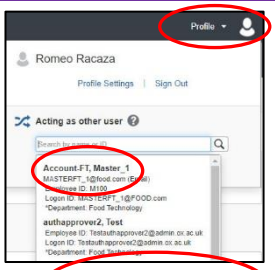
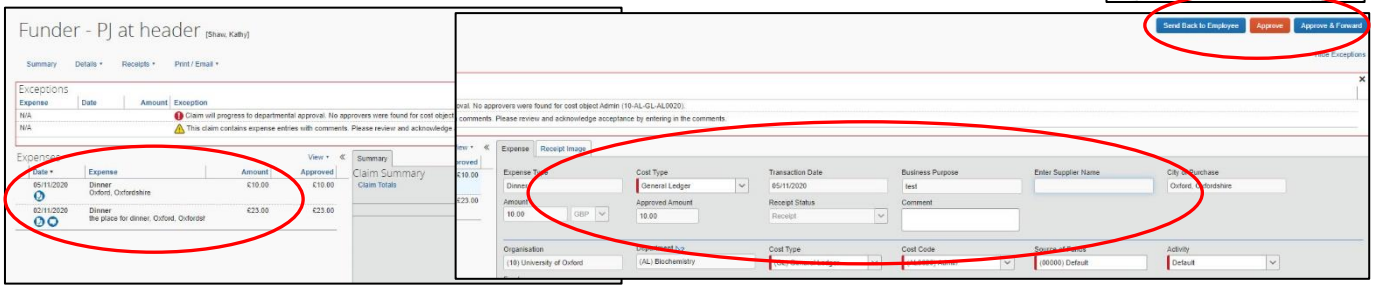
SAP® Concur® **eExpenses**
Approver Quick Reference Guide

Approving claims via web browser



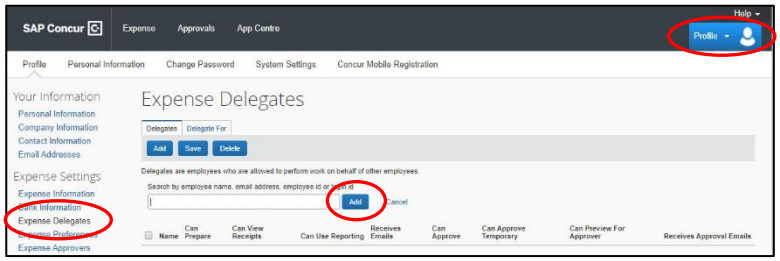
1. For approvers at the 1 pence, £1,000 or £10,000 budgetary level, a Master Account is set up for your department and you are delegated the authority to approve claims accordingly. Click on **Profile** and search for the appropriate **Master Account** in order to access the claims that require your attention. Budget-holder **delegates** also need to access claims for review by locating within **Profile** the person for whom they are delegating. Budget-holders can access claims from the homepage without this step.
2. Click on the **claim** to view its details, and then review each expense **line** within it.



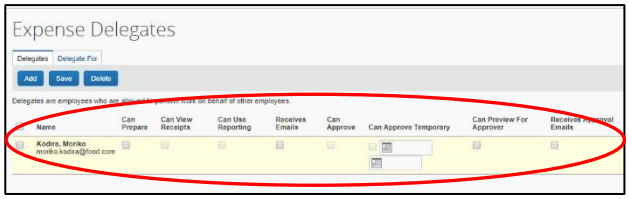
3. You can then **Approve** the claim or **Send back to Employee** for further explanation or information. Approvers, but not budget-holders, can also **Approve and Forward** to the claim to someone else.

Delegation

As a budget-holder you can select someone else to carry out your approval role to cover for absences or annual leave.

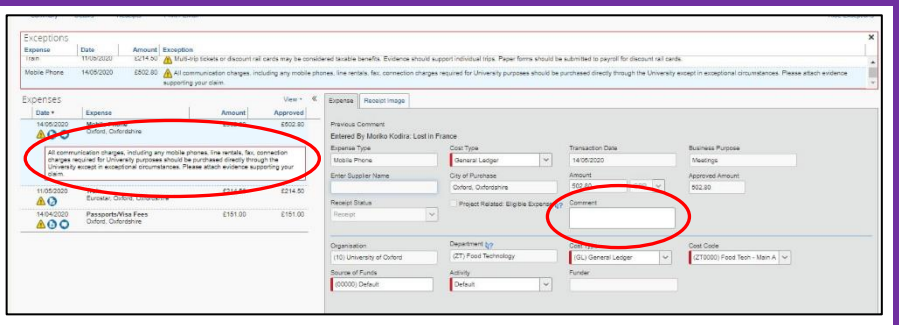


1. Under your Profile, click **Expense Delegates** and **Add**.
2. Start typing the **delegate's name** and the list will be populated, select the appropriate name and tick the actions you want to delegate to them.



NOTE: delegates have to be set up using the web browser, not the mobile app. Delegates also have to review and approve claims using the web browser.

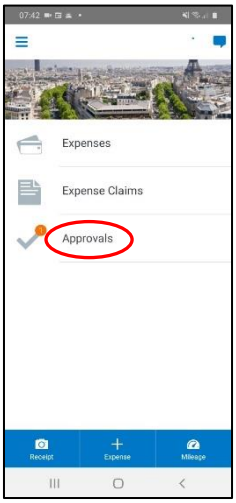
Managing exceptions and error messages in web browser



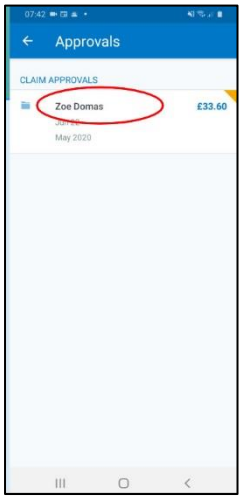
- **Warning messages**, or **Exceptions**, are displayed within eExpenses to highlight elements that need consideration as you review an expense claim.
- It is easiest to view these within the expense line they refer to, particularly when you have multiple lines for a claim.
- Use the **Comments** box to address exceptions and highlight errors.

Approving claims via mobile app

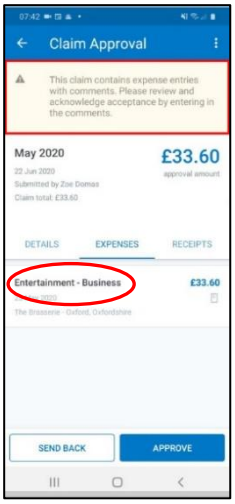
- Only budget-holders have the option to approve claims via the mobile app. All delegated approvers must perform approval tasks through the web browser - this includes anyone set as a delegate by a budget-holder and all approvers at the 1 pence, £1,000 and £10,000 levels.
- There might be some differences in how you input information, how details are displayed on screen and the terminology used depending on what sort of mobile device you are using.



1. Tap on **Approvals**.

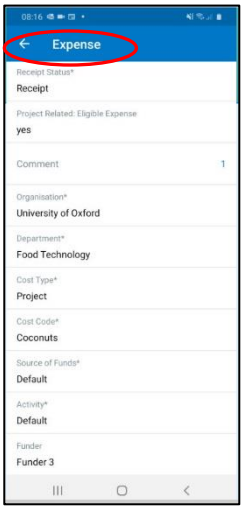


2. Tap on **expense claim**.



3. Note any **alerts** or **warnings** and tap **expense line** title.

4. Tap to check **alerts** or **warnings**, double tap **receipt** to enlarge it. Swipe up or scroll down to check more detail. Tap to see **Comments**.



5. **Return** to expense claim to **Approve** or **Send Back** to claimant.

Top tips

- You will receive **email notifications** (from autonofication@concursolutions.com) when submitted claims need reviewing. If you have taken no action after 10 days you will receive a reminder from mailreminderservice@concursolutions.com. Notifications can be switched off, but you should then regularly log in to eExpenses to check whether any submitted expense claims need your attention.
- All **Master Account** delegates at each approval level will be notified when an expense claim needs attention. Once one delegate has actioned that claim, the other delegates will not be able to amend it, but they can still see it. You can manage notifications so that only one person is notified.
- It is recommended that **inaccurately coded claims** are returned to claimants in order to educate them to complete the claim correctly in future.
- If any element of a claim needs further explanation or information from the claimant, the entire claim has to be sent back to the claimant by clicking on **Send back to Employee**.

Getting help

Access eExpenses

Expenses policy

Training and support

Claimant QRG

SAP Concur 24/7 support:

0800 389 8758