Concur Expense Report Approvers

I. What is a Expense Report Approver? ................................................................. 1

II. Travel Approval and Workflow ........................................................................ 1

III. Expense Report Approval Request Notification ........................................... 3

IV. Accessing Concur and Reviewing Assigned Expense Reports .................... 3

V. Reviewing and Approving an Expense Report in Concur ............................ 4

VI. Questions? .......................................................................................................... 13
I. What is a Expense Report Approver?

Each home department will have a designated approver for all expense reports. Designation is assigned in Privilege Management by role titled Expense Report Approver. Expense Report Approvers are required to review all assigned expense reports in the Concur application to verify completeness, accuracy, and compliance. Expense Report Approvers may assign an Approver Delegate in Concur when out of the office. Expense Report Approvers and Approver Delegates may forward to additional Approvers in Concur if expenses are tied to multiple cost centers or grant approval is needed.

II. Travel Approval and Workflow

The following steps will be completed in the approval process:

1. Concur will automatically send expense reports to the designated Expense Report Approver when a traveler submits an expense report.
2. Expense Report Approvers will be notified by email to log into Concur to review submitted expense reports.
3. Expense Report Approvers will then complete one of three options:
   a. Submit Back to Employee – used when suggesting modifications to existing expense reports before final approval. The traveler will then make modifications and resubmit the Expense Report Approver.
   b. Approve and Forward – used only when the existing Expense Report Approver needs additional approval for cost center allocations outside of their purview or for grant approval. The existing Expense Report Approver approves the report when using this option, but should also makes notes in the comments section of the header for the subsequent approver to perform final approval.
   c. Approve – used to perform final approval of the expense report to submit for reimbursement to the traveler.
Approvers may also designate a temporary approver to receive all approval requests when they are out of the office. This designation is performed in their Concur profile by the following process:

1. **Click Expense Delegates**

![Expense Delegates](image1)

2. **Click the check box in the Can Approve Temporary field** and designate the starting and ending dates for approval coverage. The Can View Receipts check box is automatically checked, and you should also check the Receives Approval Emails check box.

![Expense Delegates](image2)

3. **Click the Save button** to save your changes.
III. Expense Report Approval Request Notification

The Concur application will send email notifications to both the Traveler and the Approver notifying them of any status changes including submission to approver, sent back to employee, approve and forward, and final approval. Email settings can be changed in your Concur Profile under Travel Preferences and System Settings.

IV. Accessing Concur and Reviewing Assigned Expense Reports

The Concur application can be accessed (after July 30, 2013) through single sign on using your VuNet ID and ePassword via a link in Ebiz and on the Travel Office website.

- [http://www.vanderbilt.edu/ebiz/](http://www.vanderbilt.edu/ebiz/)
- [https://www4.vanderbilt.edu/travel/](https://www4.vanderbilt.edu/travel/)

Once logged into the Concur application, you can open your Expense Report List pending your approval work queue by clicking the **Approve Reports** link.

Once opened, you will send your list of expense reports pending approval. You can access an expense report by clicking on the blue name link in the Report Name field.
V. Reviewing and Approving an Expense Report in Concur

Expense Report Approvers must make sure that an Expense Report is accurate, complete, and in compliance with the Vanderbilt Travel Policy. Expense Report Approvers have the ability to request changes to the Expense Report prior to approval. All fields must be complete in order to approve the Expense Report.

Reviewing an Expense Report

1. Once you have accessed a specific expense report, you can review expenses and attached items on the report using several tools.

2. Hover over the green receipt icon to view attached receipts.
3. Hover over the light blue E-receipt icon to view electronic receipts sent from the vendor.

4. Review the Exceptions area at the top to review any policy exception warnings attached to an expense. Exception warning icons are also visible on the expense line item.
5. Click on an individual expense line item to open the expense details screen to the right of the list of expenses. Here you can get a more detailed view of the details including payment type, amount and any comments which may help justify the expense.

6. Click the Details drop down menu at the top of the expense report, and select Allocations to view cost centers associated with this report.
7. A pop-up window will appear showing percentages and allocations by cost center.

8. Click the **Cancel** and **Done** buttons when finished viewing the allocations.

9. You may also view all receipts attached to the expense report by clicking the **Receipts** drop down and selecting either “View Receipts in new window” or “View Receipts in current window.”
Send Back to Employee

1. If you wish to send the expense report back to the traveler for modifications before approving the expense report, click on the blue expense report title in the Report Name field for the expense report you wish to view in your work queue.

2. After reviewing the expense report, click the **Send Back to Employee** button in the upper right corner of the Concur application.

3. Enter an explanation of the changes needed in the Comment field in the Send Back Report pop-up window, and click **OK**.

4. An email notification will be sent to the traveler indicating the returned status of the report. The traveler should then make the necessary changes.

5. Once necessary modifications are made, the traveler may submit the expense report back to the Expense Report Approver for final approval.
Approve and Forward

1. If you wish to approve the request and forward to additional approver/s for approval of cost centers outside of your purview or for Federal grant approval, click on the Report Name for the expense report you wish to view in your work queue.

2. After reviewing the expense report, click the Approve and Forward button in the upper right corner of the Concur application.
3. Enter an explanation of why the request is being forwarded in the Comment field in the Approve & Forward Report pop-up window, and click **Approve and Forward**.

4. Click **Accept** on the Final Confirmation page indicating you have reviewed all expenses and corresponding receipts and are confirming appropriateness and compliance of all expenses.
5. A confirmation window will appear showing your approval of the expense report, and the expense report will now be forwarded to the next designated Approver.

6. Return to your Expense Report List pending your approval work queue and repeat the necessary process if there are any remaining expense reports listed. Once you have taken action on all expense reports, the message “No Expense Reports Found” will appear in the expense report list area.

**Approve (Final)**

1. Click on the Report Name for the expense report you wish to view in your work queue.
2. After reviewing the expense report, click the **Approve** button in the upper right corner of the Concur application.

3. Click **Accept** on the Final Confirmation page indicating you have reviewed all expenses and corresponding receipts and are confirming appropriateness and compliance of all expenses.
4. A confirmation window will appear showing your approval of the expense report.

5. Return to your Expense Report List pending your approval work queue and repeat the necessary process if there are any remaining expense reports listed. Once you have taken action on all expense reports, the message “No Expense Reports Found” will appear in the expense report list area.

VI. Questions?

If you have questions, please contact travel@vanderbilt.edu.