Quick Reference Card – Approving Expense Reports

PantherExpress
Travel & Expense Management

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

   (*Returned reports can be modified by the preparer or the traveler. A preparer will receive email notification when an expense report is returned, as long as "Receives Email" is selected when the preparer is designated as a delegate).*

3. **Approve and Forward an Expense Report for Additional Approval**
   Approvers have the option to forward expense reports in their 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**.

4. **Update the account allocations of Expense Report**
   Approvers can now update account allocations of expense reports submitted for their approval.
   a) Go to **Details, Allocations** and click the **Summary** button
   b) **Select the check box** next to Date to select all available lines
   c) Click the **Allocate Selected Expenses** button.
   d) **Update** the account allocations as necessary
   e) Once complete click Save.
   f) Acknowledge the confirmation message and click the Done button.

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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 **Approvals** tab, click **Reports.**
- Click the **View** dropdown, and select the time period for the reports you want to view.

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

Questions

Contact **PantherExpress Customer Service**:
Phone - 412-624-3578
Email – pantherexpresscs@cfo.pitt.edu
Web Inquiry – http://cfo.pitt.edu/pexpress/CustomerService/inquiry.php

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.