

This training guide covers how DAFs can use ARC to manage Concur settings for their School/Departments. You can select Concur Financial Approvers, opt-in Concur Supervisors, change the default Concur access for employees and student employees, select Concur Reporting Managers, and determine if your School/Division employees require pre-trip approval in order to be reimbursed for travel expenses.

Selecting Departmental Default Financial Approvers

You can choose the Concur Financial Approvers for the Departments within your School/Division. The Financial Approvers you select for each dollar level must already be designated with the Concur Financial Approver role, which is granted via an FSSA in Service Now.

- In **ARC**, navigate to the **NavBar** > **Columbia Specific** > **Concur** > **Setup** > **Financial Approver Default**.

- Enter the value for **School/Division (level 4)** and **Department**. You can click the **Look Up**  icons to search by Description.

Department	Description
1402102	FIN EVP of Finance
1403102	FHR Human Resources
1404102	FIN Finance Service Center

- Click the **Search** button to view the Financial Approvers available for that particular School/Division and Department.

School/Division (Level 4)	Department	Level 1: \$0 - \$500	Level 2: \$500 - \$2,500	Level 3: \$2,500 - \$15,000	Level 4: \$15,000 - \$50,000
140000X	1402102	ar2208	ar2208	ar2208	ar2208
140000X	1403102	ks2070	ks2070	ks2070	ks2070
140000X	1404102	pr2201	pr2201	tn2311	tn2311
140000X	1404202	pr2201	pr2201	tn2311	tn2311

- Click the matching **Department**. The Financial Approver Defaults for the Department appear.

Financial Approver Defaults

School/Division **140000X** 140000X - FIN Finance
Department **1404202** 1404202 - FIN Finance Info Systems

Approver Levels

Level 1: \$0 - \$500:	<input type="text" value="pr2201"/>	Reedy, Paul	Active
Level 2: \$500 - \$2,500:	<input type="text" value="pr2201"/>	Reedy, Paul	Active
Level 3: \$2,500 - \$15,000:	<input type="text" value="tn2311"/>	Teresa Nunes	Active
Level 4: \$15,000 - \$50,000:	<input type="text" value="tn2311"/>	Teresa Nunes	Active

Please note: Approvers can be assigned at more than one Level, but they must be in sequential order.

Save **Return to Search** **Notify** **Add** **Update/Display**

5. Enter the **UNI** of the **Financial Approvers** responsible for approving each dollar **Level**. Only those that have been granted a Concur Financial Approval role within the Department can be assigned. You can assign an Approver to more than one Level, but they must be in sequential order (as pictured above).
6. Click **Save**.

Opting in Concur Supervisors

You can select employees who are designated as Supervisors in PAC within your School/Division to be opted-in as Concur Supervisors so they can perform initial reviews and approvals on Requests and Reports for their direct reports. Those that are opted-in will be assigned the Managing Travel and Expense Approvals Training which they have to successfully complete in order to be a Supervisor in Concur.

1. In **ARC**, navigate to **NavBar > Columbia Specific > Concur > Setup > Concur Supervisor Opt-In**.

Supervisor Opt-In

Concur Supervisor Opt-In Parameters

School Department OR User ID

Division

Sub Division

CU Admin Department

Search **Clear**

2. In the Parameters section, you can search for all Supervisors from a **School Department**, **Division**, **Sub Division**, and **CU Admin Department** or you can search for a specific Supervisor by **UNI**. You can click the **Look Up** icon to search by Description in each field.

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- Click **Search**. Your search result(s) appear. The employee(s) must have a direct report indicated in PAC to appear in the results. The Opt-In column displays whether the Supervisor is already opted in as Concur Supervisor or not.

The screenshot shows the 'Supervisor Opt-In' page in the ARC system. The 'Parameters' section includes search fields for School Department, Division, Sub Division, and CU Admin Department, along with a 'User ID' field containing 'tp194'. The 'Update Values' section shows the 'Supervisor Opt-In' dropdown set to 'Yes'. The 'Search Results' table below shows one result for Wm Gillespie with an 'Opt In' status of 'No'.

Select	Division	Division Descr	Sub-Division	Sub-Division Descr	Admin Dept	Admin Dept Descr	Supervisor UNI	Supervisor Name	Opt In
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140400X	1404202	Finance Information Systems	tp194	Wm Gillespie	No

- Click the **Checkbox(es)** from the **Select** column to select the desired Supervisor(s) to update their Opt-In status.

This screenshot is identical to the previous one, but the checkbox in the 'Select' column of the search results table is now checked, indicating that the supervisor has been selected for update.

Select	Division	Division Descr	Sub-Division	Sub-Division Descr	Admin Dept	Admin Dept Descr	Supervisor UNI	Supervisor Name	Opt In
<input checked="" type="checkbox"/>	140000X	FIN Finance	14AD00X	140400X	1404202	Finance Information Systems	tp194	Wm Gillespie	No

- Click the **Supervisor Opt-In** dropdown and select **Yes** (opt-in) or **No** (opt-out) to change the Opt-In status.
- Click **Save**. The Opt-In column displays the updated status.

Setting Employee and Student Employee Access Defaults

You can change the default Concur access for employees and student employees within your School/Department. You can either add or remove access to the Travel or Expense modules within Concur depending on the employee type or the individual circumstances of each employee. Note that you cannot grant Travel access without also granting Expense access.

Note: By default, students do not have Concur access. You can request that a student be granted Concur access by submitting a request via ServiceNow. Once access is granted, the student will be available for you to setup the Access Defaults.

1. In **ARC**, navigate to the **NavBar > Columbia Specific > Concur > Setup > Employee Access Defaults**.

Employee Opt-in Search

Employee Access Default Selection

Parameters

School Department OR UNI

Population Type

Job Code

Opted In

2. In the Parameters section, you can search for all employees from a **School Department** with a specified **Population Type** (Officers of Administration, Officers of Instruction, etc.) or you can search for a specific employee by **UNI**. You can click the **Look Up** icons to search by Description.
3. Click **Search**. Your search result(s) appear.

Update Values

Update Travel Access To:

Update Expense Access To:

Update Expiration Date To:

Search Results

Select	Population Type	Job Code	Description	Empl ID	User ID	Last Name	First Name	Travel Access Flag	Expense Access Flag	Concur Status	Access Override	Expiration Date
<input checked="" type="checkbox"/>	Officers of Administration	314117	Director - TECH	10027837	tp194	Gillespie	Wm	Yes	Yes	Active	No	

4. Click the **Checkbox(es)** from the **Select** column to select the desired employee(s).
5. In the **Update Values** section, select the **Yes** or **No** in the **Update Travel Access to** and **Update Expense Access to** dropdowns. You must make selections in both fields.

Update Values

Update Travel Access To:

Update Expense Access To:

Update Expiration Date To:

Optionally, you can enter a date in the **Update Expiration Date To** field so that the access you are granting will automatically expire on the given date.

6. Click the **Update Selected Rows** button. The **Access Override** column will indicate **Yes** for the selected employees.

Assigning Concur Reporting Managers

You can assign Reporting Managers at the Sub-Division (level 6) within your School/Department to get access to the Concur Reporting module. The employee must already be assigned the Reporting Manager role, which is granted via an FSSA in Service Now.

1. In **ARC**, navigate to the **NavBar > Columbia Specific > Concur > Setup > Concur Reporting Manager Setup**.

Concur Reporting Manager

Reporting Manager

School Department

Division

Sub-Division

2. You can search by the UNI for a specific **Reporting Manager** or you can search for all Reporting Managers within a **School Department**, **Division**, and **Sub-Division** (level 6). You can click the **Look Up** icons to search by Description.
3. Click **Search**. The results show the assigned Reporting Manager for each Sub-Division (level 6).

Concur Reporting Manager

Reporting Manager

School Department

Division

Sub-Division

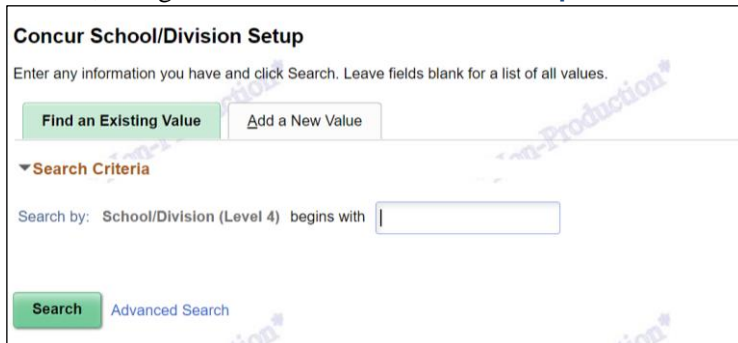
	Division	Division Descr	Sub-Division	Sub-Division Descr	Reporting Manager UNI	Reporting Manager Name
1	10SE00X	CAD Office of the SEVP	100200X	CAD Office of the SEVP	tn2311	Teresa Nunes
2	14AD00X	FIN Administration	140200X	FIN EVP of Finance	tn2311	Teresa Nunes
3	14AD00X	FIN Administration	160200X	FIN Finance Business Services	tn2311	Teresa Nunes
4	14AD00X	FIN Administration	164000X	RFS Registrar	tn2311	Teresa Nunes

4. Enter the desired **Reporting Manager UNI** for the Sub-Division(s) you want to update. The employee must have the Concur Reporting Manager role in order to be assigned.
5. Click **Save**.

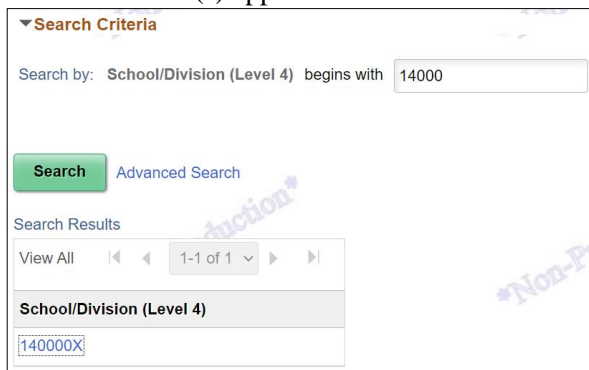
Requiring Pre-Trip Requests for Your School/Division

You can designate that all employees within your School/Division must get Pre-Trip Approval in Concur before they can be reimbursed for Travel Expenses.

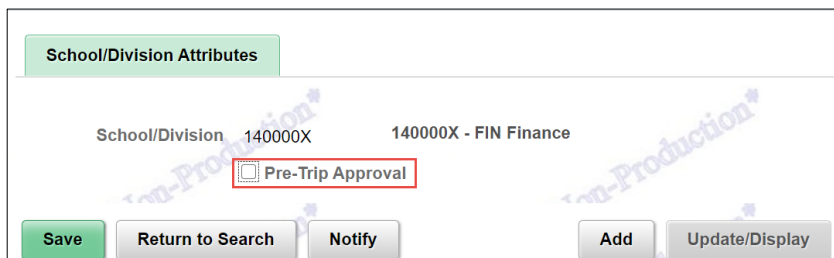
1. In **ARC**, navigate to the **NavBar** > **Columbia Specific** > **Concur** > **Setup** > **Concur School/Division Setup**.



2. Enter the **School/Division (Level 4)** number to Search for your School/Division and click **Search**. The matching School/Division(s) appear.



3. Click the matching **School/Division (level 4)** number. The School/Division Attributes page appears. If the search result is an exact match, the page automatically appears.



4. Select the checkbox for **Pre-Trip Approval** to require all employees in your School/Division to get Pre-Trip Approval in Concur in order to be reimbursed for Travel Expenses.
5. Click **Save**.

Role Access or Removal via Service Now

The **Initial Reviewer** and **Travel Arranger** roles are granted and assigned by submitting an FSSA in Service Now.

Removing Any Concur Role from Employees

- Submit a Service Now incident: select CUIT for the type of incident you want to create, and indicate in the description field that the incident be routed to the ARC Security team
- Provide a description of the request in the incident: removal of Concur role(s).
- Attach a spreadsheet with the following information: UNI, Name, Role Name and Route Control where required.

Removing All Concur Roles for an Employee

- Submit a Service Now incident: select CUIT for the type of incident you want to create, and indicate in the description field that the incident be routed to the ARC Security team.
- Provide UNI, Name and specify to remove all Concur roles from the employee's profile.

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

<https://columbia.service-now.com>