Travel and Expense Reimbursement

Approving Expense Reports as a Supervisor

The supervisor role is assigned to individuals officially designated as time and attendance supervisors. Supervisors are responsible for reviewing and approving employee expense reports and can:

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

1. Receive Email Notification

- Supervisors receive email notifications when expense reports are submitted for their approval, and have 13 days to take action on an expense report before it is returned to the user.
- Click the link in the email to log into Concur to approve the report.

2. Go to Required Approvals

- There are several ways to go to your required approvals from the home page (Figure 1):
  - Click Required Approvals in the Quick Task Bar.
  - Click Required Approvals in My Tasks.
  - Click Approvals in the top menu bar.

[Figure 1 image]

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3. Review Reports Pending Approval
   - Select a report pending approval. Click on the report name to open it.
   - Review the report header for accuracy and completeness:
     - Click Details, then click Report Header. Review then click to Save or Cancel.
   - Review each expense for compliance.
   - Review issues and exceptions on the report:
     - If an error needs to be corrected by the user, at the top click Send Back to User.
     - Yellow exceptions appear as informational warnings on the report, and may have no action that is required. These will not prevent you from approving the report (Figure 2).

4. If You Are Also the Cost Approver, Allocate the Expenses
   - If you are both the supervisor and the cost approver, allocate the expenses to the correct account.
   - For more information, refer to the tip sheet Allocating Expenses as a Cost Approver.

5. Approve, Forward or Return the Report
   When you are finished reviewing the report, at the top choose one of the following options:
   - Send Back to User — Send the report back to the user if it requires correction. As a supervisor, you cannot modify expense reports.
     - In the comment field, provide a clear explanation of the problem. Click OK.
   - Approve — Approve the report if you are both the supervisor and cost approver. Ensure that you reviewed the report and allocated the funds.
     - Click Approve. Read the Final Confirmation statement and click to Accept or Decline.
   - Approve & Forward — If you are not the cost approver, approve and forward the report.
     - You must forward the report to the correct cost approver so they can allocate the expenses.
     - In the search bar, enter the additional approver’s Last Name or Email Address.
       - Select their name and enter a comment. Click Approve & Forward.
       - Read the Final Confirmation statement and click to Accept or Decline.

6. View Reports Approved in the Past
   - To view reports you previously approved, click Approvals in top menu bar, then click Reports at the top.
   - Click View for dropdown menu options and select the timeframe you would like to view.
   - You may also search for a specific report by Report Name, Employee Name or Amount.

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