## **Columbia University Finance Training** Job Aid: Adding an Ad-Hoc Approver into the Concur Approval Workflow

Ad Hoc Approvers are manually inserted into workflow by Approvers for specific Expense Reports and Requests where additional review is necessary. This job aid details how Concur Approvers can insert Ad-Hoc Approvers into the approval workflow for Expense Reports.

## Adding an Ad-Hoc Approver into the Concur Approval Workflow

1. When reviewing an Expense Report, click the **Details** dropdown and select **Approval Flow**.

Approvals Home Requests Reports								
Business lunch [Zaretsky, Eric]								
Summary	Details • Receipts •	Print / Email +						
Exceptions Expense Type	Report Report Header	Int Exception						
Individual Meal	Totals	.00 A This itemized entry has sub-entries with one or more exceptions.						
Individual Meal	Audit Trail	.00 A Warning: This meal exceeds the threshold for Lunch. Please review the justification.						
L	Approval Flow	······································						
Expenses	Comments	View •						
Date •	Allocations	Amount Approved Report Summary   ch \$37.00 \$37.00 Report Totals						
	Allocations							

The Approval Flow window appears.

pproval Flow for Report: ml4262 UAT Business Exp Report		×
→ Supervisor Approval:		
Test, Default Approver		
Financial Approver:		
	⊕ ×	
Approval for Processing:		
	Add a step	before this
Approve Send Back		
	Save Workflow Car	ncel

2. Expand your Departmental approval level which displays your name. Click the desired blue **Plus** • icon. The one on left is to insert the approver after the next step and the one on the right is to add before the next step. If you are a Financial Approver, you may want to add before the next step, otherwise you could be inserting after the Accounts Payable review.

User-Added Approver:			
shee	Ð	×	
Sheeran, Katherine (ks2070@columbia.edu) User ID: 10021076 Logon ID: ks2070@columbia.edu			
Search Approvers By	~	0	

- 3. Search and select the name of the ad-hoc approver you want to add in the **User-Added Approver** field. The name must already be setup in Concur with an Approval role in order for it to appear as the search result.
- 4. Click Save Workflow.

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

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## **Getting Help**

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>