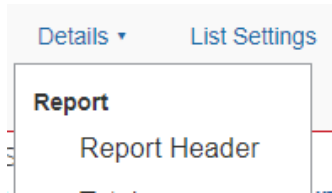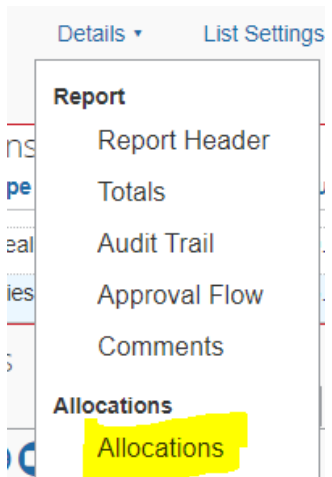# How to Review a Report in Concur

- You will receive an email from SAP Concur letting you know there is a report awaiting your approval
- Click the link in the email and log into Concur

- Review the Report Header by clicking Details → Report Header

  Details ▾   List Settings

  Report

     Report Header

- Verify the report dates are the first of the month through the last of the month

Report/Trip Start Date	Report/Trip End Date
09/01/2021	09/30/2021

- Under Details, review the Allocations to see the Fund and Department that charges are coded to

  Details ▾   List Settings

  Report

     Report Header

     Totals

     Audit Trail

     Approval Flow

     Comments

  Allocations

     Allocations

- A window like this will pop up

- If expenses are coded to multiple accounts, they will be shown in the window above.

  Close the window.

Now select the first expense on the report.

- Review the detailed expense information, including amount of charge, date, and expense type selected.
- Object codes are determined by the chosen expense type
- Any expense types that include a 5 digit object code are considered non-travel expenses by Concur
- Any expense types without the object code are considered travel expenses and will be put into the appropriate travel object code (55151, 55175, 55152, 55180, 55190, etc...) based on the report purpose, travel type (domestic or foreign), and traveler type (faculty, staff, student, team).

- Next review the receipt by hovering over the circular button with an image of a piece of paper and check mark on it

How to Review a Report in Concur

- The receipt image will pop up on the screen. Make sure it includes the following:

  - Name & Address of Payee
  - Transaction date
  - Dollar amount that matches the charge in Concur
  - Description of the purchase

- Receipts for group meals must also include
  - Business purpose of the expense
  - A list of the attendees at the meal, either in the comments box or on the receipt.

- Technology expenses should have an approval email from IT included with the receipt, usually on page 2

- Gas purchases are only allowed for rental cars, not personal vehicles.

- Missing receipt affidavit should be attached as the 'receipt' for any expenses where the receipt has been lost or was not given to the cardholder.

- Once you have reviewed all expenses on the report, click Approve.