GUIDE: Setting the Approval Flow for your Concur Expense Report

WHERE TO GET HELP?

Concur Online Training Material
https://emplearn.yorku.ca/ConcurExpense

Register for in-lab training
Click here to register for an upcoming training session

Concur User Support Desk – for navigational & application assistance
By Phone (available in English 24/7/365 from Canada/US): Call 1-866-793-4040

Local resource within your faculty / department
Click here for a list of local resources and their contact information

York Expense Desk – for policy and functional assistance
Charlene Lin    Email: linchun@yorku.ca    416-736-2100 X 44684
REVIEWER & APPROVER ROLES IN CONCUR

INTRODUCTION

Concur Expense is York University’s new automated expense reporting system. Concur Expense allows expense reports to be submitted and approved electronically, making the expense reimbursement process faster and more efficient.

In order for your expense reports to be routed electronically for approval to the appropriate individuals, you must set up your “Expense Approvers” within the Concur Expense “Profile”.

This document provides a brief description of the roles in the approval process and instructions on how to set up and change your approvers within your Concur Expense Profile.

Definitions:

<table>
<thead>
<tr>
<th>York Role</th>
<th>Concur terminology</th>
<th>Who At York</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-over-one Approver</td>
<td>Default approver</td>
<td>Your one-over-one approver is the individual to whom you report at York University and the individual who normally approves your expense reports. Expense reports are typically approved by a Chair, Associate Dean, or Dean.</td>
</tr>
<tr>
<td>Departmental or Faculty Reviewer</td>
<td>Default approver 2</td>
<td>Your departmental or faculty reviewer may be an individual in your faculty/department/unit that reviews your expense reports for accuracy and policy compliance. For research claims, this may be your faculty research administrator or an administrative support person within your department. For operating/non research related claims, the faculty/departmental reviewer may be an administrative support person within your department or a staff member in the Office of the Executive Officer or the Dean’s Office.</td>
</tr>
<tr>
<td>Cash Advance Approver</td>
<td>Cash Advance Approver</td>
<td>Individual to whom the claimant reports or their Executive Officer.</td>
</tr>
<tr>
<td>Cost centre manager/signing authority or other approver</td>
<td>User added approver</td>
<td>In cases where other approvals are required, these may be added by the claimant. For example, additional approval may be required in cases where the approval of a cost centre manager is required.</td>
</tr>
</tbody>
</table>

For ADDITIONAL ASSISTANCE please refer to Point 27, below.
SETTING YOUR REVIEWER, APPROVER, AND CASH ADVANCE APPROVER IN YOUR CONCUR PROFILE

Claimants may set their faculty/departmental reviewer, one-over-one approver and cash advance approver in their profile so that each expense report follows the same approval flow (i.e. the default approval flow). By setting the default approval flow, you do not need to set the approval flow for each report. The following instructions (#1 to 15) take you through the process of setting up your default approval flow in your profile.

On occasion, the approval flow of a specific expense report needs to be modified. You can make changes to the default approval flow “on the fly” within the specific expense report. Instructions on how to make changes on the fly are also provided (see instructions #16 to 24)

NAVIGATING TO YOUR CONCUR PROFILE

1. Log into Concur at https://conlogin.apps06.yorku.ca/

2. Click the Profile menu on the right of your screen.

3. From the Profile menu, select Profile Settings.
4. From the Profile Settings page, select **Expense Approvers** under Expense Settings in the profile sidebar on the left side of your screen.

5. You will be directed to the Expense Approvers page of the profile.
6. Click in the field marked “Default approver for your expense reports”.

For clarification as to who should be entered as the “one-over-one approver” (or the “Default approver for your expense reports”), refer to the role definitions at the beginning of this document. If you need further assistance, please contact the Finance Officer or Executive Officer in your faculty/department/unit.

7. In the field marked “Default approver for your expense reports”, search for your “one-over-one approver” by entering their last name or email address. As you start typing, Concur will provide a list of employees that match the information you enter in the search field.
8. Select the appropriate individual.

![Image of Concur software interface showing Expense Approvers page]

The individual selected for the Default Approver will now electronically receive your expense report for Approval.

**SETTING YOUR “FACULTY/DEPARTMENTAL REVIEWER” IN YOUR PROFILE**

9. Click in the field marked “Default approver 2 for your expense reports”.

Please note that not all faculty and staff have a faculty/departmental reviewer (or a “Default approver 2 for your expense reports”). **For clarification as to who should be entered as the faculty/departmental reviewer, refer to the role definitions at the beginning of this document. If you need further assistance, please contact the Finance Officer or Executive Officer in your faculty/department/unit.**

If you do not have a faculty/departmental reviewer, you may leave this field blank and skip to step #12.

![Image of Concur software interface showing Expense Approvers page with a blank field]
10. Search for your “faculty/departmental reviewer” by entering their last name or email address. As you start typing, Concur will provide a list of employees that match the information entered in the search field.

11. Select the appropriate individual.
SETTING YOUR “CASH ADVANCE APPROVER” IN YOUR PROFILE

12. Click in the field marked "Default approver for your cash advance requests".

For clarification as to who should be entered as the “cash advance approver” (or the “Default approver for your cash advance requests”), refer to the role definitions at the beginning of this document. If you need further assistance, please contact the Finance Officer or Executive Officer in your faculty/department/unit.

13. Search for your "cash advance approver" by entering their last name or email address. As you start typing, Concur will provide a list of employees that match the information entered in the search field.
14. Select the appropriate individual.

15. After you have entered your one-over-one approver, faculty/department reviewer (if applicable), and your cash advance approver, click Save.

16. Your expense approvers are now saved in your profile.

   IMPORTANT: Your must update your profile if there is any change to your one-over-one approver, faculty/department reviewer (if applicable), or your cash advance approver.
MODIFYING THE APPROVAL FLOW FOR A SPECIFIC EXPENSE REPORT

Your expense reports may not always follow the same approval flow. Some reasons why your expense report may require different approval flow are:

- You are claiming against an operating fund, however the approvers you set in your profile is intended for your claims against research / PER funds
- You are claiming against a cost centre over which neither you or your one-over-one approver have signing authority

17. From within your expense report, click “Details” below the expense report name.
18. Select “Approval Flow” from the drop down menu.

19. The approval flow screen will appear. Note that the approvers that you entered in your Concur Expense Profile will flow through to your approval flow.
CHANGING YOUR DEFAULT APPROVERS FOR A SPECIFIC EXPENSE REPORT

20. To change the One-over-one approver click in the field below “Manager/Cost Centre Approval”.

To change the Faculty/departmental reviewer click in the field below “Faculty/Department Review”.

Search for an alternate individual by entering their last name. As you start typing, Concur will provide a list of employees that match the information entered in the search field.

Select the appropriate individual.
21. Review the revised workflow and click “Save Workflow”.
**ADDING AN ADDITIONAL APPROVER TO YOUR EXPENSE REPORT**

22. To insert additional approvers to the approval flow of your expense report, click the icon next to the manager/cost centre approval field.
23. An approval step is inserted immediately before your one-over-one approver.
24. Search for the additional individual by entering their last name. As you start typing, Concur will provide a list of employees that match the information entered in the search field.

Select the appropriate individual.
25. After making all the necessary changes to your workflow, click “Save Workflow” to return to your expense report.

26. The workflow for your expense report has now been modified.

27. For additional training on Concur Expense, refer to the following resources:

   In-lab training courses available on the York Employee Learning Calendar include:
   - Concur Expense: Preparing an Expense Claim
   - Concur Expense: Reviewing/Approving an Expense Claim

   On-line training materials can be accessed:
   - Using your Passport York account Click Here
   - Directly from Concur Expense by hovering over the “Help” icon and clicking “Training”

28. For additional assistance completing your profile, please contact your local power user or the expense desk. Contact information can be found here.