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.

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

![Concur Financial Approver](image)

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

![Look Up Department](image)

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

![Search Results](image)

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

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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**.

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.
3. 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.

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

5. Click the **Supervisor Opt-In** dropdown and select **Yes** (opt-in) or **No** (opt-out) to change the Opt-In status.

6. 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.**

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.

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.

   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**.

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**图标 icons to search by Description.

3. Click **Search**. The results show the assigned Reporting Manager for each Sub-Division (level 6).

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