Partial Report Approval Process

Partial Report Approval - Concur offers a feature which allows approvers to select specific lines of an expense report for approval. Should lines on your expense report not be approved, you will be advised through an email notification containing the approver's comments. The lines not approved will be returned to you within an addendum expense report in an unsubmitted status. This report's name will reference the name of the original expense report. You should take timely action to correct the issues noted and submit the addendum expense report for approval.

Send one or more expenses back to the employee

Your company may allow you to return selected expenses on a report - without returning the entire report. If so:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click the desired report. The report appears.
2. Click the expense. The expense details appear on the **Expense** tab.
3. Select the **Send Back Expense?** check box.
4. Click **Approve**. The **Send Back to Employee / Expenses to Send Back** window appears.
5. Enter a comment.
6. Click **OK**.

Then, Expense automatically:

- **New report:**
    - Creates a new report named "Addendum to: <report name>" using the report header information from the original report along with any report-level exceptions
    - Attaches the selected expenses along with any entry-level exceptions
    - Adds an audit trail item, which includes the original report name and report ID
    - Returns the newly generated report to the employee along with the approver-entered comment
      NOTE: The newly created report is treated like a regular new report from that point forward. The user may not elect to submit it and can delete the report entirely. If it is submitted it is handled like a completely separate report from the original transaction.
- **Original report:**
    - Approves the remaining expenses on the original report
    - Adds an audit trail item, which includes the newly generated report name and report ID
    - Moves the original report to the next workflow step

Both reports appear on the user's **Report List** page. The user can now open the newly generated report, make the requested changes, and submit the report.

Eligible entries

Not all entries can be split from the original expense report and sent back to an employee. Several of the Expense features are incredibly complex and are only effective if all related expenses appear on the same expense report. Certain required calculations and some of the compliance processing require that the entire report remains intact. For that reason, an expense report that is associated with a cash advance or authorization request, for example, cannot be split up.

In addition, the interdependent nature of itemized expenses requires that itemizations (the "child" entries of an itemized expense) cannot be sent back individually; the entire itemized expense (the "parent") must be sent back to the employee. In these cases, the **Send Back Expense?** check box does not appear for the approver.