Quick Reference Card – Approving Expense Reports

Getting Started
- Log in to my.pitt.edu
- Click the link for PantherExpress Travel and Expense Management
- You will be taken to the Concur home page

Accessing Expense Reports Pending Approval
From the Concur Homepage, click one of the following:
- Approvals link on the Quick Task Bar
- Required Approvals link next to the PantherExpress welcome message
- Required Approvals link found under My Tasks

Approval Options
1. **Approve a submitted Expense Report**
   a. Click the name of the report you want to open
   b. Review each line for compliance and to ensure required receipts and itemizations have been provided
      i. Click the icons associated with expenses to display attached receipt images, account allocations, comments, missing receipt affidavits, and exceptions
      ii. Click the > symbol to expand the expense entry to display itemization details
      iii. Click Details, Allocations to view account allocations for the entire report
   c. After reviewing all items, click Approve

2. **Send an Expense Report Back to the Employee**
   Approvers cannot modify expense reports. If the report requires correction, send it back to the Employee
   a. Click the name of the report you want to open
   b. Click Send Back to Employee
   c. Use the Comment field in the Send Back Report window to explain the reason the report is being returned to the employee, then click OK

3. **Approve and Forward an Expense Report for Additional Approval**
   You have the option to forward expense reports in your queue to additional approvers
   a. Click the name of the report you want to open
   b. Review the report, then click Approve & Forward
   c. In the User-Added Approver field, click the dropdown and select Last Name or Email Address for the search method.
   d. Search for, then select the appropriate individual
   e. Add a Comment
   f. Click Approve & Forward.

Cost Object Approver
- When entering an expense report, the Concur system allows you to charge to accounts outside of your primary department.
- If expenses are shared between a home department and an outside department, upon submission, the expense report will simultaneously forward to both the home department approver and the Cost Object Approver, i.e., the outside department’s designated approver.
- Each approver can take individual action on the expense report, but the report will not forward to Payment Processing for final review until it has been approved by both departments.
- If all expenses are being charged outside of one’s home department, the expense report does not forward to the primary department’s approver.

View Approved Reports
- You may go back to review any reports you have already approved.
- From the Expense tab, click Approve Reports
- On the left side of the screen change your View to filter for the reports you want to review

**Note:** The same procedures apply for locating, reviewing, and approving Travel Requests.
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Concur Buttons and Icons

- **Trip Data:** Indicates trip information from an itinerary.
- **Ground:** Indicates a Limo, Taxi, or Car ground transportation expense.
- **Credit Card Transaction:** Indicates that an expense entry was a credit card transaction.
- **Electronic Receipt:** Indicates Electronic receipt has been sent by a vendor to a users account.
- **Exception:** Indicates that an expense entry exception must be resolved before submission.
- **Full Allocation:** Indicates that the expense entry has been fully allocated.
- **Partial Allocation:** Indicates that the expense entry has only been partially allocated.
- **OCR Receipt:** Indicates that an expense entry has an Optical Character Recognition (OCR) receipt.
- **Paper Receipt Required:** Indicates that an expense requires a paper receipt.
- **Receipt Required:** Indicates that an expense requires a receipt.
- **Receipt Attached:** Indicates that the required receipts have been attached.
- **Receipt Affidavit:** Indicates a missing receipt affidavit has been attached to the expense.
- **XML Receipt Attached:** Indicates that an XML receipt is attached to the expense.
- **Pending Processor Review:** Indicates that the submitted expense report is pending review.
- **Personal Expense:** Indicates that an expense entry was marked as personal.
- **Report Ready for Submission:** Indicates that the expense report is ready for submission.

Questions

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