Concur 2.0 – Guide for Approvers

As a Concur approver, you are responsible for reviewing expense reports submitted on the cost object(s) for which you are the approver. When a report comes to you for approval, you will need to review the report header, expense list, itemizations and allocations, and make sure that the required receipts are attached. If a report passes your review, you may approve it. If a report requires changes, you may send it back to the submitter with a comment detailing the necessary changes. The following pages guide you through the approval process in Concur.

For assistance:

Travel Services, Office of the Vice President for Finance

travelsupport@mit.edu

617-253-8366
When a report is submitted using a cost object for which you are the approver, you will receive an email notification from Concur:

![Mail notification](image)

When you receive such an email, enter Concur on your web browser to access and review the report. The following pages outline the basic steps to take when reviewing an expense report as cost object approver.
Within Concur, the pending report will show up under **Required Approvals**.

To enter and review the report, click on the report name.

This will bring you into the body of the report. You will then need to review the report header, match the expense list with the receipts, check itemizations and allocations, and then either approve the report or send it back for changes.
For a clearer list, click the View button and then click Expenses as List.

Click the Amount column header to sort the expenses in descending order.
Click Details > Report Header to review the Report Header.

Within the Report Header, check the Employee Name, Trip Purpose, Cost Object, Trip Start/End Date, Destination and Trip Classification fields. Make sure the report is under the correct employee’s profile, the trip purpose is appropriate, the cost object is correct, the trip start/end dates match the departure, and return dates of the trip. Also, confirm that the Destination and Trip Classification fields match and review any comments in the Comment field for important details.
To open the receipts, click Receipts > View Receipts in new window.

Toggle back and forth between the receipts and the report expense list to make sure all required receipts are attached.
Review any itemized expenses by opening the Itemization Detail (arrow icon). Make sure any alcohol is itemized and any airfare upgrades are itemized as Upgrade Fee or Airfare Difference.

Review any allocations (pie chart icon) to make sure expenses are allocated correctly. Many reports will be allocated between accounts from different departments. When that is the case, only review the amounts allocated to your department's account(s).
To add a general comment to the report, click **Details > Comments**.

If the report passes your review, click **Approve**.
If the report requires changes, click **Send Back to Employee**, list the changes needed, and then click **OK**.

You can also click **Approve & Forward** a report if you want to approve the report and route it to a second person in your department for further review.
You can view reports that you have approved once they have been approved by VPF Travel. To view your approved reports, click Approvals > Reports > View and then select an option from the drop-down menu.

Remember the basic steps to reviewing and approving expense reports:

- **Review the report header**, and confirm the name, dates, trip purpose and classification are correct.
- **Open the receipts** to make sure all the required receipts are included and that anything unallowable or non-reimbursable has been itemized correctly.
- **Check itemizations and allocations** within the expense list.
- Then, **approve the report** or **send back for changes**.
Resources and Policy Notes

Common Send-back Reasons

- Missing receipts/missing itemized receipts
- Business/first class airfare or upgrade fees not itemized
- Missing comments on miscellaneous expenses, other fee, materials, incidentals, etc. all need description confirming their relation to the trip purpose
- Alcohol not itemized
- Meals on hotel bill: need confirmation no alcohol was included or alcohol must be itemized if it was purchased

Unallowable Trip Purposes: May not be used with sponsored cost objects

- Resource Development
- Retreat
- Prospective Student Visit
- President Travel
- Fundraising

Unallowable Expense Types: May not be used with sponsored cost objects:

- Alcohol
- Gift
- Upgrade Fee
  - Airfare Difference (Itemization)
- Entertainment – Other
- Non-Recoverable Expenses
- Misc. Promotional Expense