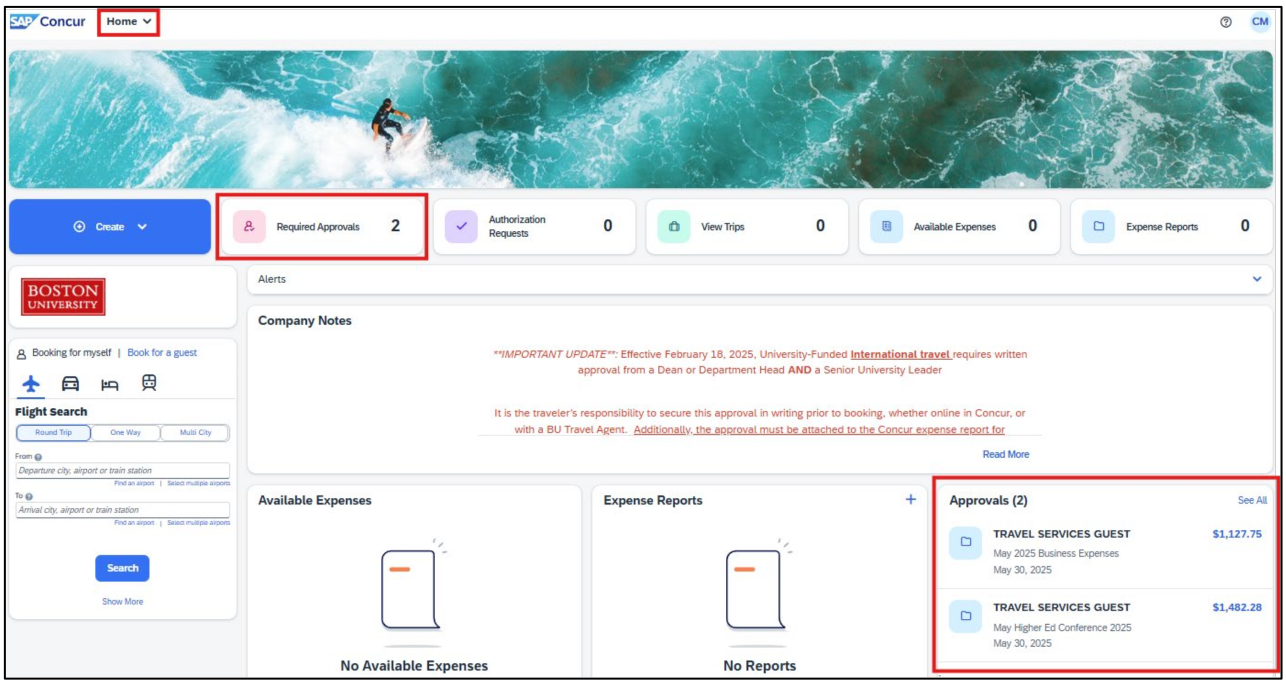
BU Procure to Pay

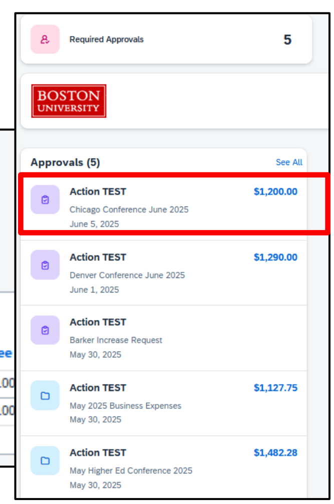
HOW TO APPROVE A TRAVEL EXPENSE REPORT

An Expense Report must be approved by an Approver before the report can proceed through the workflow. An 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 Approver.

1. Log in to Concur, click on the **Home** button in the right corner and select **Approvals** from the drop-down menu. Alternatively, access requests pending approval in the Required Approvals section or at the bottom of the home page in the Approvals section.



2. View the items pending your approval in the **Expense Reports** tabs. Work the count to zero to complete your approval tasks.
3. Click on an Expense Report to review the details.



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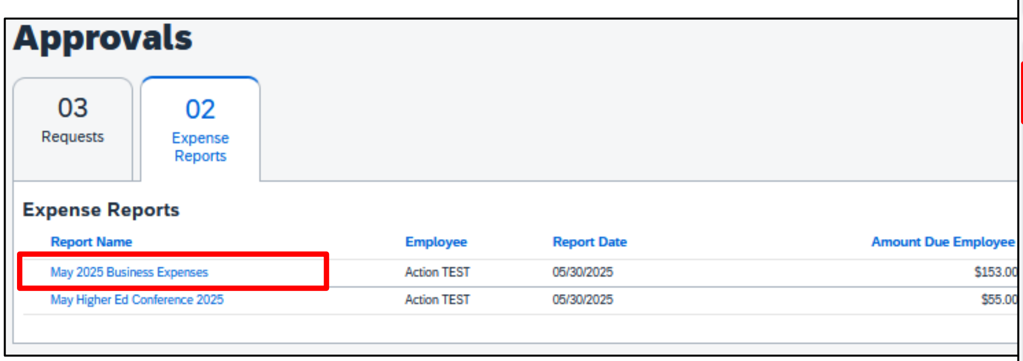
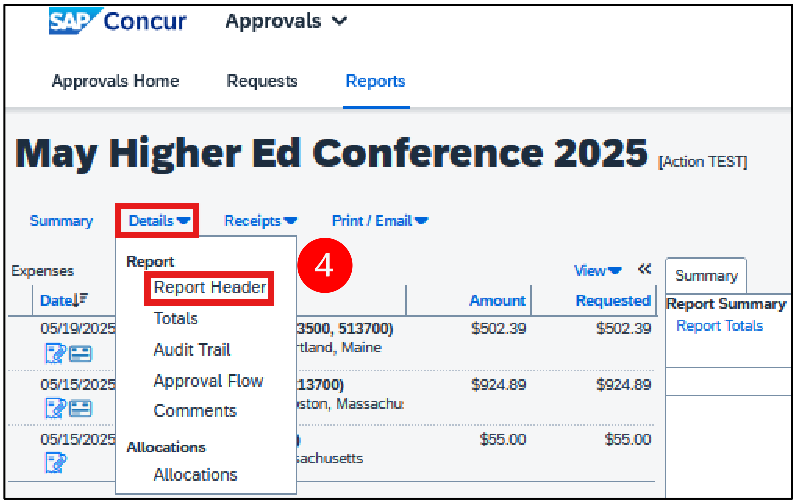
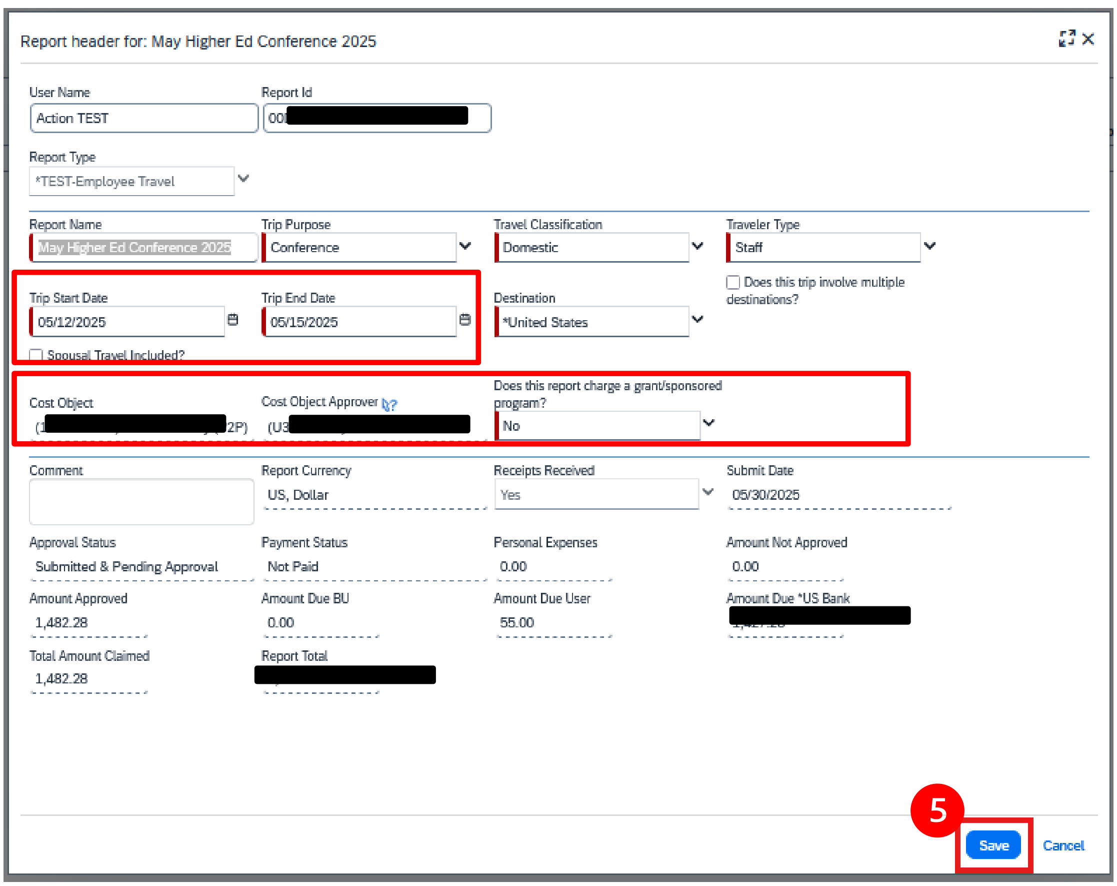


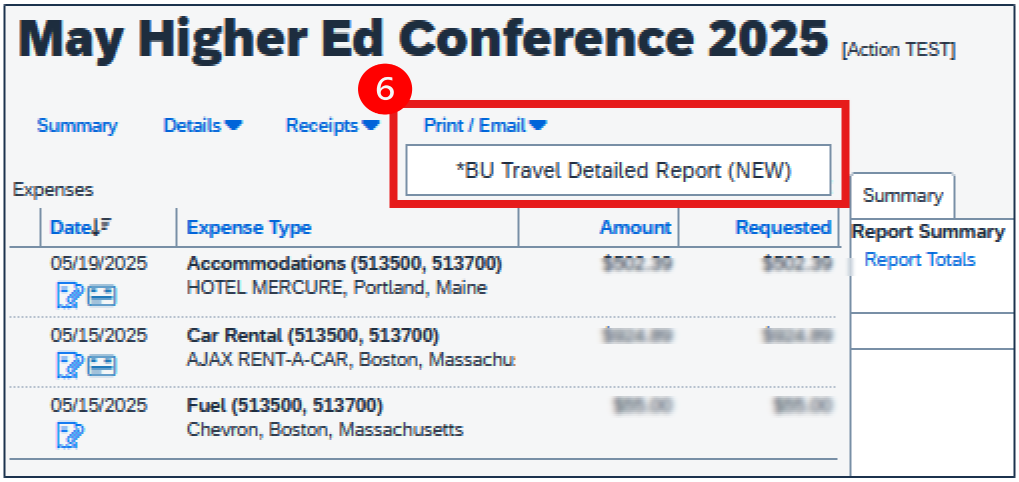
4. Review the report, click on **Details** and select **Report Header** from the drop-down list.



5. Review report header details (e.g., trip start date, trip end date, cost object being charged, cost object approver). 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.



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



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

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Cost Object Allocation Summary

Cost Object	Amount
[illegible]	$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

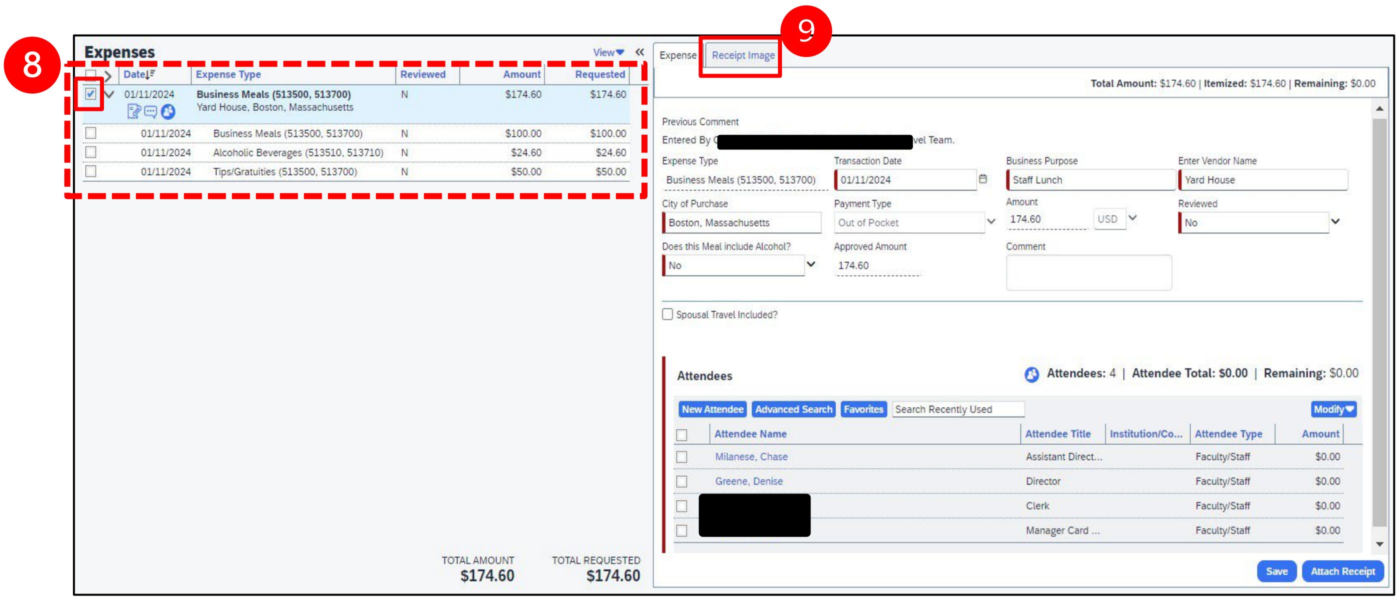
Payment Type	Amount
Out of Pocket	$55.00
Test CBCP	$1,427.28

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**

8. The **Expenses** section displays detailed information on the expense types claimed. Click on expense lines along the left side to see details displayed in the Expense Report window 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.

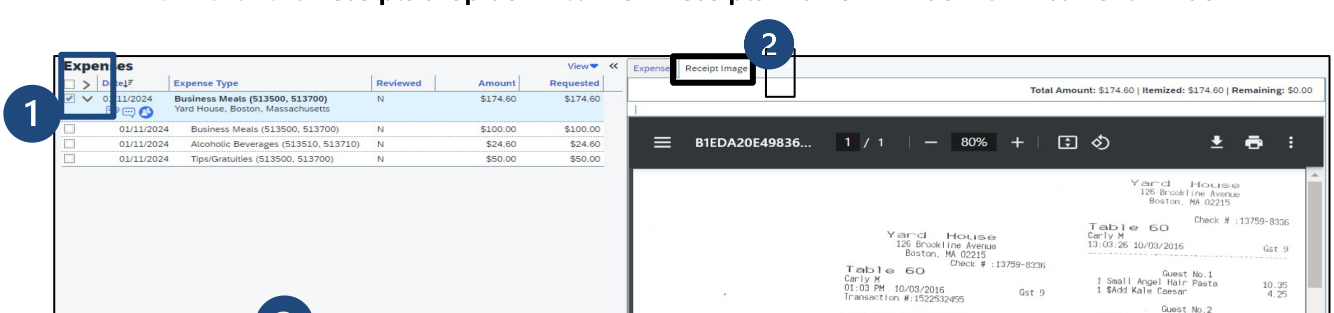
9. After reviewing the expense information, review the **Receipt* Image** and repeat the process for all expenses **$25.00 and greater**.

   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:

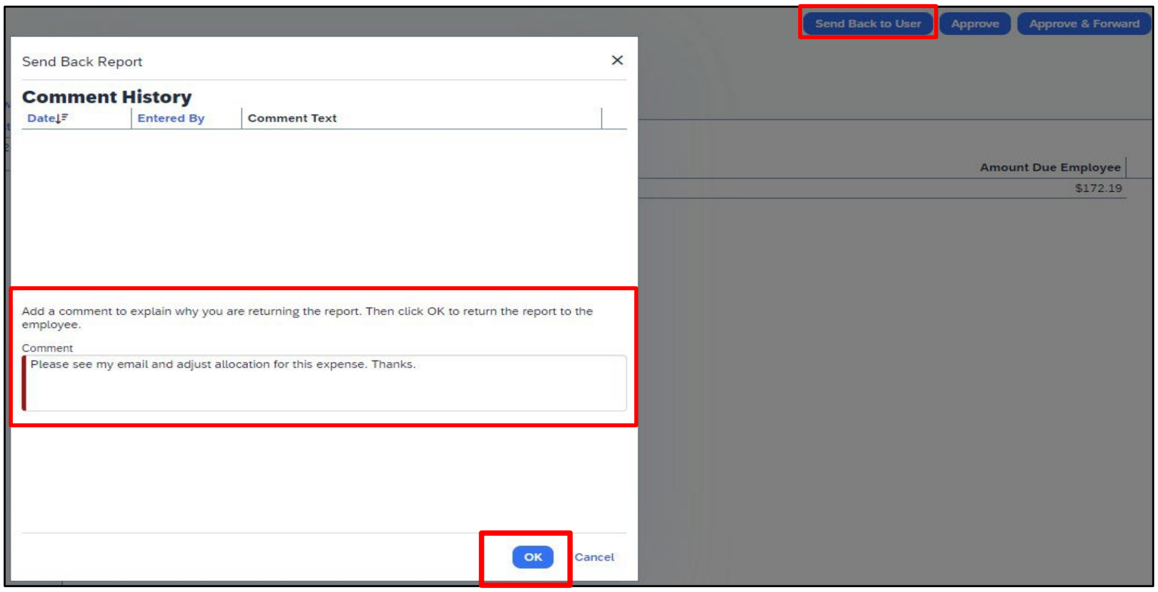
1. Hover over the receipt icon to the left of the expense
2. Select the individual expense and hitting the **Receipt Image** tab to the left of the Expense tab
3. Click the **Receipts drop-down** to **View Receipts in a new window** or **in current window**



10. Once you have finished reviewing the report, your final step is to **approve** or **reject** the report.

As an expense approver, you are also able to make changes to a report's Cost Center or allocate individual expense items [Reference: "How to Allocate Expenses in an Expense Report" training guide].

- Click **Send Back to User** to request that changes be made. Enter a detailed **comment** to explain why you are returning the report. The report will be sent back to the submitter so they can make changes and resubmit.



- Click **Approve** if the Expense Report passes review and you want to move the report to Accounting Review, which is the final step before it is sent for payment.
- Click **Approve & Forward** if the Expense Report passes review but you would like to add another approver to the workflow to review before the report reaches Accounting Review.