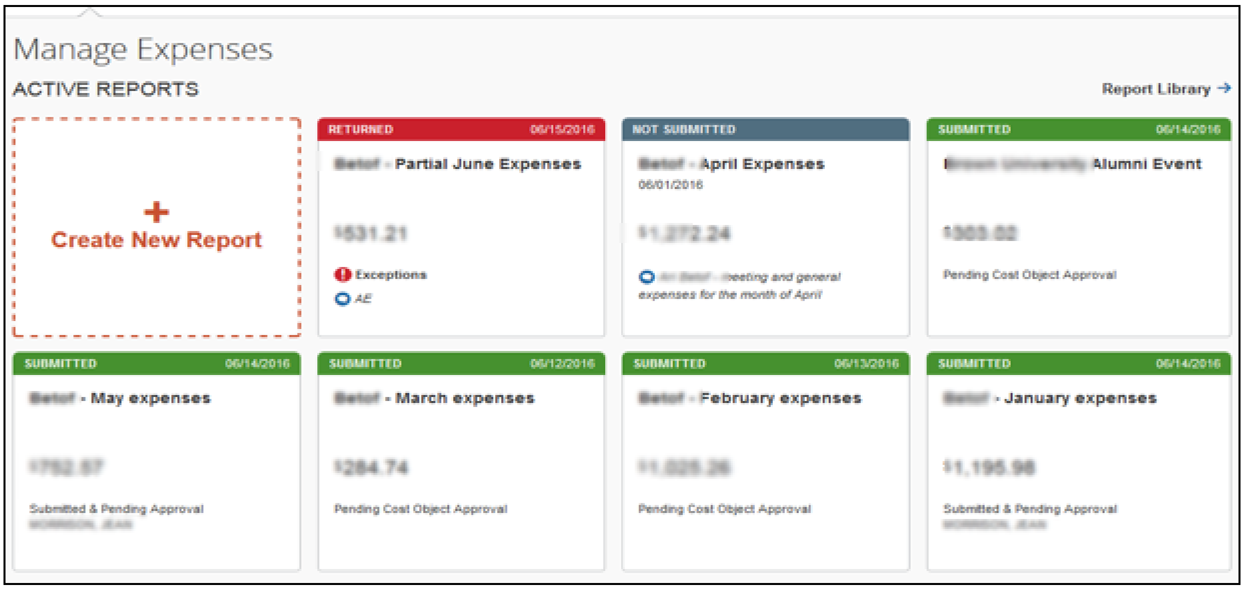
HOW TO VIEW & ADJUST APPROVAL FLOW FOR NON-TRAVEL EXPENSE REPORTS

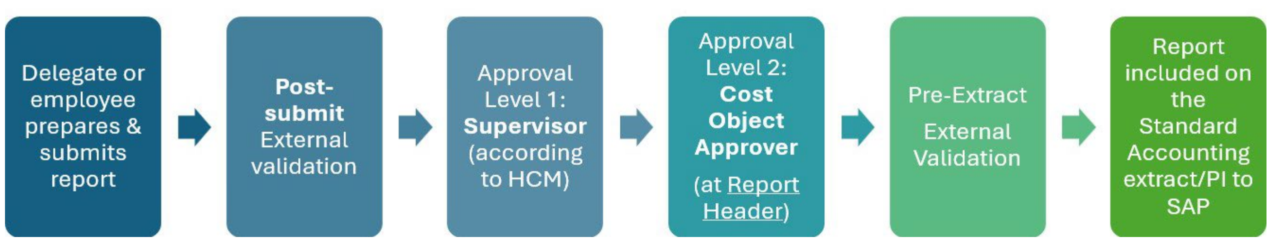
Viewing Active Reports Awaiting Approval

1. Log in to Concur.
2. Click the **Home** drop-down and select **Expense**. Existing Expense Reports will appear in the **Report Library**.
3. View **Active Reports**. 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.

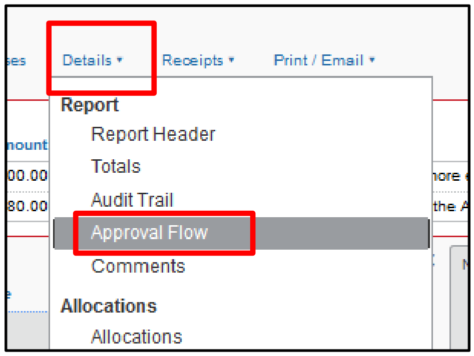


Approval Workflow for Non-Travel Expense Reports

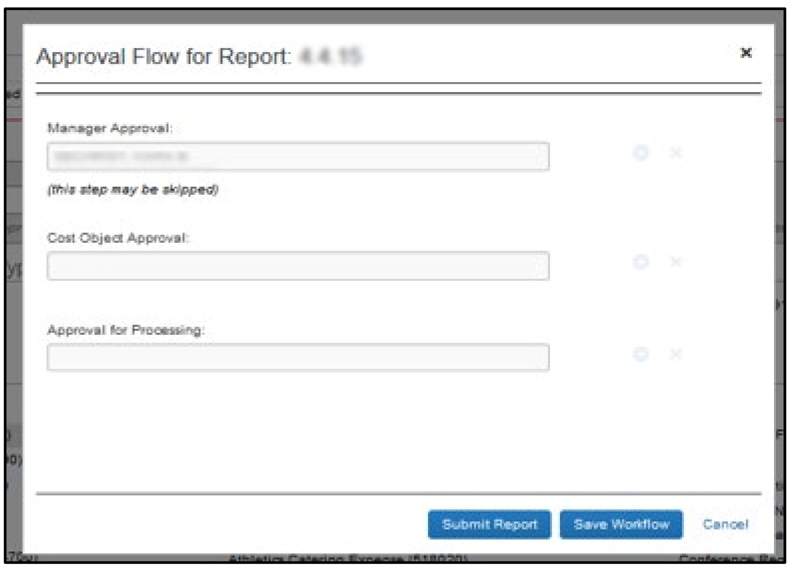


Viewing the Full Approval Flow

To view the full approval flow of an Expense Report, open the report, click on **Details** heading and select **Approval Flow** from the drop-down list.



Expense Reports in Concur begin with a three-step approval flow: Manager (Supervisor) Approval → Cost Object Approval → Approval for Processing (shown below)



Manager (Supervisor)

Cost Object Approver

Approval for Processing (accounting review conducted by Travel & Card Services Team)

Manager Approval

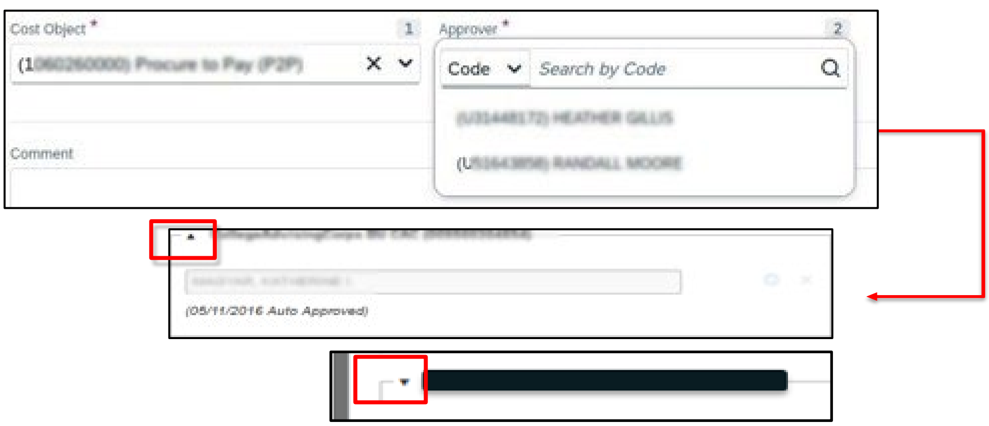
- The Manager approver is generated by SAP HCM and feeds into Concur daily. Your manager in Concur will be the person to whom you report (your "Supervisor" according to your department organizational chart).
- Regardless of whether your Expense Report was for work completed outside of your regular department 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.

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.
- To view Cost Object Approvers, click 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 buinfosec@bu.edu.
- **Note: It is now required that you select your Cost Object Approver when completing the Report Header for a Non-Travel Expense Report.** The names of the financial approvers for the Cost Object you selected will be listed in the Approver drop-down. For Non-Travel Expense Reports, Cost Object Approver selection occurs only at the header level.

  Important Note: If the submitter is also a Cost Object Approver for the selected Cost Object, they cannot choose themselves as the Cost Object Approver. Doing so will cause a workflow error**. Submitter must choose a Cost Object Approver other than themself as listed in the drop-down.**

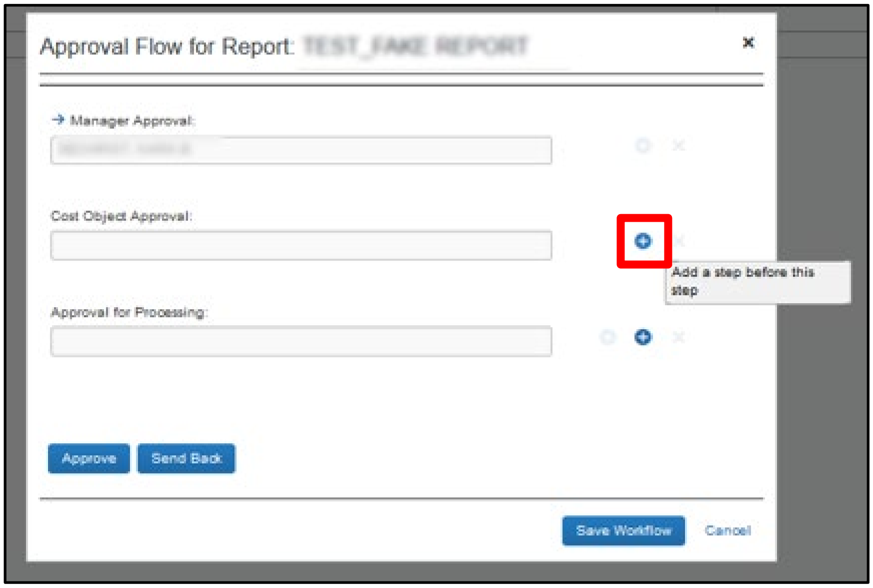
  If you allocate to different accounts at the line-item level of a Non-Travel Expense Report and need to include additional approvers (aside from the supervisor and Cost Object Approver selected at the header level), the supervisor or Cost Object you selected will be responsible for adding any additional approvers.



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

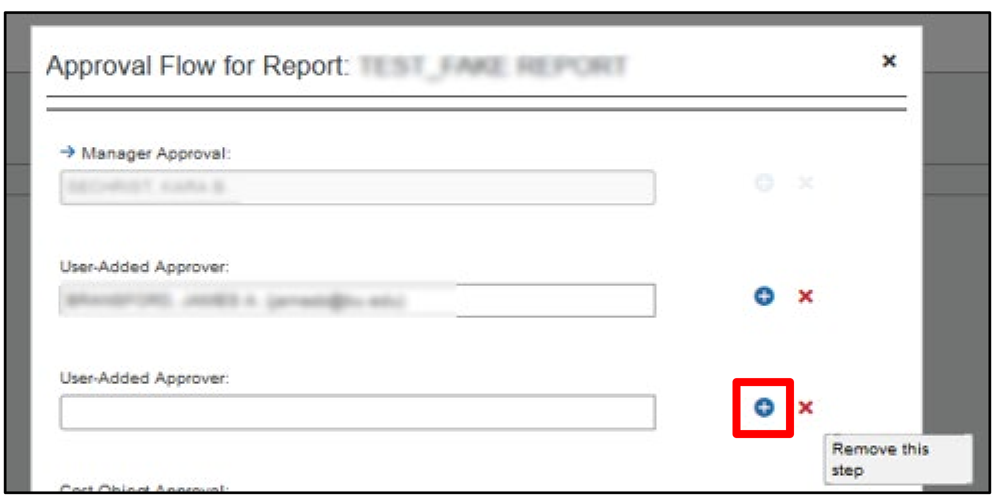
User-Added Approver

The standard approval flow follows three steps; however, approvers can manually add other approvers to the workflow by adding clicking the blue "**+**" button to the right of the desired approval level.



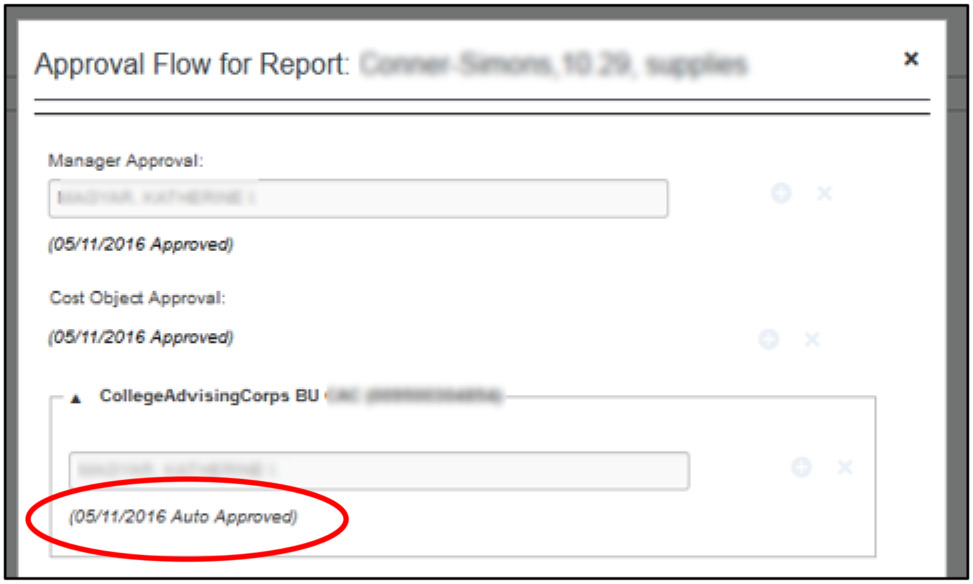
- **As depicted above, you can add an approver <u>before</u> the desired step, but not after it.** This means the <u>Supervisor</u> could add an approver before the report goes to the Cost Object Approver or before it is sent to accounting review, but the <u>Cost Object Approver</u> can only add an approver 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 selecting 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 Carry-Forward

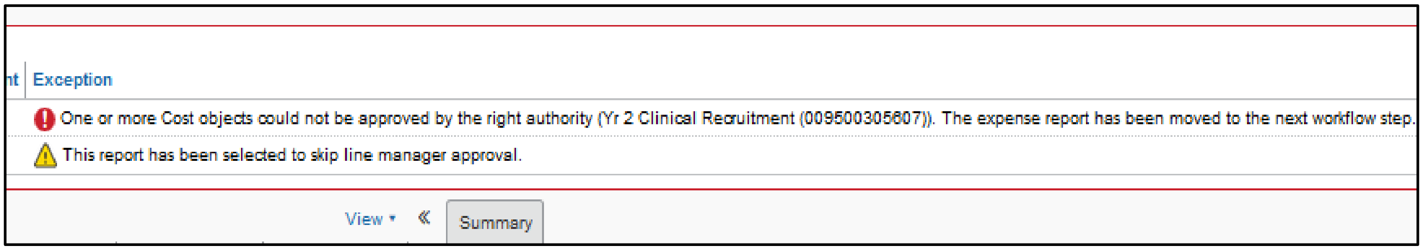
If an approver holds more than one approval role, that individual's approval will automatically apply to the following level of approval, meaning the individual will only receive the report once to approve. This results in an "auto approval," as shown below.



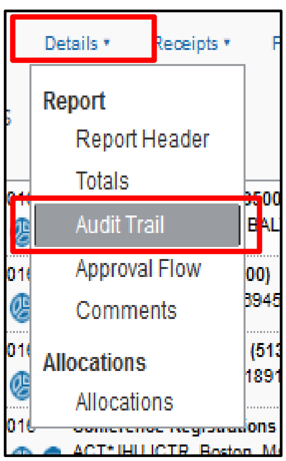
In the example above, the Supervisor approver and Cost Object Approver are the same; so, the report was "Auto Approved" at the Cost Object level once it was approved at the supervisor level.

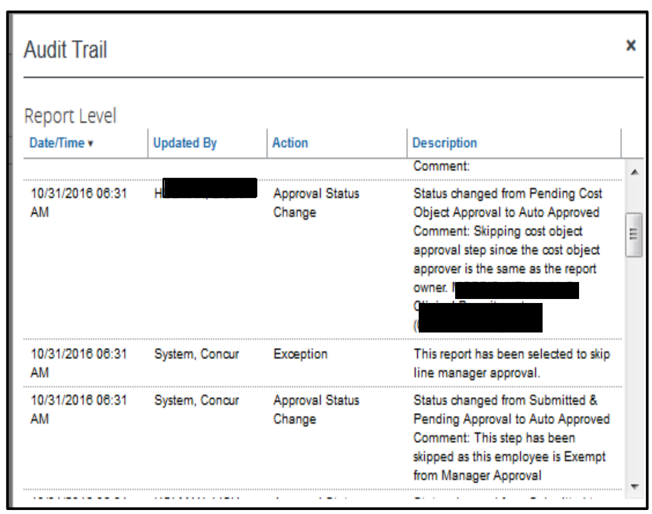
Exceptions Within a Report

Exceptions within the report may cause the report to not follow the standard three-step approval flow.



- 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. This typically means that the submitter does not have a supervisor correctly set up in SAP HCM. To fix this, the department should work with their hiring manager and/or email HRIS a hrsys@bu.edu to have their organization chart updated.
- 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.





Some reports may contain both exceptions, while others may contain just one of the two. Neither exception should be cause for concern.

To add a different approver to the approval flow, the department must create a ticket in the [Financial Affairs Customer Service Portal] and include the name of the desired approver as well as the Report Number [Reference: How to Find the Report Number].

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.

- 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