

University of Houston Concur Instructions

Approving an Expense Report

Step 1: In your Concur main page, click on “Required Approvals” on the header menu. Click on the Expense Reports tab.

The screenshot shows the SAP Concur main page header. The navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. A red arrow points to the 'Required Approvals' tab, which is highlighted in yellow and shows a count of '03'. Other tabs include 'New', 'Authorization Requests' (01), 'Available Expenses' (00), and 'Open Reports' (00). Below the navigation bar, there are sections for 'TRIP SEARCH' and 'ALERTS'. An alert message states: 'As an employee of University of Houston System, you are eligible for a free Triplt Pro subscription. Learn More and Activate Not right now'.

Click on the Expense Reports tab (if not selected already). Then click on the document ID of the Expense Report that you want to approve.

The screenshot shows the SAP Concur 'Approvals' page. The 'Approvals' tab is selected in the navigation bar. Below the navigation bar, there are tabs for 'Approvals Home', 'Requests', and 'Reports'. The 'Expense Reports' tab is selected and highlighted in yellow. Below the tabs, there is a table with the following data:

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Traveler, L. Austin 091022 Attend Conference	Traveler, Linda	09/14/2022	\$1,145.00	\$1,145.00

A red arrow points to the document ID '091022' in the 'Report Name' column.

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Step 2: Review the corresponding Travel Request summary (Request).

Click on the document ID of the Travel Request name under “Requests”.

The screenshot shows the SAP Concur interface for an expense report. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The main header shows 'Traveler, L. Austin 091022 [Traveler, Linda]' with buttons for 'Send Back to Employee', 'Approve', and 'Approve & Forward'. Below the header are tabs for 'Summary', 'Details', 'Receipts', and 'Print / Email'. A table of expenses is displayed, with a red arrow pointing to the 'Requests' section. The 'Requests' table has the following data:

Request Name	Request ID	Amount Approved	Amount Remaining
Traveler, L. Austin 091022	A99W	\$1,400.00	\$1,373.00

Travel Request information will be displayed to review.

Request Summary

Request ID : **A99W**
 Name : **Traveler, L. Austin 091022**
 Minimum Departure Date : **09/10/2022**
 Approval Status : **Approved**
 Total Approved Amount : **\$1,400.00**

Traveler Profile

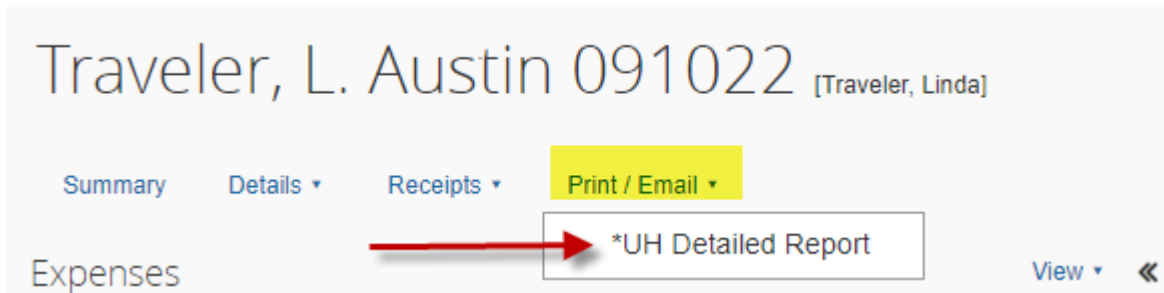
Traveler First Name : **Linda**
 Traveler Last Name : **Traveler**
 ID : **0000001**
 Email Address :
 Default Manager Name : **Supervisor, Kevin**
 Default Manager Email :
 Country of Residence : **UNITED STATES**
 Business Unit : **University of Houston**
 Department : **H0116 DEAN, PHARMACY**
 Fund Type : **LOCAL**
 Fund Code : **2080**
 Program : **D0823**
 Project : **NA**

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Step 3: Review the Expense Report (Expense).

Go to the Print/Email tab and cselect the “UH Detailed Report”.



The system will display the Expense Report information. Place a checkmark to “Show Itemizations”.

Show Expenses Show Itemizations PDF Email Print Close

Expense Report
Report Name : Traveler, L. Austin 091022

Employee Name : Traveler, Linda T.
ID : 0000001

Report Header
Policy : *UH Expense Policy
Business Purpose : Attend Conference
Report Id : 5527982453AF49D8B269
Receipts Received : Yes
Report Date : 09/14/2022

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Step 4: Review the receipts.

All of the attached documents can be viewed by selecting “Receipts”, followed by either “View Receipts in new window” or “View Receipts in current window”. Individual receipts can be viewed by hovering over the blue icon next to each expense type, or selecting an expense type, followed by “Receipt Image”.

Traveler, L. Austin 091022 [Traveler, Linda]

Summary Details **Receipts** Print / Email

Expenses

Date	Expense	Amount	Requested
09/12/2022	Meal for Austin, Texas		\$45.00
09/10/2022	Hotel Room Only Hilton Hotels, Houston, Texas	\$600.00	\$600.00
09/01/2022	Airfare (Reimburse) Houston, Texas	\$500.00	\$500.00

Expense Type: Meal for Traveler Only
Amount: 45.00 USD
Transaction: 09/12/2022
City of Purchase: Austin, Texas
Reviewed: No
Business Unit: (00730) U

Step 5: Approve or send back the Expense Report.

Select “Approve” to approve.

Select “Send Back to Employee” if you want to send the Expense Report back to the employee.

Select “Approve & Forward” to obtain additional approval from an employee (must have a Concur profile) that is not in the workflow. After the additional approval is obtained, the Expense Report will go back into workflow and be placed in the next approver’s queue.

