

Concur Approvers Quick Guide



This Quick Guide details how Concur Approvers review and approve Expense Reports in Concur. For details on the Concur approval workflow, refer to the [Concur Approval Workflow](#) job aid. For a summary of the Concur expense policy exception approval requirements, refer to the [Concur Expense Policy Exception Approval Workflow Requirements](#) job aid.



Approving Expense Reports in Concur

1. Navigate to <https://travel-expense.finance.columbia.edu/>, Log into Concur. Click the Home dropdown and select **Approvals**. The Approvals screen appears.

The screenshot shows the 'Approvals' screen in Concur. At the top, there are tabs for 'Approvals Home', 'Requests', and 'Reports'. Below the tabs, there are two summary boxes: '00 Requests' and '11 Expense Reports'. The main area is titled 'Expense Reports' and contains a table with the following columns: Report Name, Employee, Report Date, Amount Due Employee, and Requested Amount.

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Eric Travel Expenses in Conference in Washin DC	Zaretsky, Eric	02/03/2020	\$1,354.00	\$1,354.00
pr2201 UAT Travel Exceptions Research conference in Washington, DC	Reedy, Paul	12/18/2019	\$1,354.00	\$1,354.00
mm3691 UAT Travel Exceptions research conference in Washington, DC	Meyer, Milca	12/18/2019	\$1,354.00	\$1,354.00
lp10 UAT Travel Exceptions Research conference in Washington, DC	Pereira, Kalia	11/21/2019	\$1,354.00	\$1,354.00
NR2118 UAT TRAVEL EXCEPTIONS RESEARCH CONFERENCE IN WASHINGTON, DC	Cuffy, Nancy	11/21/2019	\$1,374.00	\$1,374.00
LR2355 UAT TRAVEL EXCEPTIONS RESEARCH CONFERENCE IN WASHINGTON DC	Romero, Leonor	11/20/2019	\$1,354.00	\$1,354.00
ls2006 UAT Travel Exceptions Research conference in Washington, DC	Scott, Toni	11/20/2019	\$1,354.00	\$1,354.00
je2581 something	Espinal, Jeny	11/18/2019	\$1,354.00	\$1,354.00

2. Select the link for the Report you want to review. The Report screen appears.

The screenshot shows the 'Report' screen for 'Eric Travel Expenses' (Zaretsky, Eric). At the top, there are buttons for 'Send Back to User', 'Approve', and 'Approve & Forward'. Below the buttons, there are tabs for 'Summary', 'Details', 'Receipts', and 'Print / Email'. The 'Details' tab is selected, and a 'Report Header' window is open. The 'Report Header' window shows a table with columns for 'Amount' and 'Approved'.

Amount	Approved
\$39.00	\$39.00
\$1,200.00	\$1,200.00
\$58.00	\$58.00
\$57.00	\$57.00

At the bottom of the screen, there are two summary boxes: 'TOTAL AMOUNT \$1,354.00' and 'TOTAL APPROVED \$1,354.00'.

3. Click the **Details** dropdown and select **Report Header**. The Report Header window appears.

Report header for: Eric Travel Expenses

Type of Report *CU Travel Expenses	School (140000X) FIN Finance	Division (14AD00X) FIN Administration	Admin Department (1403102) FHR Human Resources
Report Name Eric Travel Expenses	Business Travel Start Date 01/27/2020	Business Travel End Date 02/05/2020	Trip Purpose Conference
Detailed Business Purpose Conference in Washington DC			
Travel Type Individual Travel	Trip Type Domestic	Did this trip include personal travel? No	Personal Travel Dates
Comment	GL BU Columbia University (COLUV)	Department FAC EVP Admin (1202102)	PC Business Unit General Projects (GENRL)
Project GI Funding (UR004672)	Activity ZMBBI (02)	Initiative Undefined Initiative1 (00000)	Segment Undefined Segment (00000000)
Report Id B09627DA8D3A442A1A1	Report Key 816	User Name Zaretsky, Eric	Report Date 02/03/2020
Report Currency US, Dollar	Receipts Received No	Submit Date 02/04/2020	Approval Status Submitted & Pending Approval

Save Cancel

The Header contains basic Report information. It displays School/Department information and the default ChartString, which you can edit, if necessary. You can update the ChartStrings for individual expense lines by clicking the Details dropdown and selecting Allocations. If the Report is for travel, the header displays the travel type, the purpose, and dates.

- Click **Cancel** or, if you made changes, click **Save** to continue reviewing Expense Items.

Approvals Home Requests Reports

Eric Travel Expenses [Zaretsky, Eric] Send Back to User Approve

Summary Details Receipts Print / Email Hide Exceptions



Expense Type	Date	Amount	Exception
Hotel/Lodging	01/29/2020	\$1,200.00	Warning: This itemized entry has sub-entries with one or more exceptions.
Hotel/Lodging	01/27/2020	\$350.00	Warning: This hotel charge is over \$525/might please review the justification.

Date	Expense Type	Amount	Approved
01/29/2020	Daily Meal Per Diem Washington DC, District of Columbia	\$39.00	\$39.00
01/29/2020	Hotel/Lodging DoubleTree Hotels, Washington DC,	\$1,200.00	\$1,200.00
01/27/2020	Hotel/Lodging	\$350.00	\$350.00
01/27/2020	Hotel/Lodging Tax	\$25.00	\$25.00
01/27/2020	Hotel - Segregated	\$225.00	\$225.00
01/29/2020	Hotel/Lodging	\$350.00	\$350.00

COST OBJECT APPROVED AMOUNT \$1,354.00

Expense Type	Transaction Date	Trip Type
Hotel/Lodging	01/29/2020	Domestic

Purpose: Conference
Was a spouse/significant other/dependent present?: No
Subject to Govt (GSA) Rate: No
Vendor Name: DoubleTree Hotels
Lodging Location: Washington DC, District of Columbi
Payment Type: Cash/Personal Credit Card
Amount: 1,200.00 USD
Reviewed: No
Approved Amount: 1,200.00
Comment/Justification:
Save Attach Receipt

- Review all Expense Item lines to ensure compliance with University and School/Department policies. If the Expense Item contains itemizations, click the **Expand** icon  to expand and view. Click the **Expense Item** or **Expense Itemization** to view the Expense Details. For Expense Items requiring Receipts or other documentation, click the **Receipt Image** tab to view.
- Notice the list of **Exception Warnings**  at the top of the report. You can click an Exception Warning to view the Expense Item with the exception. Or, you can view the Expense Items list to see if they contain any exceptions. In the Expense Details, ensure that the Payee has provided the proper **Comment/Justification** and/or documentation to satisfy the approval requirements for the exception. Refer to this [Concur Tip](#) on how Approvers can view comments in Expense Reports. Refer to the [Concur Expense Policy Exception Approval Workflow Requirements](#) job aid for more information regarding policy exception approval requirements and workflow.
Note: If you have the role of Financial Approver or Senior Business Officer, you may add a Comment/Justification to acknowledge the exception. For itemized expenses, enter the comment at the parent level.
- Click **Approve** if you find no issues or problems with the Report. If you find any issues the Payee must address, click **Send Back to User** and enter a required Comment to explain why you are returning the Report.
 - For more information on how to view the approval status of an Expense Report that you approved, refer to this [Concur Tip](#).
 - To learn how to view previous Expense Reports that you approved, refer to the [Viewing Past Concur Expense Reports](#) job aid.