

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.

The screenshot shows the Concur Home dashboard. At the top, the 'Home' button is highlighted with a red box. Below it, the 'Required Approvals' tab is highlighted with a red box, showing a count of 2. To the right, the 'Approvals (2)' section is highlighted with a red box, showing two pending reports: 'TRAVEL SERVICES GUEST' for May 2025 Business Expenses and 'TRAVEL SERVICES GUEST' for May Higher Ed Conference 2025.

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.

The screenshot shows the Concur Approvals page. The 'Expense Reports' tab is selected, showing a list of reports. The 'May 2025 Business Expenses' report is highlighted with a red box. A red circle with the number 3 is next to the 'Expense Reports' tab. A sidebar on the right shows the 'Approvals (5)' list, with the 'Action TEST' report for Chicago Conference June 2025 highlighted with a red box.

Report Name	Employee	Report Date	Amount Due Employee
May 2025 Business Expenses	Action TEST	05/30/2025	\$153.00
May Higher Ed Conference 2025	Action TEST	05/30/2025	\$55.00



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

SAP Concur Approvals

Approvals Home Requests Reports

May Higher Ed Conference 2025 [Action TEST]

Summary Details Receipts Print / Email

Expenses

Date	Amount	Requested
05/19/2025	\$502.39	\$502.39
05/15/2025	\$924.89	\$924.89
05/15/2025	\$55.00	\$55.00

Report Header

Totals

Audit Trail

Approval Flow

Comments

Allocations

- 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.

Report header for: May Higher Ed Conference 2025

User Name: Action TEST Report Id: 00

Report Type: *TEST-Employee Travel

Report Name: May Higher Ed Conference 2025 Trip Purpose: Conference Travel Classification: Domestic Traveler Type: Staff

Trip Start Date: 05/12/2025 Trip End Date: 05/15/2025 Destination: *United States

Does this trip involve multiple destinations?

Cost Object: (US) Cost Object Approver: (US) Does this report charge a grant/sponsored program? No

Comment: Report Currency: US, Dollar Receipts Received: Yes Submit Date: 05/30/2025

Approval Status: Submitted & Pending Approval Payment Status: Not Paid Personal Expenses: 0.00 Amount Not Approved: 0.00

Amount Approved: 1,482.28 Amount Due BU: 0.00 Amount Due User: 55.00 Amount Due *US Bank: 1,482.28

Total Amount Claimed: 1,482.28 Report Total: 1,482.28

Save Cancel



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.

May Higher Ed Conference 2025 [Action TEST]

Summary Details Receipts **Print / Email**

*BU Travel Detailed Report (NEW)

Expenses

Date	Expense Type	Amount	Requested
05/19/2025	Accommodations (513500, 513700) HOTEL MERCURE, Portland, Maine	\$502.39	\$502.39
05/15/2025	Car Rental (513500, 513700) AJAX RENT-A-CAR, Boston, Massachu	\$924.89	\$924.89
05/15/2025	Fuel (513500, 513700) Chevron, Boston, Massachusetts	\$55.00	\$55.00

Summary

Report Summary
Report Totals

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
UNIVERSITY (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



- 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.
- 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.

The screenshot shows the Concur Travel interface. On the left, the **Expenses** list is displayed with columns: Date, Expense Type, Reviewed, Amount, and Requested. A red dashed box highlights the first expense line: 01/11/2024, Business Meals (513500, 513700), Yard House, Boston, Massachusetts, N, \$174.60, \$174.60. A red circle with the number 8 is next to this box. On the right, the **Receipt Image** details are shown. A red circle with the number 9 is next to the 'Receipt Image' tab. The details include: Previous Comment, Entered By, Expense Type, Transaction Date, Business Purpose, Enter Vendor Name, City of Purchase, Payment Type, Amount, USD, Reviewed, Does this Meal include Alcohol?, Approved Amount, Comment, Spousal Travel Included?, Attendees (4), Attendee Total: \$0.00, Remaining: \$0.00, and a table of attendees.

Attendee Name	Attendee Title	Institution/Co...	Attendee Type	Amount
Milanes, Chase	Assistant Direct...		Faculty/Staff	\$0.00
Greene, Denise	Director		Faculty/Staff	\$0.00
	Clerk		Faculty/Staff	\$0.00
	Manager Card ...		Faculty/Staff	\$0.00

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

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

The screenshot shows the Concur Travel interface. On the left, the **Expenses** list is displayed. A red circle with the number 1 is next to the first expense line. On the right, the **Receipt Image** details are shown. A red circle with the number 2 is next to the 'Receipt Image' tab. A red circle with the number 3 is next to the 'Receipts' drop-down menu. The drop-down menu options are: View Receipts in new window, View Receipts in current window, and Attach Receipt Images.



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.