

Section 12: Review and Approve Expense Reports

As an approver, you can approve an expense report “as is”; send an expense report back to the employee to modify and resubmit; or adjust the authorized amount of one or more expenses to comply with company policy and then approve the expense report for the lowered amount. (Your company may or may not allow you to adjust authorized amounts.)

If your company uses cost object approval, an employee’s expense report might be sent to multiple approvers at the same time. If one of the approvers makes changes to your expense report, the report might need to go through the approval process again. Cost object approval allows multiple approvers to review a report at once and helps to ensure control, compliance, and visibility of expenses.

Review and Approve an Expense Report

All reports awaiting your review and approval appear in the **Approval Queue** section of **My Concur**.

How to...

1. Click the report name (link) to open the report.

To review the report information, from the **Details** dropdown menu, select **Report Header** (under **Report**).

To review expense entry information, click an expense entry.

When ready to approve, click **Approve**.

Additional Information

The **Expense Report** page appears.

The **Report Header** page appears. Click **Cancel** on the **Report Header** page.

The expense entry details appear on the right side of the page.

The report moves to the next step in the workflow.

Send an Expense Report Back to the Employee

All reports awaiting your review and approval appear in the **Approval Queue** section of the **My Concur** page.

How to...

2. Click the report name (link) to open the report.

Click **Send Back to Employee**.

Enter a comment for the employee, and then click **OK**.

Additional Information

The **Expense Report** page appears.

The **Send Back Report** box appears.

The report is returned to the employee.

Date	Entered By	Comment Text
09/10/2010	Calnan, Erenna M.	

Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.

Comment:

OK Cancel

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Send Single Expenses Back to an Employee

Expense allows you to send back an individual expense item to an employee for correction instead of sending back the entire expense report.

How to...

3. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.

Review the expense report.

Click the expense you wish to send back for correction.

In the expense details sections, select the **Send Back Expense?** checkbox.

Click **Approve**.

Additional Information

The expense report opens.

The expense details appear.

You can send back multiple expenses on an expense report without sending back the entire report. You will repeat the steps for each expense that needs to be sent back.

The screenshot shows the 'Trip to Dallas' expense report interface. At the top, there are buttons for 'Send Back to Employee', 'Approve', and 'Approve & Forward'. Below these are tabs for 'Details', 'Receipts', and 'Print / Email'. The main area is divided into two sections: 'Expenses' and 'Expense'.

Expenses Table:

Date	Expense Type	Amount	Requested
09/16/2010	Car Rental Hertz, Dallas, Texas	\$140.00	\$140.00
> 09/16/2010	Room Rate Marriott Hotels, Dallas, Texas	\$300.00	\$300.00
09/01/2010	Airfare American Airlines	\$350.00	\$350.00

Expense Details:

Expense Type: Car Rental
Transaction Date: 09/16/2010
Business Purpose: [Empty]
Vendor: Hertz
City: Dallas, Texas
Payment Type: Cash
Amount: 140.00 USD
Reviewed: No
Approved Amount: 140.00
Comment: [Empty]
 Personal Expense (do not reimburse)
 Send Back Expense?

TOTAL AMOUNT: \$790.00 | TOTAL REQUESTED: \$790.00

Buttons: Save, Allocate

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Add an Additional Review Step for an Expense Report

Depending on your company's configuration, you can add additional approval steps for an expense report, as needed. For example, if an expense report has an amount that is greater than your authorized approval limit or if the expense report has an allocation to a cost center that is not within your approval authorization, you can manually select the appropriate approver for the report.

How to...

4. On the **My Concur** page in the **Approval Queue** section, click the report name (link) to open the report.

Click **Approve & Forward**.

In the **Approval Flow** window, click the **Search Approvers By** dropdown arrow.

Select the desired search option from the dropdown list.

In the **User-Added Approver** field, type the search criteria.

From the list of options displayed by the search, select the appropriate approver.

Click **Approve**.

Additional Information

The **Expense Report** page appears.

The **Approval Flow** window appears.

A list of search options appears.

The system displays all matches for the search criteria that you entered.

The expense report is forwarded to the selected approver.

The screenshot shows a window titled "Approval Flow for Report: Seattle to LA - Sales Trip". It features several sections for adding approvers:

- Manager Approval:** A text field containing "Falkmore, Artemis N." with a search icon and a close icon.
- User-Added Approver:** An empty text field with a search icon and a close icon.
- Search Approvers By:** A dropdown menu.
- Back Office Approval:** An empty text field with a search icon, a user icon, and a close icon.

At the bottom of the window, there are four buttons: "Approve", "Send Back", "Save Workflow", and "Cancel".

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Adjust Authorized Amounts on an Expense Report

All reports awaiting your review and approval appear in the **Approval Queue** section of the **My Concur** page. Depending on your company's configuration, you might not have the ability to adjust authorized amounts on expense reports.

How to...

5. Click the report name (link) to open the report.

Make the appropriate adjustments, and then click **Save**.

Click **Approve**.

Additional Information

The expense report page appears.

If you have the authority to adjust amounts, then the **Amount** field is editable.

The report moves to the next step in the workflow.