

This Job Aid illustrates the Concur Approval Workflow for Expense Reports, Travel/Cash Advance Requests, and Pre-Trip Requests.

Travel and Business Expense Report Approval Workflow



- Expense Reports for profiled Payees (employees and students who have a Concur profile) will route to a Supervisor (if available) or Initial Reviewer, regardless of the Expense Report dollar amount, the Payee (faculty, staff, student), or where expenses are being charged, followed by the Financial Approver.
- Expense Reports for non-profiled payees (employees, students or guests who do not have a Concur profile) will route to an Initial Reviewer (not Supervisor) if the **expenses are being charged to a Sponsored Project** (when PC Business Unit is SPONS). If expenses are not being charged to a Sponsored Project, workflow will skip the Initial Reviewer and route directly to the Financial Approver.
- Senior Business Officer and Special Audit routing steps will only be inserted by the system for specific policy exceptions. Special Audit represents approval from central offices. Refer to the [Concur Expense Policy Exception Approval Workflow Requirements](#) job aid for additional detail.
- Accounts Payable represents the Audit & Review staff which is the final approval stage.

Ad Hoc Approvers - Inserted manually into workflow by Approvers where additional review is necessary.

- * Approvers have the ability to assign Approver Delegates in their Concur profile who can approve on their behalf (only individuals who already have an Approval role in Concur can be assigned as Approver Delegates). Preview Delegates can be assigned by approvers with the ability to review / validate (with no approval authority)

Note: Expense Reports for Senior Leaders (e.g. Senior Business Officers and select Executives) route to specific Executive Expense Approvers for final approval. A workflow step will be inserted after the SBO / Special Audit approver step. Executive Expense Approvers are assigned to individuals; routing is not based on dollar amount and ChartField distribution.

Travel / Cash Advance Request Approval Workflow



- Travel / Cash Advances start in Concur Request using the same functionality as pre-trip request
- Workflow for Travel / Cash Advance Requests will mirror the Expense Report workflow as illustrated above
- Expense Reports with approved Requests, including those with Travel /Cash Advances, will allow the report to skip the Supervisor / Initial Reviewer approval step and route to the Financial Approver

 **Ad Hoc Approvers** - Inserted manually into workflow by Approvers where additional review is necessary.

- * Approvers have the ability to assign Approver Delegates in their Concur profile who can approve on their behalf (only individuals who already have an Approval role in Concur can be assigned as Approver Delegates). Preview Delegates can be assigned by approvers with the ability to review / validate (with no approval authority).

Note: Requests for Senior Leaders (e.g. Senior Business Officers and select Executives) route to specific Executive Expense Approvers for final approval. A workflow step will be inserted after the SBO / Special Audit approver step. Executive Expense Approvers are assigned to individuals; routing is not based on dollar amount and ChartField distribution.

Pre-Trip Request Approval Workflow

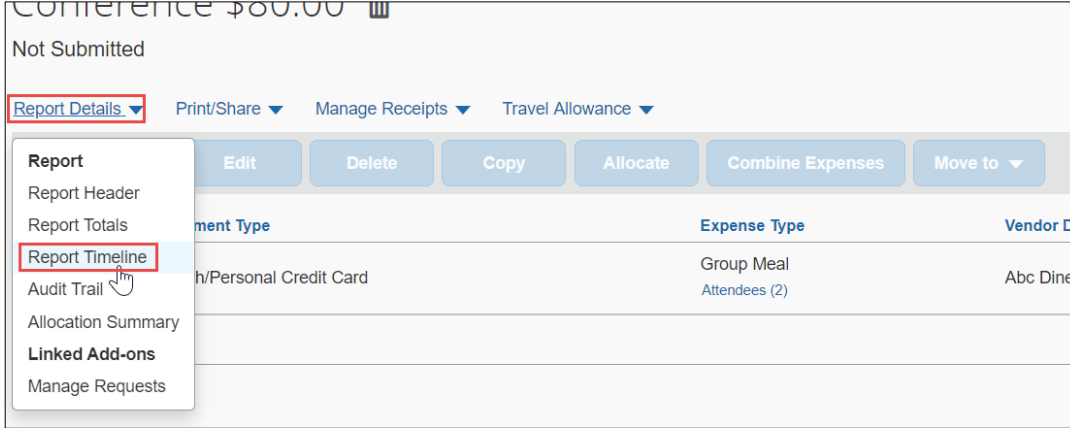


- Anyone that is required to obtain pre-trip approval (Request within Concur) will not be able to submit an Expense Report without pre-trip approval attached
 - The Pre-Trip Requester completes a Request in Concur with an estimated travel budget by Air / Rail, Hotel, Car, Meals, etc.
 - If the Requester does not have a Supervisor within Concur, the Requester must select an Initial Reviewer assigned to the administrative department
 - The Supervisor / Initial Reviewer will be responsible for validating the purpose and budget of the trip request
 - The Initial Reviewer may need to contact Faculty or other Administrators for additional information about the trip
 - Expense Reports with pre-trip approval will skip the Supervisor / Initial Reviewer approval step and route directly to the Financial Approver
- * Approvers have the ability to assign Approver Delegates in their Concur profile who can approve on their behalf. Preview Delegates can be assigned by approvers with the ability to review / validate (with no approval authority).

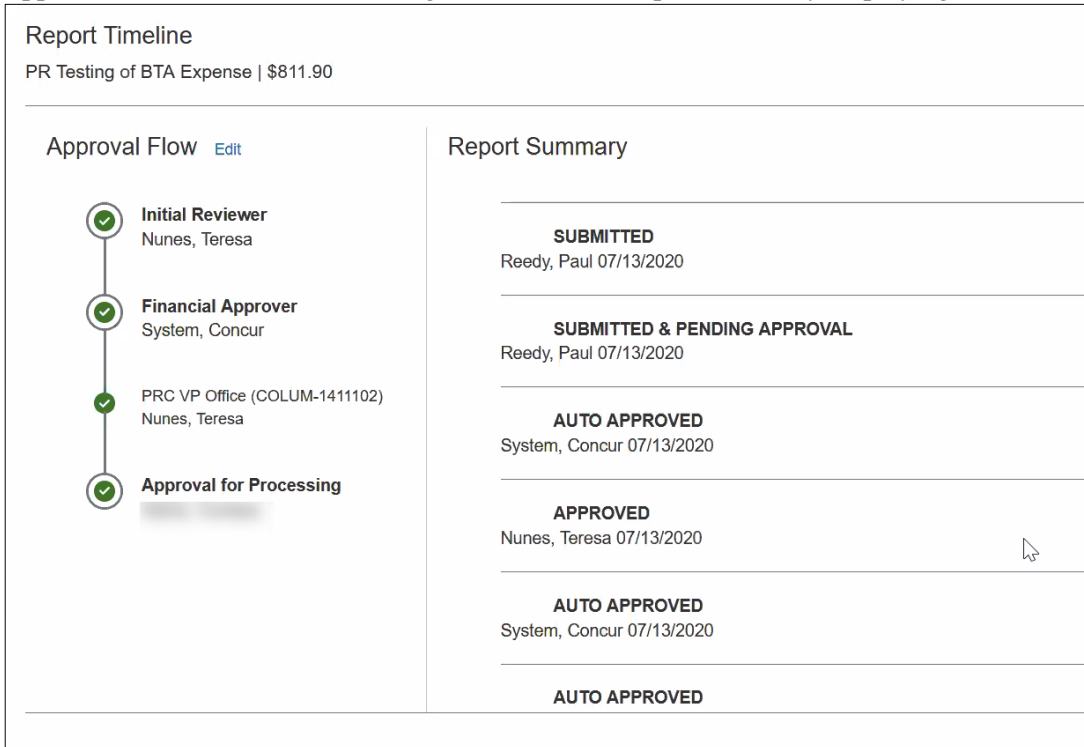
Viewing Your Approvers and Approval Status in the Report Timeline

After you create and save your Expense Report, you are able to view the Report Timeline to see the name of your Supervisor/Initial Reviewer. After you submit your Expense Report, you can also view the Report Timeline to check the approval status of the report.

1. Open the Expense Report in Concur.



2. Click the **Report Details** dropdown and select **Report Timeline**. The Report Timeline window displays the Approval Flow with status, including names and the Report Summary displaying workflow activities.



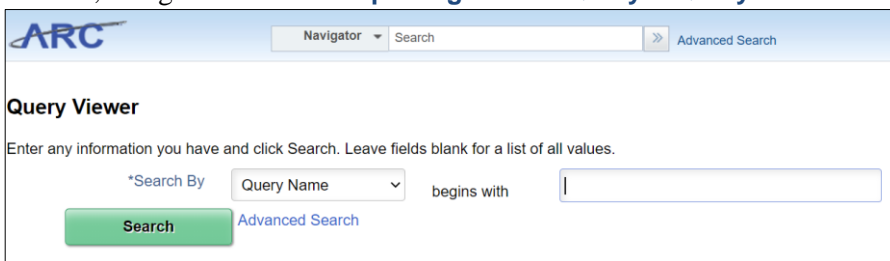
Using an ARC Query to View Concur Approval Roles by Department

ARC users can run a CU_SEC_CNR_RTE_CNTRL_BY_DEPT query to determine which individuals have the Reporting Manager, Initial Reviewer, Financial Approver or SBO role in ARC. The query results display the following:

- Anyone at the University who has been assigned an approver role and what their training status is. The Training Status column reflects either a “C” for Complete, or an “R” for Required (meaning the individual has not yet completed their Concur Approver Training).
Note: No training is required for the Reporting Manager role, so the Training Status field does not apply to this role.
- A separate line for each role that an individual has been assigned and for which Department Tree level: Level 5 Division node (SBO), Level 6 Sub-Division (Reporting Manager) or Level 8 Department node (Initial Reviewer and Financial Approver). One individual may have multiple lines with a separate line for each role.

Note: Supervisors are not included because Supervisors are associated with an individual, not a specific department.

1. In ARC, navigate to **Main > Reporting Tools > Query > Query Viewer**.

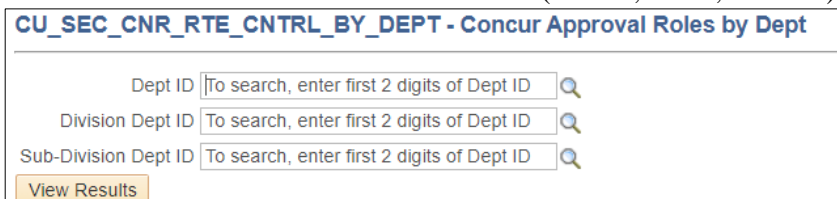


2. Enter CU_SEC_CNR_RTE_CNTRL_BY_DEPT in the **begins with** field and click **Search**. The Query search result appears.



Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
CU_SEC_CNR_RTE_CNTRL_BY_DEPT	Concur Approval Roles by Dept	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

3. Select the link for the desired **Run to** method (HTML, Excel, or XML). The Enter Values screen appear.



4. Enter **Dept ID**, **Division Dept ID**, and **Sub-Division Dept ID**. You can search using the first two digits of the Dept ID to narrow by Department.
Note: There is no validation between the Dept, Division and Sub-Division search fields. If you enter a Dept ID for a different Department then the query results for that level will display on the report.
5. Click **View Results**.

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>