How to Approve Expense Reports in Concur

This Quick Reference Guide demonstrates how Expense Approvers access, review, and approve expense reports in the Concur system.

An email will be sent to the Approver from AutoNotification@concursolutions.com when an Expense Report requires approval.

From the Concur home screen, Reports pending approval can be found in three places: the upper left and right sides of the page, and under My Tasks at the bottom left of the page.

Select one of options- this will display the available reports to approve.
1. Select and click the Report Name to begin review.

2. Click on the Details drop down menu and Select Report Header to review the trip details.

3. Click Save or Cancel to exit Report Header screen.

In the Report Header, you can review the details of the report such as the purpose for the travel, the start date and end date of the trip, and any comments.
Click on the **Print/Email** drop down menu and select **MTU-Detailed Report with Summary Data**. Review detail and then exit the window.

The first section in the **MTU-Detailed Report with Summary Data** will be the information contained in the report header; scroll past this to the **Expense detail**. This is the fastest way to view each of the allocations contained in the report.
5 Click on **Details** and then **Allocations**. Select the expenses to view by checking the box(s). Click **View** and then **Summary**. Review the Allocation Summary and then exit the window.
6. On the left-hand side, click on each **Expenses** line item you would like to review. The Expense detail is shown in the gray box to the left. Note: If there are multiple line items in the **Expenses** list you can sort by clicking on the corresponding column header.

7. After reviewing the Expense entry level information, review the **Receipt** image*

7b. Review attached image and repeat process for all **receipts**.

8. Expand expenses by selecting the radial to the left to view itemizations.

*Receipts can be reviewed by hovering over the receipt icon to the left of the expense.*
As an Approver you are also able to make changes to a report’s Expense Type (account code) or allocate individual expense items. See Appendix A.

If Changes need to be made click **Send Back to User** button. Enter a detailed **Send Back Comment** and click **OK** button at bottom of screen. You have sent the report back to the creation profile for the **Submitter** to make changes and resubmit.

If the Expense Report passes audit but you would like to add another Approver to the workflow, hit **Approve and Forward**. The expense report will move on to another approver prior to reaching Accounting Review.

If the Expense Report passes audit click the **Approve** button. You have now moved the report on to Accounting Review, the final step before it is sent for payment.
Appendix A

As an Approver you are able to make changes to a report’s Expense Type (account code) or Allocations (indexes). If you choose to make changes, instead of clicking **Send Back to User**, below will demonstrate where to navigate to make changes.

<table>
<thead>
<tr>
<th>As an Approver, you may:</th>
<th>As an Approver, you may not:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Change an <strong>Expense Type</strong></td>
<td>- Create a new itemization</td>
</tr>
<tr>
<td>- Change an <strong>Index</strong></td>
<td></td>
</tr>
<tr>
<td>- Change an <strong>Allocation</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Change Expense Type

12. On the left-hand side, click on each **Expenses** line you would like to review. The Expense detail is shown in the gray box to the left.

13. To change the **Expense Type**, select the drop-down and click on the correct expense. Click **Save**.
# Change Allocation on expense line

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>View the <strong>Allocations</strong> by <strong>Percentage</strong> or <strong>Amount</strong>. Click in the field to change, make change(s), and <strong>Save</strong>.</td>
</tr>
<tr>
<td></td>
<td>To <strong>Delete</strong> an <strong>Allocation</strong>, select the line by checking the box, click <strong>Delete Selected Allocations</strong>.</td>
</tr>
<tr>
<td></td>
<td>To add an Index, click <strong>Add New Allocation</strong>, make change(s), and <strong>Save</strong>.</td>
</tr>
<tr>
<td></td>
<td>Click on the upper right <strong>X</strong> to close.</td>
</tr>
</tbody>
</table>

To view an **Allocation Summary** of the report, go to Step 5.
Click **Approve**. When you make changes on a report, you may have changed the Cost Object workflow (otherwise known as the Approval workflow). A **Comment** is required which will let the Submitter and other Approvers know why a change was made. Click **OK**.