Travel and Expense Reimbursement

Approving Expenses Reports as a Supervisor

**Supervisor Responsibilities**

The Supervisor role in Concur is assigned to individuals officially designated as time and attendance supervisors. Your responsibilities are to review and approve employee expenses, receipts and supporting documentation on expense reports. If you are also the Cost Approver, you can allocate the expenses. You cannot modify expense reports, but instead must return them to the user so they can correct and resubmit.

In Concur, you can:

- Add comments to reports.
- Approve or return reports.
- Insert an additional approver in the workflow.

**Receive Email Notification**

You will receive email notifications alerting you to review expense reports that have been submitted for approval.

- Periodically check the Junk folder in your email in the event that notification emails were inadvertently sent there.
- Click the link in the email to log in to Concur to access the report.
- As a Supervisor, you have 13 calendar days to take action on an expense report before it is returned to the user.

**Access Pending Approvals**

After logging into Concur, on the home page click Required Approvals in the Quick Task Bar.

**Review Pending Approvals**

1. **Click** on the Report Name link to open the expense report.
2. Review the Report Header for accuracy and completeness:
   - **Click** Details, then click Report Header.
3. **Review** each expense for compliance:
   - Hover over the icons on each expense line item to view required receipts, missing receipt affidavits and to display comments.

4. If you are also the Cost Approver, **allocate** the expenses on the report:
   - Select an expense line item and click Allocate.
   - For more information, refer to the tip sheet Allocating Expenses as a Cost Approver.

**Approve, Forward or Return the Report**

When you are finished reviewing the report, at the top right choose one of the following options:

- **Approve & Forward** — Approve and forward the report if you are not the Cost Approver.
  - You must forward the report to the correct Cost Approver so they can allocate the expenses on the report.
  - In the pop up window search bar, enter the Cost Approver’s **Last Name** or **Email Address**. Select their name and enter a comment. Click Approve & Forward.
  - Read the Final Confirmation statement and choose to **Accept** or **Decline**.
- **Approve** — Approve the report if you are both the Supervisor and Cost Approver. Ensure that you reviewed the report, allocated the expenses and verified the report is correct.
  - Click Approve. Read the Final Confirmation statement and choose to **Accept** or **Decline**.
- **Send Back to User**— Send the report back to the user if it requires correction. Supervisors cannot modify expense reports.
  - In the pop up window comment field, enter a clear explanation of the problem. Click OK

**View Reports Approved in the Past**

To view previously approved reports, click Approvals in top menu bar, then at the top click Reports.

1. **Click** View for search options. Select the timeframe you would like to view.
2. **Search** for a specific report by Report Name, Employee Name or Amount.

For Concur support, email ubs-travel-expense-support@buffalo.edu