

## Approve 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 in the system and can:

- Make comments on reports
- Approve or return expense reports
- Forward expense reports to an additional approvers

### 1. Receive Email Notification

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

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' and several menu items: 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. Below this is a 'Quick Task' bar with four items: 'New', '01 Required Approvals', '02 Authorization Requests', and '01 Available Expenses', followed by '06 Open Reports'. The main content area is divided into sections: 'TRIP SEARCH' on the left, 'ALERTS' at the top right, 'COMPANY NOTES' in the center, and 'MY TASKS' at the bottom right. The 'MY TASKS' section contains three items: '01 Required Approvals', '01 Available Expenses', and '06 Open Reports'. The 'Approvals' menu item in the top bar and the '01 Required Approvals' item in the 'MY TASKS' section are highlighted with red boxes.

Figure 1

For travel and expense system support, email [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu)

### 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 exceptions for errors 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).

 Please enter Funding Source, Entity & Account in the allocation.

Figure 2

### 4. If You Are Also the Cost Approver, Allocate Expenses

- If you are also the cost approver on the account being used, allocate the expenses.
- For more information, refer to the tip sheet [Allocate Expenses as a Cost Approver](#).

### 5. Approve, Forward or Return 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. Supervisors cannot modify expense reports.
  - In the comment field, provide a clear explanation of the problem then click *OK*.
- *Approve* — approve the report if you are the cost approver and **allocated the expenses**.
  - Click *Approve*. Read the *Final Confirmation* statement and click to *Accept* or *Decline*.
- *Approve and Forward* — if you are not the cost approver, approve and forward the report to the correct cost approver so they can allocate the expenses.
  - In the search bar, enter the cost approver's *Last Name* or *Email Address*.
    - Select their name and enter a comment. Click *Approve and Forward*.
    - Read the *Final Confirmation* statement and click to *Accept* or *Decline*.

### 6. View Previously Approved Reports

- 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 want to view.
  - You may also search for a specific report by *Report Name*, *Employee Name* or *Amount*.