

APPROVAL FLOW FOR TRAVEL REPORTS

The approval flow within Concur is a record of all approval steps for an Expense Report. This guide explains the various levels of approval that Travel Expense Reports undergo and shows how Supervisors, Cost Object Approvers, or user-added approvers can add others to the approval flow when needed.

VIEWING ACTIVE REPORTS AWAITING APPROVAL

Existing Expense Report will appear in the Active Reports section of the Expense tab in the report owner's Concur profile. The report status will appear above each report (shown below). Reports with "Submitted" status will list the approval step currently pending.

Reports stating "Submitted & Pending Approval _____," are awaiting supervisor/manager approval. As shown in the workflow graphic below, the supervisor is the first level of approval.



Travel Workflow





THREE-STEP APPROVAL FLOW

*The manager approver is generated by SAP HCM and feeds into Concur daily. The person to whom you report (your "supervisor" according to your department organizational chart) will be your manager in Concur.

Regardless of whether your expense report was for work completed outside of your regular department assignment, your manager will be the first to receive the report. If your manager approver is incorrect, please contact Human Resources Information Systems at hrsys@bu.edu.

VIEWING THE FULL APPROVAL FLOW

To view the full approval flow of an expense report, open the report, click on the "**Details**" heading, and then select "**Approval Flow**" from the drop-down menu.



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Quick Reference Guide Understanding Approval Flow Concur Travel & Non-Travel

COST OBJECT APPROVAL

The supervisor level is followed by the Cost Object level of approval. Cost Object approver(s) will only be displayed once the supervisor has approved the report.

Note: It is now required that you select your Cost Object Approver when completing the Report Header for a Travel Expense Report. The names of the financial approvers for the Cost Object you have selected will be listed in the Approver drop-down. Select the appropriate individual(s) from the Approver drop-down.





Within the Approval Flow screen of the expense report, you can view the Cost Object Approvers by clicking the small triangle to the left of the Cost Object (pictured below). If the list of Cost Object Approvers needs to be updated, contact your Departmental Security Administrator (DSA). If you are unsure who your DSA is, contact Information Security at <u>buinfosec@bu.edu</u>.

In the example below, there are 4 different Cost Objects being charged; therefore, there will be 4 Cost Object Approvers. Note: Cost Object Approvers will only see the expenses being charged to the Cost Object for which they are an approver.

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0	×
0	

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AUTO-APPROVAL

It is possible for one person to hold more than one role in the approval flow. This results in an "auto approval," as shown below.

Approval Flow for Report:		×
Manager Approval:	0 ×	
(05/11/2016 Approved)		
Cost Object Approval: (05/11/2016 Approved)		
54) KATHERINE I. (05/11/2016 Auto Approved)	e ×	

- If an approver holds more than one approval role, that individual's approval will automatically apply to the following level as well, meaning the individual will only receive the report once to approve.
- In the example above, the Supervisor approver and Cost Object Approver are the same; so, the report was "auto approved" at the Cost Object level once it was approved at the Supervisor level.



USER ADDED APPROVER

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

Approval Flow for Report:		×	
→ Manager Approval:	•	×	
Cost Object Approval:	•	Add a step bet	fore this
Approval for Processing:	• •	×	
Approve Send Back			
	Save Workfle	ow Cancel	

- As depicted above, you can add an approver <u>before</u> the desired step, but not after it. This means the <u>Supervisor</u> could add an approver before the report goes to the Cost Object Approver or before it is sent to accounting review, but the <u>Cost Object Approver</u> can only add an approver before the report is sent to accounting review.
- Once you hit the "Add Approver" button, an empty field will appear. Begin typing the desired user's name in the field or select the user's name from the drop-down list. Because user-added approvers are not hardwired, you can change or delete them by clicking the red "X."

Approval Flow for Report:	×
Manager Approval:	• ×
User-Added Approver:	• ×
User-Added Approver:	⊕ ×]
Cost Object Assessed:	Remove this step



EXCEPTIONS WITHIN A REPORT

Like the auto-approvals covered in Step 3, reports sometimes will not follow the standard three-step approval flow due to **Exceptions** within the report.

-					
Γ					
I					
1	t Exception				
	One or more Cost objects could not be approved by the right authority (Yr 2 Clinical Recruitment (009500305607)). The expense report has been moved to the next workflow ste				
l	This report has been setected to skip line manager approval.				
L					
	View * 《 Summary				

- In the example above, two exceptions exist. The first exception () indicates 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 and when the report owner is also the Cost Object Approver.
- The second exception () denotes that the first approval step was skipped. Depending on how the employee exists within their department's organizational hierarchy, they may be exempt from supervisor approval; in which case, after the report has been submitted, it will flag an exception indicating that it has been selected to skip line manager approval.
- For more details about each of these exceptions, review the Audit Trail of the report: click the Details heading and select Audit Trail from the drop-down list.

AUDIT TRAIL

	Details • Receipts •	F
	Report	
°	Report Header	
	Totals	2500
8	Audit Trail	BAL
01(Approval Flow	00)
e	Comments	3945
010	Allocations	(513 1891
9	Allocations	
016	ACTUUUCTB_Basta	ions

Audit Trail				×
Report Level	Updated By	Action	Description	
		· · · · · ·	Comment:	
10/31/2016 06:31 AM	Η	Approval Status Change	Status changed from Pending Cost Object Approval to Auto Approved Comment: Skipping cost object approval step since the cost object approval step since the cost object owner devices device in the same as the second owner devices device in the same as the second (099500305607)	m
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, while others may contain just one of the two. Neither exception should be cause for concern. If the department would like to add a different approver to the approval flow, they should create a ticket in the <u>Financial Affairs</u> <u>Customer Service Portal</u> and include the name of the desired approver as well as the report key (to find the report key, please refer to <u>How to Find the Report Key</u> user guide).

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.

Home / Expense / Manage Expenses			
Manage Expenses			
Report Library View: Active Re	ports V?		
Association for Asian 04/09/2025	BUCSA Dinner 04/07/2025		
\$1,321.58	\$217.92		
Returned	Due Employee: \$217.92 Submitted		
Sent Back to User CHASE MILANESE	Pending Cost Object Approval		

- 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