HOW TO APPROVE A 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.

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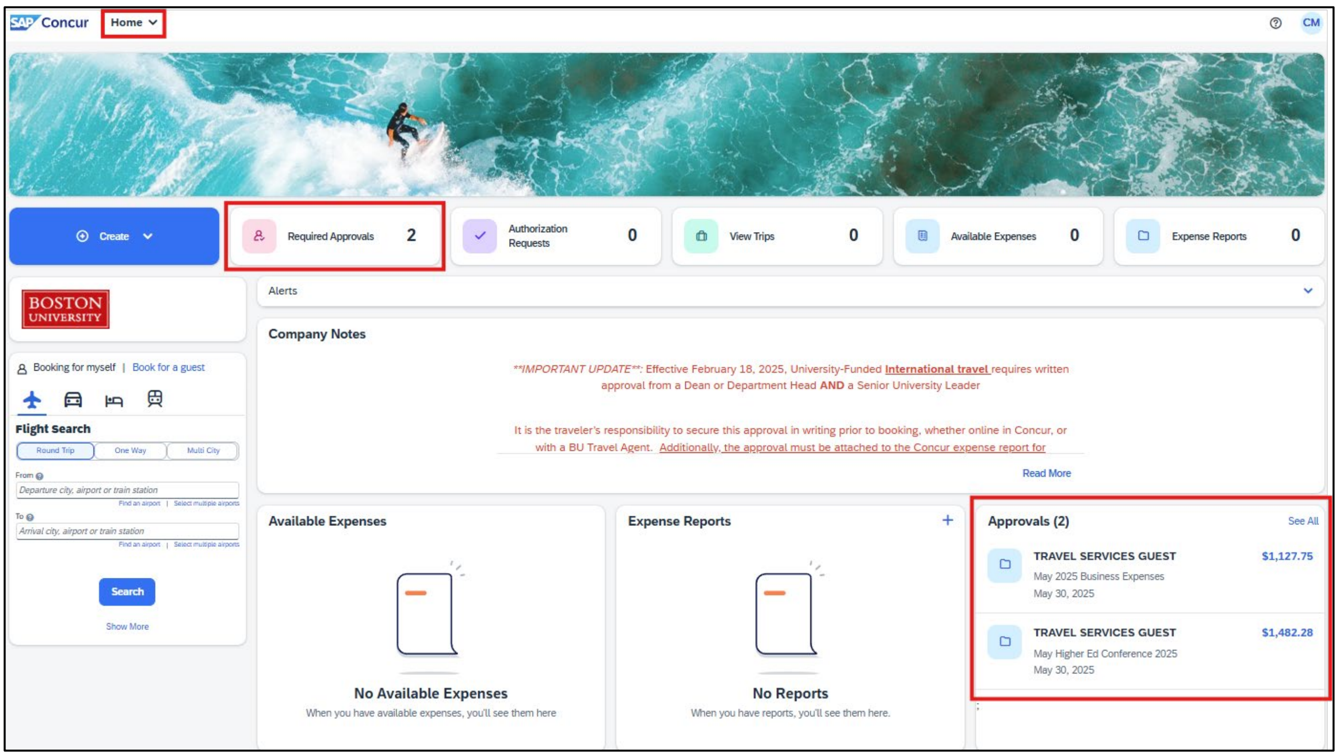
1. Sign into Concur to access your home page. [Reference: How to Access Concur from BUworks]

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

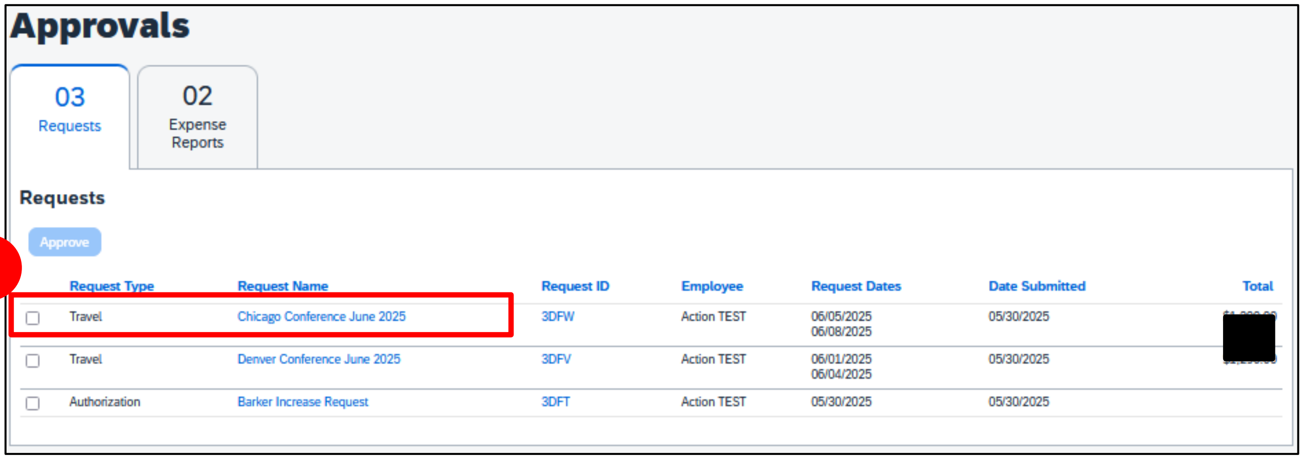
   I. Click the **Home** drop-down in the top menu bar and select **Approvals** from the Applications list.
   II. In the quick task bar, click **Required Approvals**.
   III. At the bottom of the page, click **Approvals**.

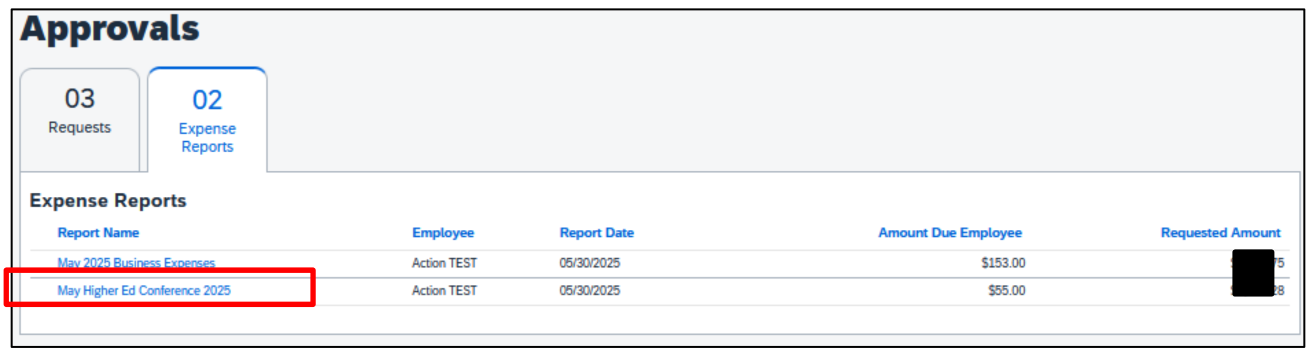


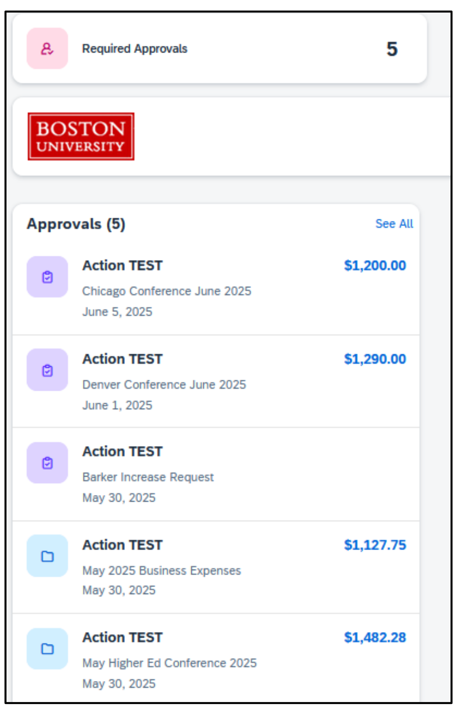
APPROVALS PAGE

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.

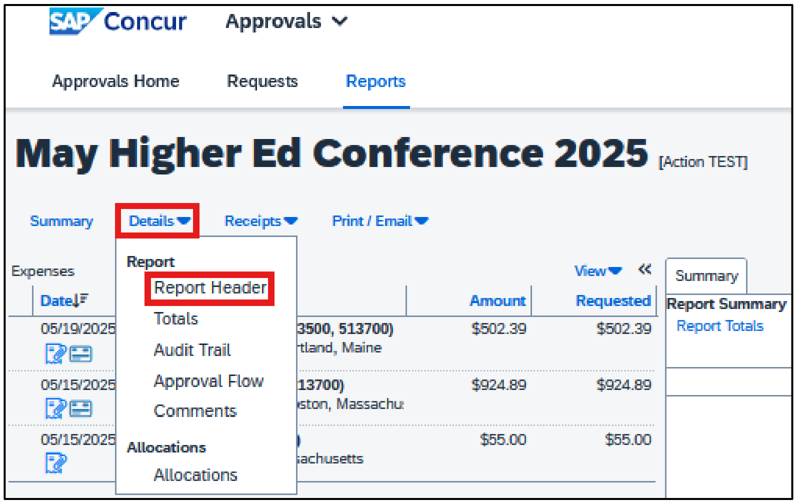
2. Select the Request/Report you wish to open and review.



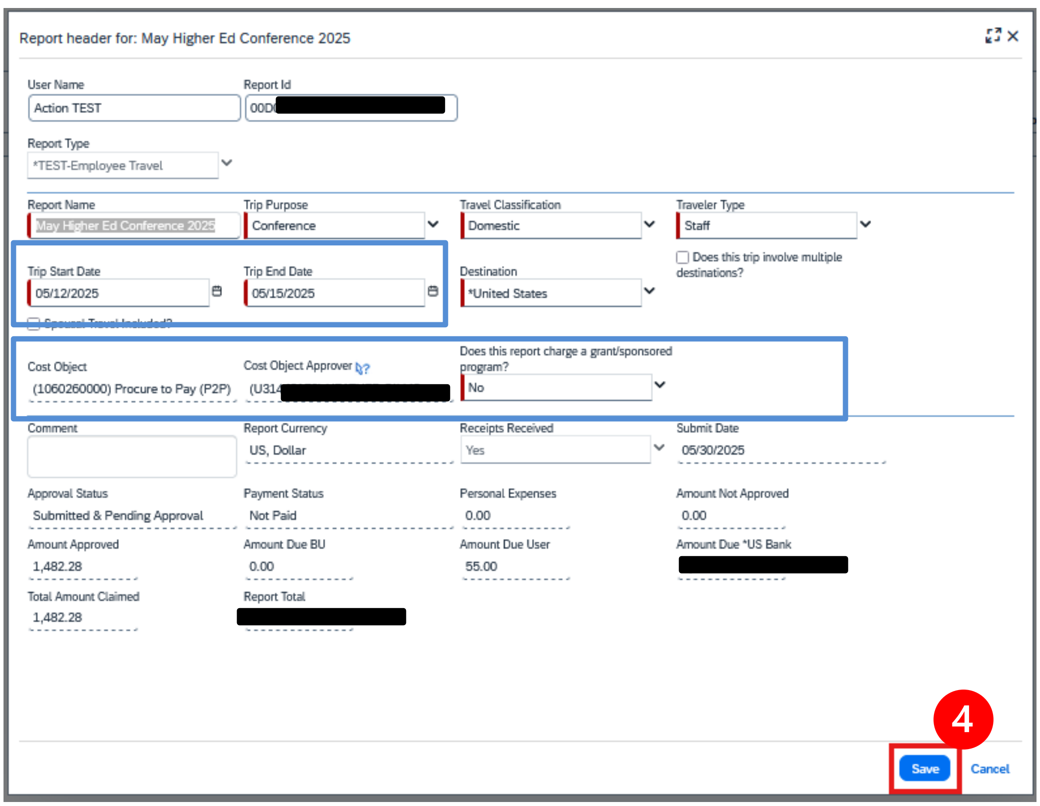




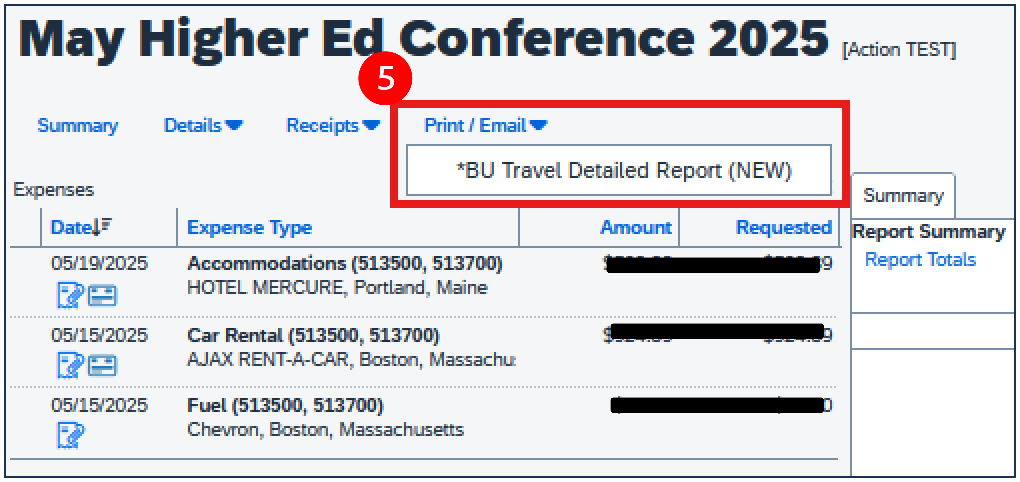
3. Review the open report, click the **Details** button, and select **Report Header** from the drop-down list.



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



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



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

Cost Object Allocation Summary

Cost Object	Amount
1060260000 (Procure to Pay (P2P))	$1,482.28

Summary by Expense Type

Expense Type	Amount
Accommodations (513500, 513700)	$502.39
Car Rental (513500, 513700)	$924.89
Fuel (513500, 513700)	$55.00

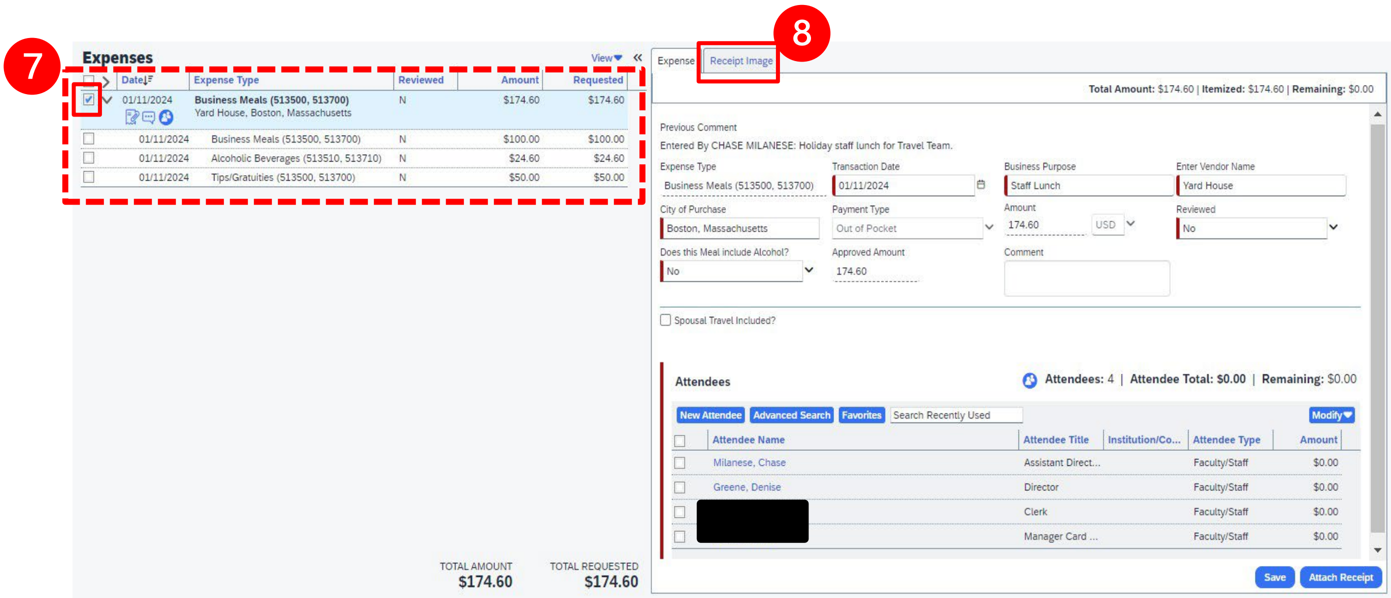
Summary by Payment Type

Payment Type	Amount
Out of Pocket	$55.00
Test CBCP	$1,427.28

Report Total :	$1,482.28
Personal Expenses :	$0.00
Total Amount Claimed :	$1,482.28
Amount Approved :	$1,482.28
University Disbursements	
Amount Due User :	$55.00
Amount Due *US Bank :	$1,427.28
Total Paid By University :	$1,482.28
User Disbursements	
Amount Due BU :	**$0.00**
Amount Due University Card From User :	**$0.00**
Total Paid By User :	**$0.00**

7. The **Expenses** area will display detailed information on the expenses type claimed. Click on any expense line along the left side to see the 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.

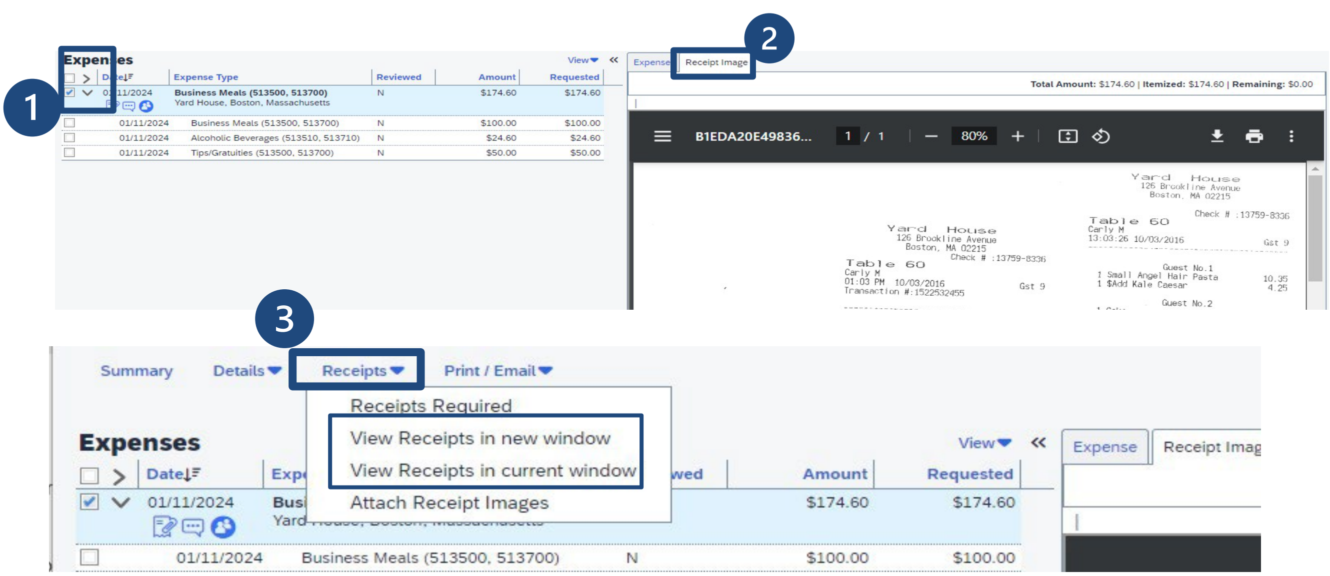


8. After reviewing the expense information, review the **Receipt* Image** and repeat the process for all expenses **$25.00 and greater**.

9. Expand expenses by selecting the radial to the left to view itemizations. Note: All meals or expenses containing alcohol must be itemized.

***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**

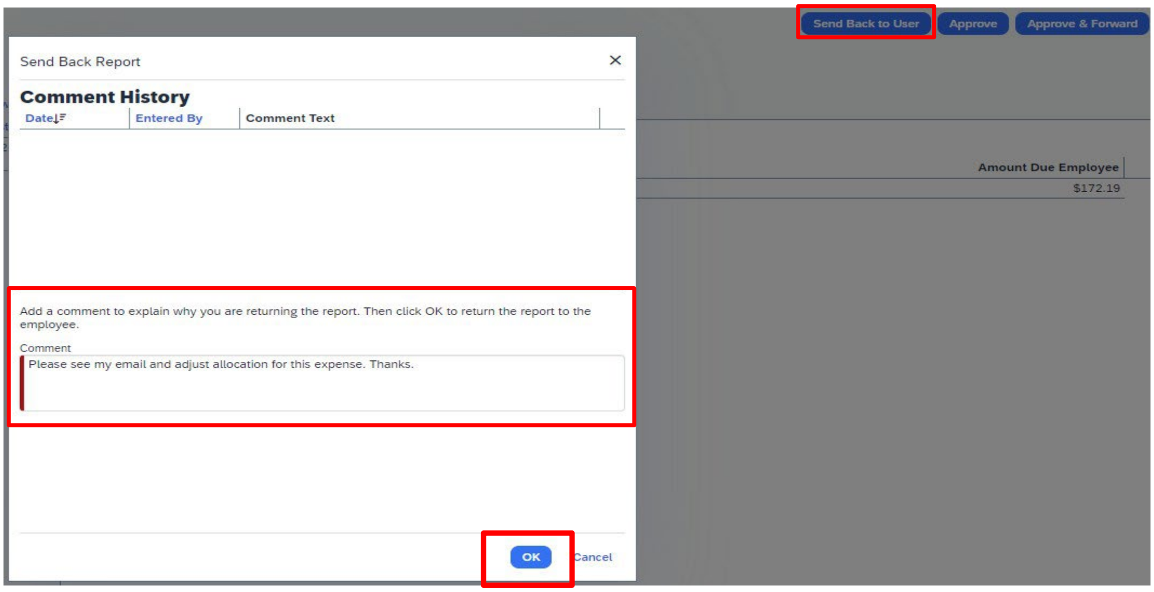


REPORT PROCESSING OPTIONS

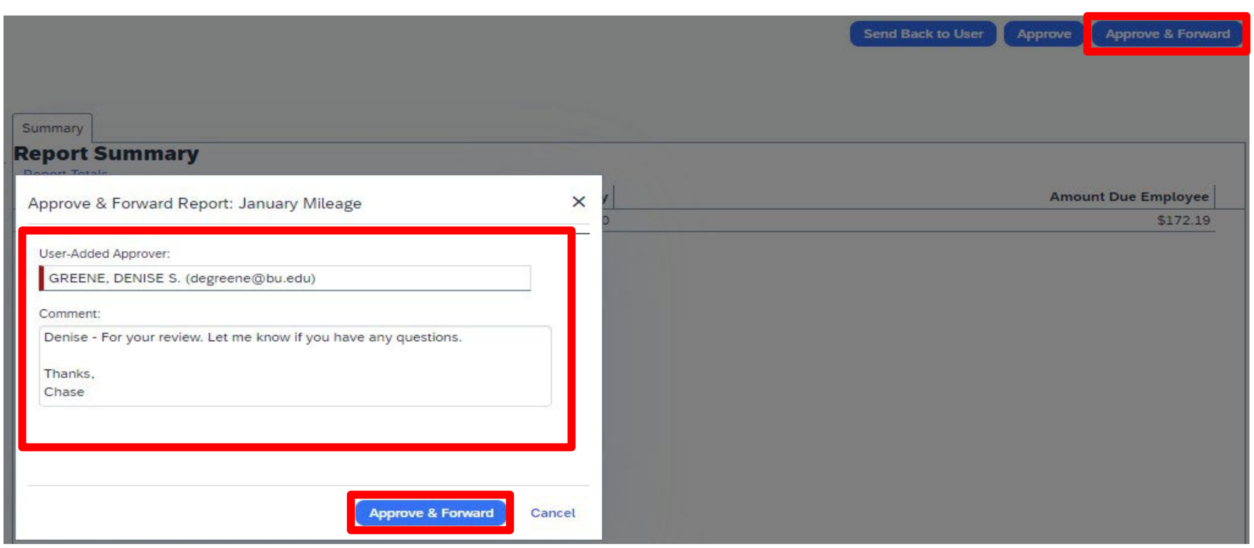
Once you have finished reviewing the report, you must either approve or reject it.

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.

- **Send Back to User –** if changes need to be made, click "**Send Back to User**" and enter a detailed **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.



- **Approve** – if the Expense Report passes audit, click the **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.



You have completed the process to approve a Travel Expense Report.