

Quick Reference Guide How to Approve Expense Reports Concur Travel & Non-Travel

## HOW TO APPROVE A NON-TRAVEL EXPENSE REPORT

Expense Reports must be approved by an Expense Approver before they can proceed through the workflow. An Expense Approver may be a supervisor, manager or delegate who has permission in Concur to approve expenses. Please follow the steps below to complete required approvals as an Expense Approver.

1. Sign into Concur to access your home page. [Reference: How to Access Concur from BUworks]

On the home page, there are several options to access Expense Reports that are pending approval:

- ١. Click the Home drop-down in the top menu bar and select Approvals from the Applications list.
- II. In the quick task bar, click **Required Approvals**.
- III. At the bottom of the page, click **Approvals**.

SAP Concur Home ~						@ CM
	Required Approvals     2     Attorization			able Excenses 0		•
	Requests					
BOSTON	Alerts					~
UNIVERSITY	Company Notes					
A Booking for myself   Book for a guest	**IMPORTANT UF	DATE**: Effective February 18, 2025, University-Funded <u>In</u> approval from a Dean or Department Head <b>AND</b> a Senior	nternational tra University Leade	<u>vel</u> requires written er		
Flight Search	It is the traveler's	responsibility to secure this approval in writing prior to bo	oking, whether o	online in Concur, or		
Round Trip One Way Multi City From  Departure city, airport or train station		ver Agent. Adoitionativ, the approval must be attached to	the concur exp	Read More		
Find an airport   Select multiple airports	Available Expenses	Expense Reports	+	Approvals (2)		See All
Rind an aport of their statedor Rind an aport   Select multiple argoris				TRAVEL SEI May 2025 Bus May 30, 2025	RVICES GUEST iness Expenses	\$1,127.75
Show More				TRAVEL SEI May Higher Ec May 30, 2025	I Conference 2025	\$1,482.28
	No Available Expenses When you have available expenses, you'll see them here	No Reports When you have reports, you'll see them here.		;		



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## APPROVALS PAGE

On the Approvals page, there is a tab for Requests and Expense Reports awaiting approval. Click on each tab to review the items pending your approval and work the count to zero to complete your approval tasks.

2. Select the Request/Report you wish to open and review.

Ap	prova	ls					
Re	03 equests	02 Expense Reports					
Req	uests	· · · · · · · · · · · · · · · · · · ·					
Ар	prove						
Ap	Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Tot
<b>A</b> p	prove Request Type Travel	Request Name Chicago Conference June 2025	Request ID 3DFW	Employee Action TEST	Request Dates 06/05/2025 06/08/2025	Date Submitted	To \$1.000
	Request Type Travel Travel	Request Name Chicago Conference June 2025 Denver Conference June 2025	Request ID 3DFW 3DFV	Employee Action TEST Action TEST	Request Dates 06/05/2025 06/08/2025 06/01/2025 06/01/2025 06/04/2025	Date Submitted 05/30/2025 05/30/2025	To Si con Successione

Approv	vals				
03 Requests	02 Expense Reports				
Report Name		Employee	Report Date	Amount Due Employee	Requested Amount
May 2025 Busir	ess Expenses	Action TEST	05/30/2025	\$153.00	\$
May Higher Ed (	Conference 2025	Action TEST	05/30/2025	\$55.00	4 8



5/25/2025

2/7

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3. Review the open report, click the **Details** button, and select **Report Header** from the drop-down list.

SAP C	oncur	Approva	ls 🗸			
Approva	ls Home	Requests	Reports	5		
May 2 Summary Expenses	2025 Details  Report Report F	Busi	Print / Ema	Expens	Ses [Action T	EST] Summary
05/14/2025	Totals Audit Tra	ail a	assachusetts	\$135.00	\$135.00	Report Summary Report Totals
05/14/2025	Approva Commer	l Flow 1	0040)	\$974.75	\$974.75	
05/14/2025	Allocations Allocatio	ons	0, 513700)	\$18.00	\$18.00	

4. Review report details (e.g., account being charged, start date, end date). Note: If this is a reimbursement for a guest or student, you should confirm the check payee and address. Click Save or **Cancel** to exit the Report Header screen.

eport header for: May 2025 Busin	ess Expenses			23 ×
Jser Name				
Action TEST				
leport Type				
*Employee Non-Travel				
eport Name	Report Start Date N?	Report End Date 🏹		
May 2025 Business Expenses	05/01/2025	05/30/2025		
ost Object	Cost Object Approver b?			
(1060260000) Procure to Pay (P2P)	(U5:			
eceipts Received	Approval Status	Payment Status	Report Total	
Yes Y	Submitted & Pending Approval	Not Paid	1,127.75	
ersonal Expenses	Amount Not Approved	Amount Approved	Amount Due BU	
).00	0.00	1,127.75	0.00	
mount Due User	Amount Due *US Bank	Total Amount Claimed	Comment	
153.00	974.75			
			4	
				Save Cancel



5. Click **Print/Email** and select **BU Non-Travel Detailed Report** from the drop-down list. The first section in the **BU Detailed Report** is the information contained in the Report Header.

Ι	/lay 2	025	Busir 5	ness	Expens	Ses [Action T	EST]
	Summary	Details 🛡	Receipts 💌	Print / Ema	il 🕶		
Exp	oenses			*BU N	on-Travel Detaile	d Report (NEW)	Jummary
	Date↓₹	Expense	Туре		Amount	Requested	Report Summary
	05/14/2025	Meetings Sunset Gr	( <b>513910)</b> ill, Boston, Mas	ssachusetts	\$1	D	Report Totals
	05/14/2025	Research Wallpaper	Supplies (510 Stores	040)	<b>(</b>	75	
	05/14/2025 🛕 📝 🛒	Parking/N City of Bo	Meters (513500 ston	), 513700)	<b></b>	00	

6. Scroll to the Allocation Summary to view each of the allocations in the report.

	Cost Object Allocation Sum	mary
Cost	Object	Amount
10602	60000 (Procure to Pay (P2P))	\$1,127.75
	Summary by Expense Ty	pe
Exper	пзе Туре	Amount
Meetin	ngs (513910)	\$135.00
Parkin	g/Meters (513500, 513700)	\$18.00
Resea	rch Supplies (510040)	\$974.75
	Summary by Payment Ty	pe
Paym	ent Type	Amount
Out of	Pocket	\$153.00
Test C	BCP	\$974.75
	Report Total :	\$1,127.7
Per	sonal Expenses :	\$0.0
Total A	mount Claimed :	\$1,127.7
An	nount Approved :	\$1,127.7
University Di	sbursements	
Ar	mount Due User :	\$153.0
Amour	nt Due *US Bank :	\$974.7
Total Pa	id By University :	\$1,127.7
User Disburs	ements	
Amount Due	BU :	\$0.0
Amount Due	University Card From User :	\$0.0
Total Paid By	User :	\$0.0



- 7. The **Expenses** section displays details on the expense types claimed. Click on any expense line along the left side to see details displayed in the Expense Report page on the right. Note: If there are multiple line items in the **Expenses** list, you can sort by Date, Expense Type, and Amount by clicking the corresponding column header.
- 8. After reviewing the expense information, review the **Receipt\* Image** and repeat the process for all expenses **\$25.00 and greater**.
- 9. Expand expenses by selecting the radial to the left to view itemizations. Note: All meals or expenses containing alcohol must be itemized.

$\Box$	Date↓₹	Expense Type	Reviewed	Amount	Requested						75155
V	01/11/2024	Business Meals (513500, 513700) Yard House, Boston, Massachusetts	N	\$174.60	\$174.60				Total Amo	unt: \$174.60   Itemized: \$174.60	Remaining
	01/11/2024	Business Meals (513500, 513700)	N	\$100.00	\$100.00	Previous Comment	an abath I sa ala ƙasa Tao asi Tao				
	01/11/2024	Alcoholic Beverages (513510, 513710)	N	\$24.60	\$24.60	Entered by CHASE MILANESE. Holida	Transmiss Data		Duringer Duringer	Fatas Mandas Manas	
	01/11/2024	Tips/Gratuities (513500, 513700)	N	\$50.00	\$50.00	Business Meals (513500, 513700)	01/11/2024	ë	Staff Lunch	Yard House	
	_					City of Purchase	Payment Turna		Amount	Paviawad	
						Boston, Massachusetts	Out of Pocket	~	174.60 USD 🗸	No	~
									·····	000	
						Door this Most include Alcohol2	Approved Amount		Comment		
						Does this Meal include Alcohol?	Approved Amount		Comment		
						Does this Meal include Alcohol? No Spousal Travel Included?	Approved Amount 174.60		Comment		
						Does this Meal include Alcohol? No Spousel Travel Included? Attendees New Attendee Advanced Searc	Approved Amount 174.60 h Favorites Search Re	cently Used	Comment O Attendees: 4   A	ttendee Total: \$0.00   Ren	naining: \$1
						Dees this Meal include Alcohol? No Spousal Travel Included? Attendees New Attendee Advanced Searce Attendee Name	Approved Amount 174.60 h Favorites Search Re	cently Used	Comment  Comment  Attendees: 4   A  Attendee Titte Institu	ttendee Total: \$0.00   Ren	naining: \$0 Modif
						Dees this Meal include Alcohol? No Spousal Travel Included? Attendees New Attendee Advanced Searc Attendee Name Milanese, Chase	h Favorites Search Re	cently Used	Comment Comment Attendees: 4   A Attendee Titte Institu Assistant Direct	ttion/Co Attendee Type	naining: S0 Modifi Amount \$0.00
						Dees this Meal include Alcohol? No Spousal Travel Included? Attendees Attendee Advanced Searc Attendee Name Milanese, Chase Greene, Denise	Approved Amount 174.60 h Favorites Search Re	cently Used	Comment Commen	ttendee Total: \$0.00   Ren tion/Co Attendee Type   Faculty/Staff Faculty/Staff	naining: S( Modif Amount \$0.00 \$0.00
						Dees this Meal include Alcohol? No Spousal Travel Included? Attendees Attendee Name Milanese, Chase Greene, Denise	Approved Amount 174.60 h Fovorites Search Re	cently Used	Comment Commen	ttendee Total: \$0.00   Ren ttion/Co Attendee Type   Faculty/Staff Faculty/Staff Faculty/Staff	maining: \$0 Modify Amount \$0.00 \$0.00

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

- 1. Hover over the receipt icon to the left of the expense
- 2. Select the individual expense and hitting the Receipt Image tab to the left of the Expense tab
- 3. Click the Receipts drop-down to View Receipts in a new window or in current window

	1-	I		Expe	Receipt Image					
> patel=	Expense Type	Reviewed	Amount	Requested				Total	Amount: \$174.60	Itemized: \$174.60   Rema
	Yard House, Boston, Massachusetts	14	\$174.00	51/4.00						
01/11/20	24 Business Meals (513500, 513700)	N	\$100.00	\$100.00						
01/11/20	24 Alcoholic Beverages (513510, 513710)	N	\$24.60	\$24.60	B1EDA20E49836.	1/1	- 80%	+	⊡ <i>©</i>	. ± 🖻
] 01/11/20	24 Tips/Gratuities (513500, 513700)	N	\$50.00	\$50.00						
				-		Y Table Carly∦ 01.03 pw	and House 126 Brookline Avenue Baston, M. 02215 60 Check # :13	1759-8336	Table Carly M 13:03:26 : 1 Small	Check # :1375 GOUGY2016 Guest No.1 Guest No.1 Angel Mair Pasta
	•				*	Transaction	n #:1522532455	ust 9	1 6-1	. Guest No.2



## REPORT PROCESSING OPTIONS

Once you have finished reviewing the report, you must either approve or reject it.

As an expense 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 training guide.

Send Back to User - if changes need to be made, click "Send Back to User" and enter a detailed ٠ comment to explain why you are returning the report. Click "OK" to send the report back to the creation profile for the Submitter to make changes and resubmit.

Send Back Report × Comment History Date JF Comment Text  Amount Due Employee  St72.19  Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and edjust allocation for this expense. Thanks.  Corr ancet  Corr ancet  Corr ancet						Send Back to User	Approve	Approve & Forward
Comment History         Date F       Entered By       Comment Text         Amount Due Employee       8172.19         Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.       S172.19         Comment       Please see my email and adjust allocation for this expense. Thanks.	Send Back Report			×				
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.	Comment History	Text						
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.								
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.							Amou	int Due Employee
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.				[				\$172.19
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.								
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.  Example The set of th								
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.								
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee. Comment Please see my email and adjust allocation for this expense. Thanks.  Example Second Se				_				
employee. Please see my email and adjust allocation for this expense. Thanks.	Add a comment to explain why you are returning th	e report. Then click OK to return	the report to the					
Please see my email and adjust allocation for this expense. Thanks.	employee.							
	Comment Please see my email and adjust allocation for this	evnense Thanks						
CK Cancel	The action of the and adjust anotation for the	expense. mana.						
CK cancel								
OK Cancel								
OK Cancel								
OK Cancel								
OK Cancel								
Cancel Cancel								
CK Cancel	2			-				
			OK	ncel				

- Approve if the Expense Report passes audit, click Approve button to move the report to • Accounting Review, which is the final step before it is sent for payment.
- Approve & Forward if the Expense Report passes audit but you would like to add another • approver to the workflow, hit **Approve & Forward.** The Expense Report will go to another approver before reaching Accounting Review.

		Send Back to User Approve & For
ummary		
eport Summary		
Approve & Forward Report: January Mileage	× /	Amount Due Employe
	p	\$172.
User-Added Approver:		
GREENE, DENISE S. (degreene@bu.edu)		
Comment:		
Denise - For your review. Let me know if you have any questions.		
Thanks		
Chase		
Approve & Forward	Cancel	
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You have completed the process to approve a Non-Travel Expense Report.