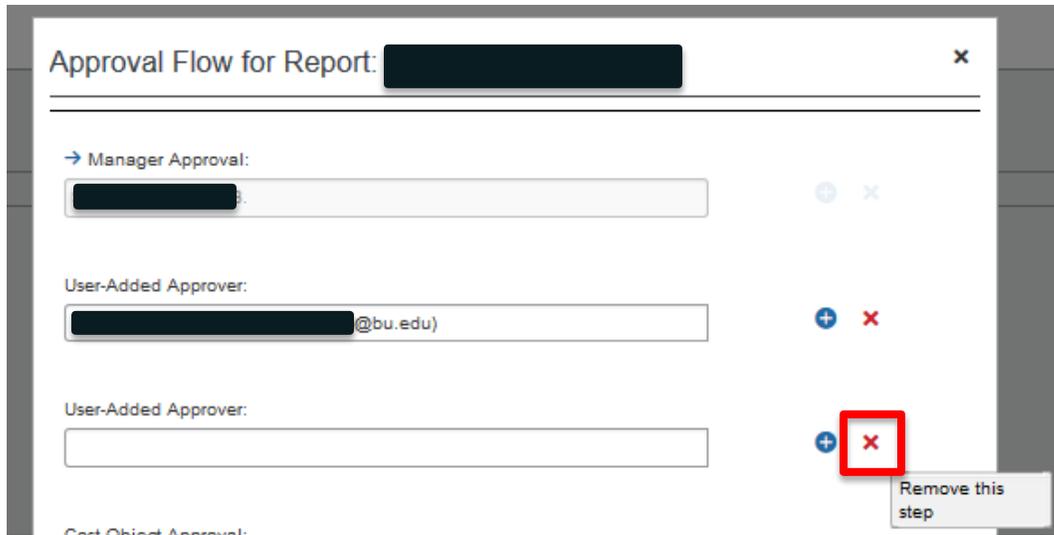


- When Concur sees that an approver holds more than one approval role, their approval will be automatically applied at the following level as well, meaning they will only receive the report once to approve. Above, we see that the supervisor approver and the cost object approver were the same person- so the cost object level was “auto approved” once they approved the report at the supervisor level.

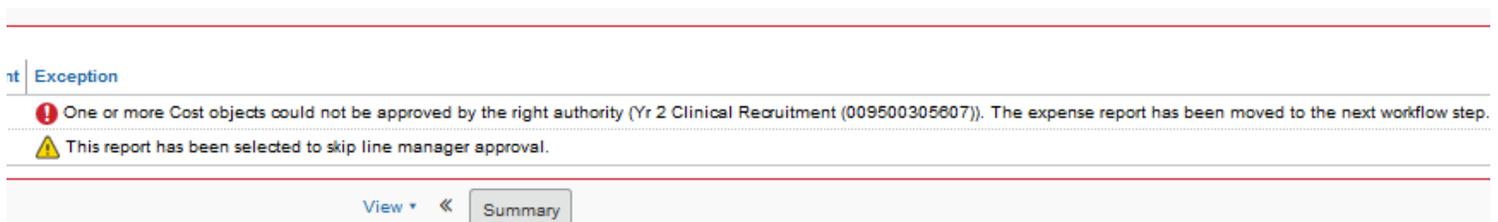
- Although the three step approval flow is standard, approvers can manually add other approvers to the workflow by adding a “User Added Approver.” User added approvers can be inserted into the workflow by clicking the blue “+” button to the right of the desired approval level.



- As depicted above, you can add an approver before the desired step, but not after it. This means that the supervisor could add an approver before the report goes to the cost object approver, or before it is sent to accounting review, but the cost object approver would only be able to add an approver before the report is sent to accounting review.
- Once you hit the Add Approver button, the empty field will appear- to select the desired user you will need to begin typing their name- a drop down will populate and you can select the desired user from the list. Because the User-Added Approvers are not hardwired- you are able to change them or delete them by pressing the red "X"

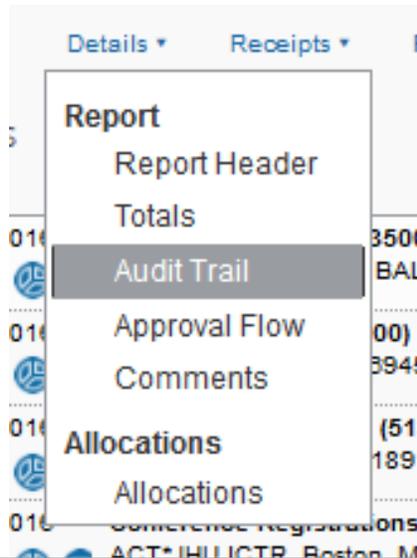


**6. Similar to the Auto-Approvals covered in Step 3, occasionally reports will not follow the standard three step approval flow due to Exceptions within the report.**



- In the above example, two exceptions exist. The first exception (  ) states that one or more cost objects could not be approved by the right authority, and that the expense report has been moved to the next workflow step. This exception occurs after a report has been submitted, when the report owner is also the cost object approver.
- The second exception (  ) denotes that the first approval step was skipped. Based on how the employee exists within their department's organizational heirarchy, some may be exempt from supervisor approval- in which case the report will flag an exception after the report has been submitted that the report has been selected to skip line manager approval.

- More details can be provided about each of these exceptions by reviewing the Audit Trail of the report. To do this, click the Details drop down, then select Audit Trail.



Audit Trail			
Report Level			
Date/Time	Updated By	Action	Description
10/31/2016 06:31 AM	[REDACTED]	Approval Status Change	Comment: Status changed from Pending Cost Object Approval to Auto Approved Comment: Skipping cost object approval step since the cost object approver is the same as the report owner. [REDACTED]
10/31/2016 06:31 AM	System, Concur	Exception	This report has been selected to skip line manager approval.
10/31/2016 06:31 AM	System, Concur	Approval Status Change	Status changed from Submitted & Pending Approval to Auto Approved Comment: This step has been skipped as this employee is Exempt from Manager Approval

- Some reports may contain both exceptions, others may contain just one of the two. Neither exception should be cause for concern, however if the department would like to add a different approver to the approval flow they can do so by emailing [travelexpense@bu.edu](mailto:travelexpense@bu.edu) with the name of the desired approver as well as the report key (to find the report key, please refer to [this QRG](#)).

7. If a report is rejected and Sent Back to User at any point in the approval flow, the report will still appear under the Active Reports section of the report owner's profile, but will now be available for editing.



8. Up until an expense report is sent for payment, the status of the report will be listed on the report in the Active Reports section. Once a report is sent for payment, the report owner will receive an email notifying them of the change in report status; at this point, the expense report will no longer appear under Active Reports, and will now be available in the Report Library.