

# What Can An Approver Do?



Once an expense report is submitted by a user, the report must be reviewed and approved by one or more approvers before reimbursement for the expenses can be processed. Approvers must confirm that the report is accurate, sufficiently documented, and consistent with University and TUB-specific policies and guidelines.

For additional job aides, references and FAQs, please visit: [travel.harvard.edu/concur](http://travel.harvard.edu/concur).

Harvard User Support: [concurhelp@harvard.edu](mailto:concurhelp@harvard.edu) or 617-495-8500, option 2

24 Hour Concur User Support: 866-793-4040

## Approver Limitations

### YES

- ✓ Edit Line-Level Business Purpose
- ✓ Adjust Amount Approved Down
- ✓ Change, Delete, Add Coding
- ✓ Modify Expense Type\*
- ✓ Attach Additional Receipts/Images
- ✓ Flag Additional Pay Expense Reports

\* only certain expense types may be changed

### NO

- X Change City of Purchase
- X Select Different Payment Type
- X Modify Expense Type\*
- X Include Alcohol in a Business Meal
- X Update Transaction Date
- X Delete Attached Receipts

\* add itemizations (including alcohol)

## Edit Line-Level Business Purpose

A business purpose substantiates that the expenses align with the goals, objectives, and mission of the University. It also adequately describes the *expense* as necessary, reasonable and appropriate for the University. The approver has the ability to edit the 64-characters located within the business purpose field.

1. Click specific **Expense Line**
2. Update information in the **Business Purpose** field
3. Click **Save**

The screenshots show the 'Business Purpose' field in the Concur system. In the first, the field contains 'food/supplies for office'. In the second, it contains 'Harvard Kitchen Food/ABC/2 23 19'. Other fields like Expense Type (Food Supplies (6570)), Transaction Date (02/23/2019), City of Purchase (Boston, Massachusetts), Payment Type (Citibank - Mastercard), Amount (212.00), and Vendor Name (PEAPOD GROCERIES) are visible.

## Adjust Amount Approved Down

The approver has the option to decrease the amount submitted for the reimbursement by the traveler. The approver can adjust the submitted amount for a number of reasons (e.g. exceed policy, department budget restrictions, etc.). The approver can only reduce the approved amount; not increase it.

1. Click specific **Expense Line**
2. Enter reduced amount in the **Approved Amount** field
3. Click **Save**

The screenshot shows the 'Approved Amount' field in the Concur system. The 'Amount' field is 441.20 and the 'Approved Amount' field is 200.00. Other fields include Expense Type (Airfare), Class of Service (4. Economy), Destination (Domestic), Vendor (JetBlue Airways), Transaction Date (02/12/2019), Enter Vendor Name (JETBLUE 27921193802541), City of Purchase (Boston, Massachusetts), and Payment Type (Citibank - Mastercard).

## Change, Delete, Add Coding

A traveler can potentially use the incorrect coding on a report or the approver may want to correct based on the department's budgetary restrictions and/or additional knowledge. The approver has the option to change, delete, and/or add coding (if necessary).

1. Click specific **Expense Line**
2. Click **Allocate**
3. Edit, Delete or Add **TUB, ORG, FUND ACTIVITY, SUB-ACTIVITY**, and/or **ROOT** fields to reflect the appropriate coding needed
4. Click **Save**

Allocate By:	Add New Allocation	Delete Selected Allocations	Favorites	Add to Favorites			
<input checked="" type="checkbox"/>	Percentage	* TUB	* ORG	* FUND	* ACTIVITY	* SUB-ACTIVITY	* ROOT
<input checked="" type="checkbox"/>	100	(370) FCORF...	(30700) FCORF...	(000001) Unres...	(600100) FCO...	(0000) 600100*	(00000) Unspe...

## Modify Expense Type

A traveler can potentially use the incorrect expense type on a report or the approver may want correct it to more accurately describe the transaction. The approver has the option to change **only** the expense type (but not the additional fields associated to it such as Description, Other Type, etc.).

1. Click **Expense Type** drop down
2. **Select** new expense type
3. **Enter** required information (if possible). Certain fields cannot be edited by the approver. Please **Send Back** to traveler to edit.
4. Click **Save**

- 01. Travel Expenses
  - Allowance Meal
  - Group Lodging
  - Individual Meals & Incidentals
  - Lodging Deposit
  - Per Diem less than Federal
- 02. Transportation
  - Airfare
  - Airline Fees
  - Car Rental
  - Ground Transportation
  - Parking
  - Rail
- 03. Business Meals & Entertainment

Expense Type  
Individual Meals & Incidentals

Enter Vendor Name  
PEAPOD GROCERIES

Approved Amount  
212.00

## Attached Additional Receipts/Images

Additional support documentation maybe required as part of the audit trail for the expense report (e.g. medical exceptions, correspondence, etc.). The approver has the option to attach the paperwork to the header level of the report.

1. Click **Receipts** in an active report
2. Select **Attach Receipt Images** in the drop down
3. Click **Browse and Open** to select file to upload
4. Click **Upload and Close** to attach the file

Office Supplies

Summary Details Receipts Print / Email

Exceptions	Expense Type	Date
N/A		

Receipts Required  
View Receipts in new window  
View Receipts in current window  
Attach Receipt Images

Receipt Upload and Attach

You may attach scanned images.

You currently do not have any expenses requiring receipts. You may choose up to 10 files to attach to the report.

For best results, scan images in black & white with a resolution of 300 DPI or lower.

Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading: [Browse] [Upload]

Receipt Upload and Attach

You may attach scanned images.

You currently do not have any expenses requiring receipts. You may choose up to 10 files to attach to the report.

For best results, scan images in black & white with a resolution of 300 DPI or lower.

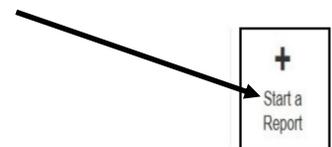
Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading: C:\fakepath\Capture 2.JPG [Browse] [Upload] [Remove]

## Flag Additional Pay Expense Reports

Corporate card (Citibank) reimbursements that include expenses to add to the reimbursee's income, such as late reimbursement requests (expenses between 91-182 days), must include an "Add Pay" action (available in Aurora).

1. Click **Start a Report** on the homepage
2. Click **Includes Additional Pay** box to activate additional pay process
3. **DO NOT SUBMIT** Concur report until additional pay action is approved in **AURORA** for corporate card transactions
4. **Attach** approved additional pay action document to header level of expense report before approving



Create a New Expense Report

Report Header

Report Name: [ ] Policy: HR Expense Policy Traveler Type: Staff Report Date: 03/16/2018 Business Purpose: [ ] Comment: [ ]

TUB	ORG	FUND	ACTIVITY	SUB-ACTIVITY	ROOT
1 (370) FCORFAS Care	2	3	4	5	6

Includes additional pay