



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

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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

York Role	Concur terminology	Who at York
One-over-one Approver	Default approver	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.
Departmental or Faculty Reviewer	Default approver 2	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.
Cash Advance Approver	Cash Advance Approver	Individual to whom the claimant reports or their Executive Officer.
Cost centre manager/ signing authority or other approver	User added approver	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.

For **ADDITIONAL ASSISTANCE** please refer to **Point 27, below**.

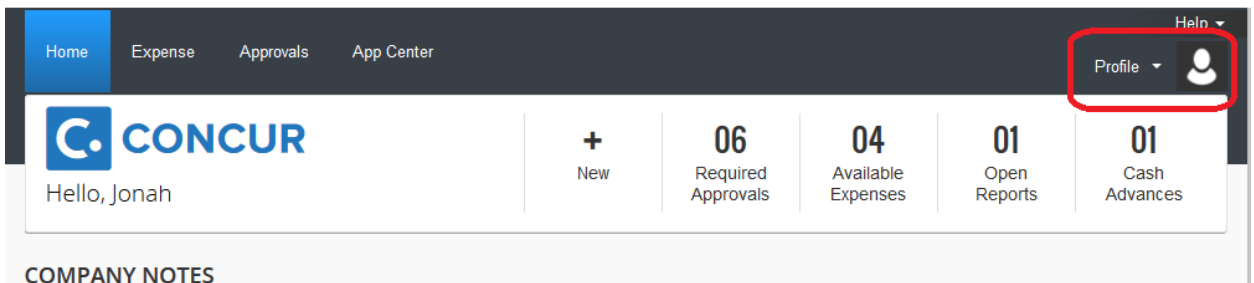
SETTING YOUR REVIEWER, APPROVER, AND CASH ADVANCE APPROVER IN YOUR CONCUR PROFILE

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.

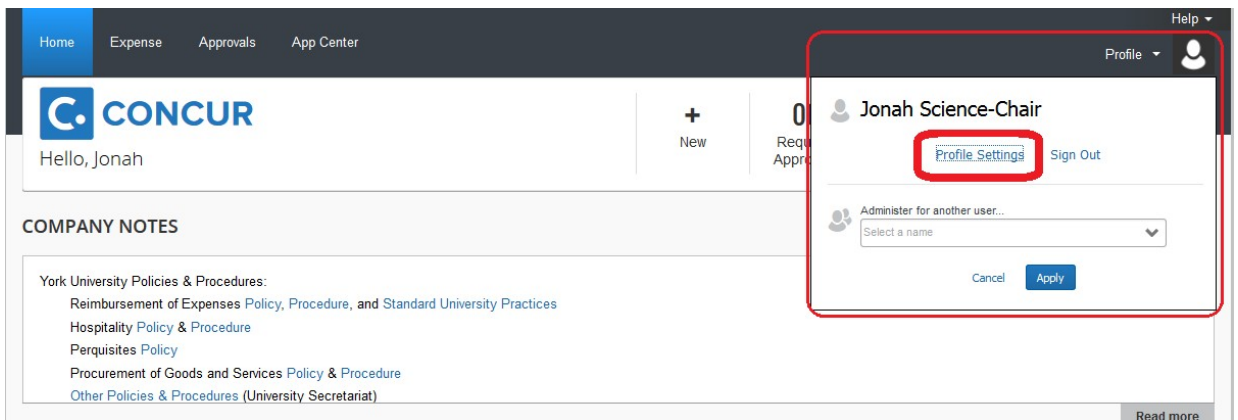
On occasion, the approval flow of a specific expense report needs to be modified. You can make changes to the default approval flow “on the fly” within the specific expense report. Instructions on how to make changes on the fly are also provided (see instructions #16 to 24)

NAVIGATING TO YOUR CONCUR PROFILE

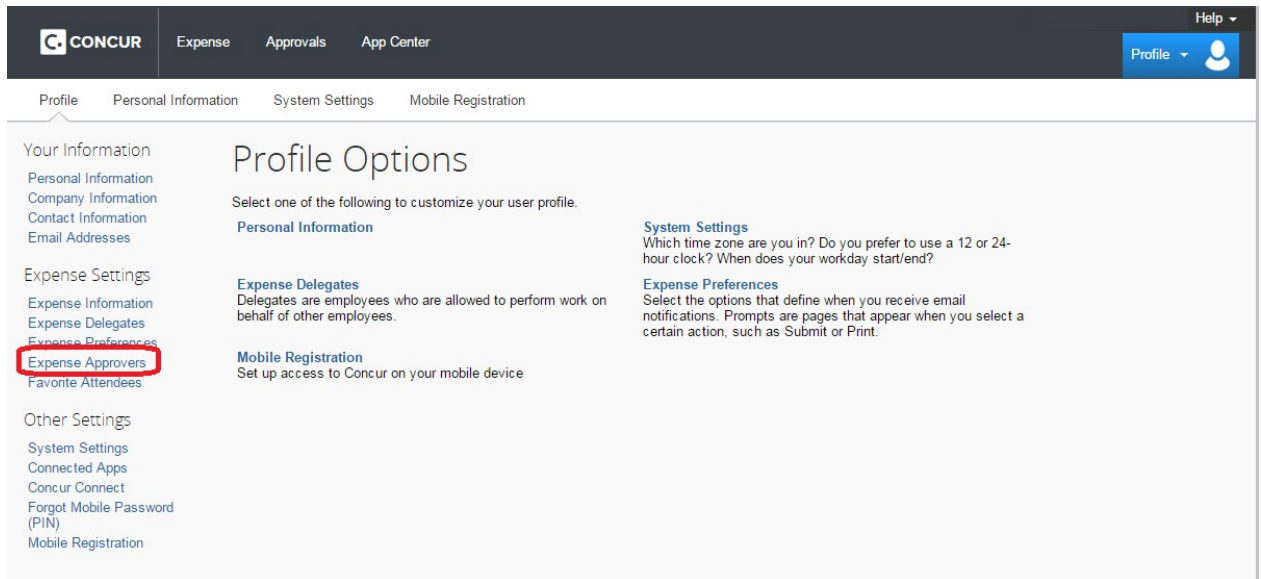
1. Log into Concur at <https://conlogin.apps06.yorku.ca/>
2. Click the **Profile** menu on the right of your screen.



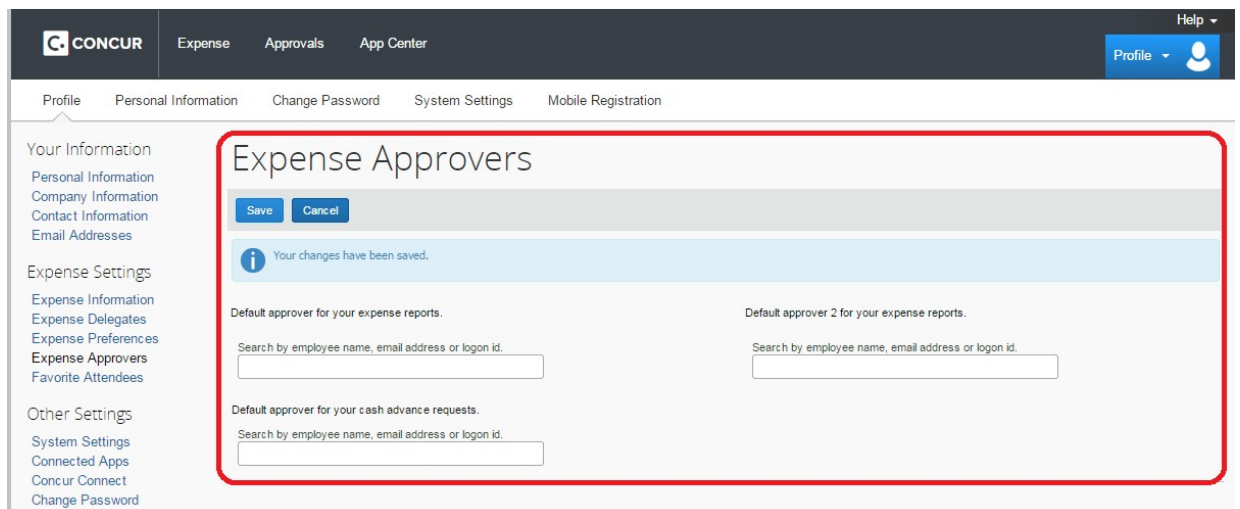
3. From the Profile menu, select **Profile Settings**.



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



- You will be directed to the Expense Approvers page of the profile.



SETTING YOUR “ONE-OVER-ONE APPROVER” IN YOUR 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.

The screenshot shows the Concur Expense Approvers settings page. The left sidebar contains navigation options: Your Information (Personal Information, Company Information, Contact Information, Email Addresses), Expense Settings (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and Other Settings (System Settings, Connected Apps, Concur Connect, Change Password). The main content area is titled 'Expense Approvers' and has 'Save' and 'Cancel' buttons. A message states 'Your changes have been saved.' There are three search fields: 'Default approver for your expense reports' (highlighted with a red box), 'Default approver 2 for your expense reports', and 'Default approver for your cash advance requests'. Each search field has the placeholder text 'Search by employee name, email address or logon id.'

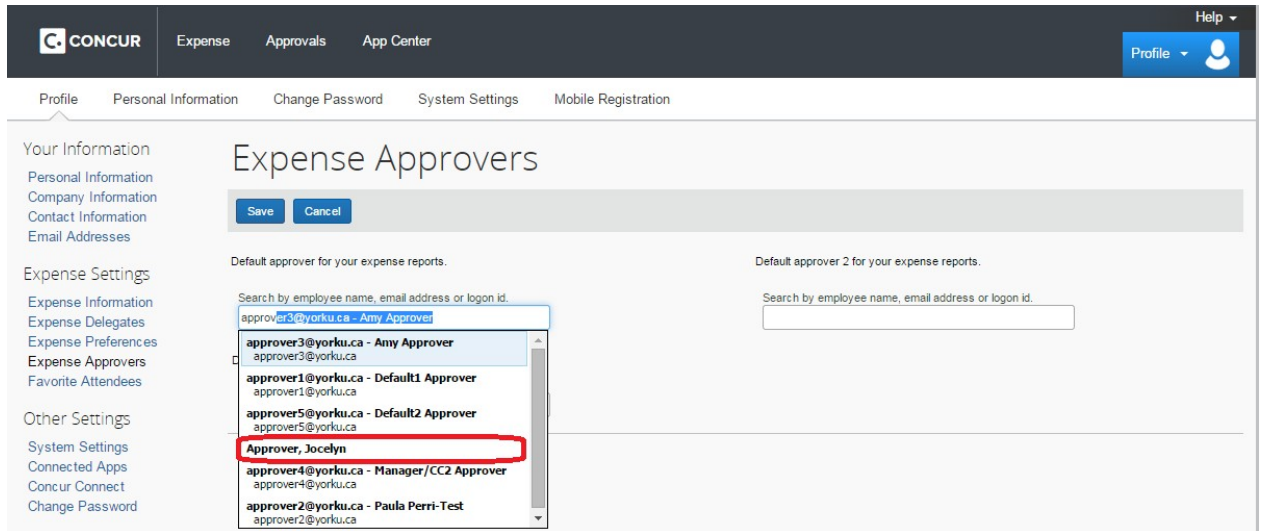
7. In the field marked “Default approver for your expense reports”, search for your “one-over-one approver” by entering their last name or email address. As you start typing, Concur will provide a list of employees that match the information you enter in the search field.

This screenshot shows the same 'Expense Approvers' settings page, but with a search dropdown menu open for the 'Default approver for your expense reports' field. The dropdown list contains the following entries:

- approver3@yorku.ca - Amy Approver
- approver3@yorku.ca - Amy Approver
- approver1@yorku.ca - Default1 Approver
- approver5@yorku.ca - Default2 Approver
- Approver, Jocelyn
- approver4@yorku.ca - Manager/CC2 Approver
- approver2@yorku.ca - Paula Perri-Test

The search field contains the text 'approver3@yorku.ca - Amy Approver'. The dropdown menu is highlighted with a red box.

8. Select the appropriate individual.



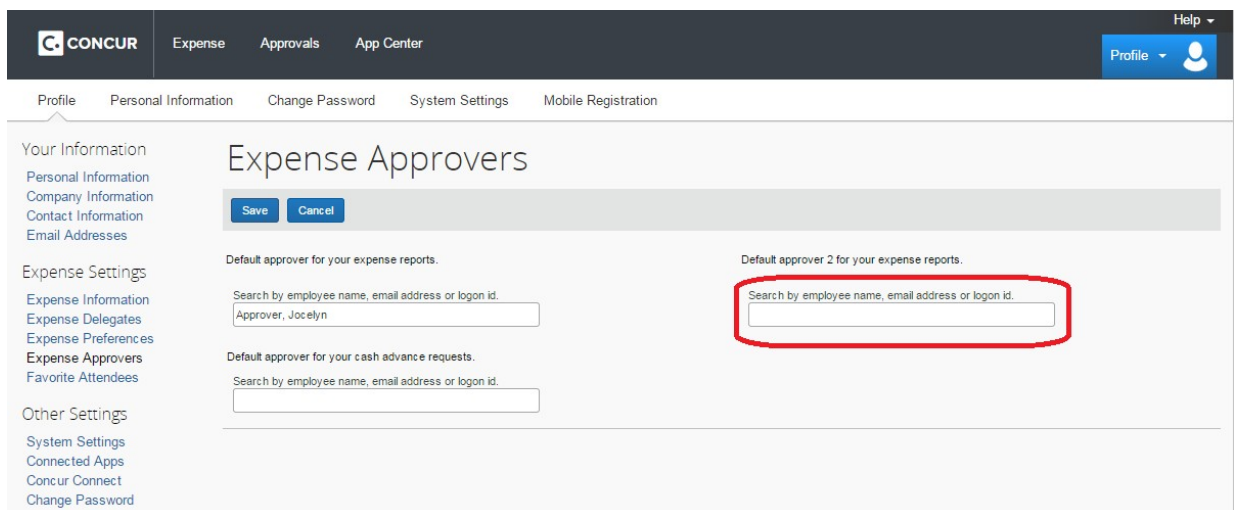
The individual selected for the Default Approver will now electronically receive your expense report for Approval.

SETTING YOUR “FACULTY/DEPARTMENTAL REVIEWER” IN YOUR PROFILE

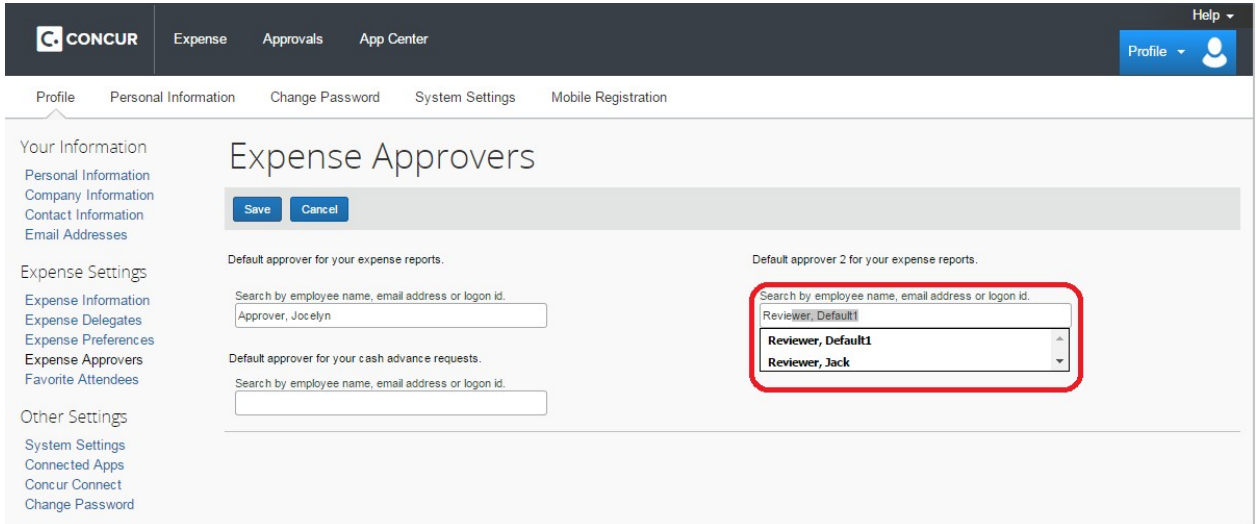
9. Click in the field marked “Default approver 2 for your expense reports”.

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.**

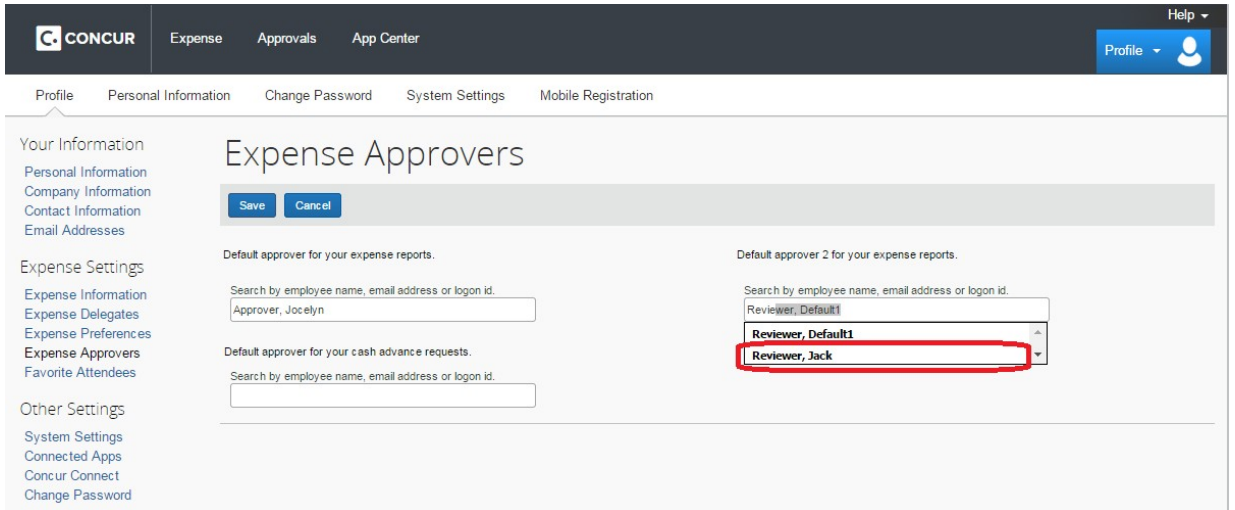
If you do not have a faculty/departmental reviewer, you may leave this field blank and skip to step #12.



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.



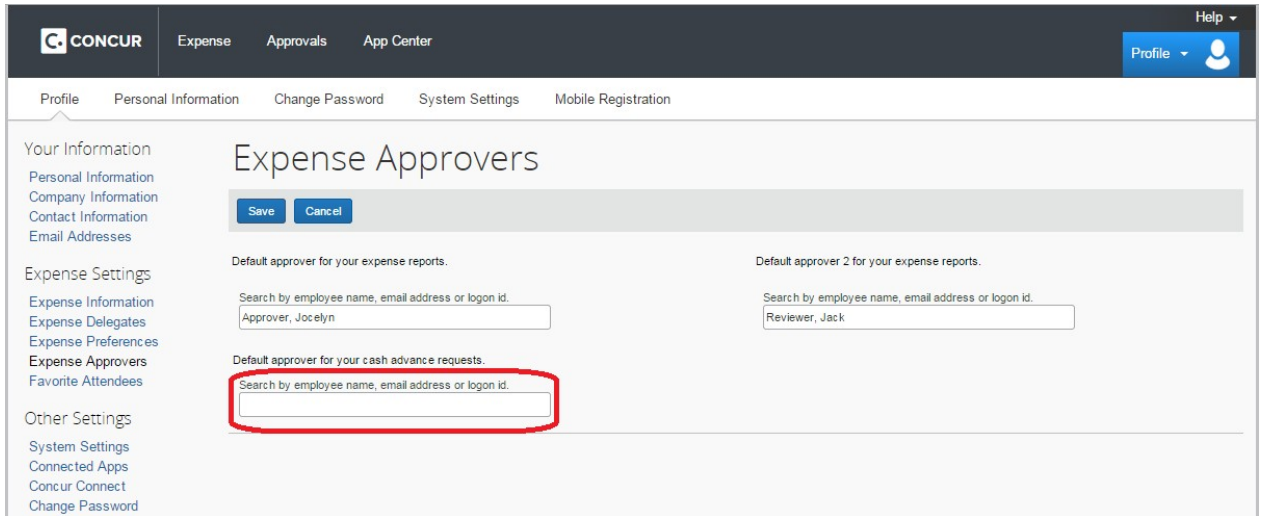
11. Select the appropriate individual.



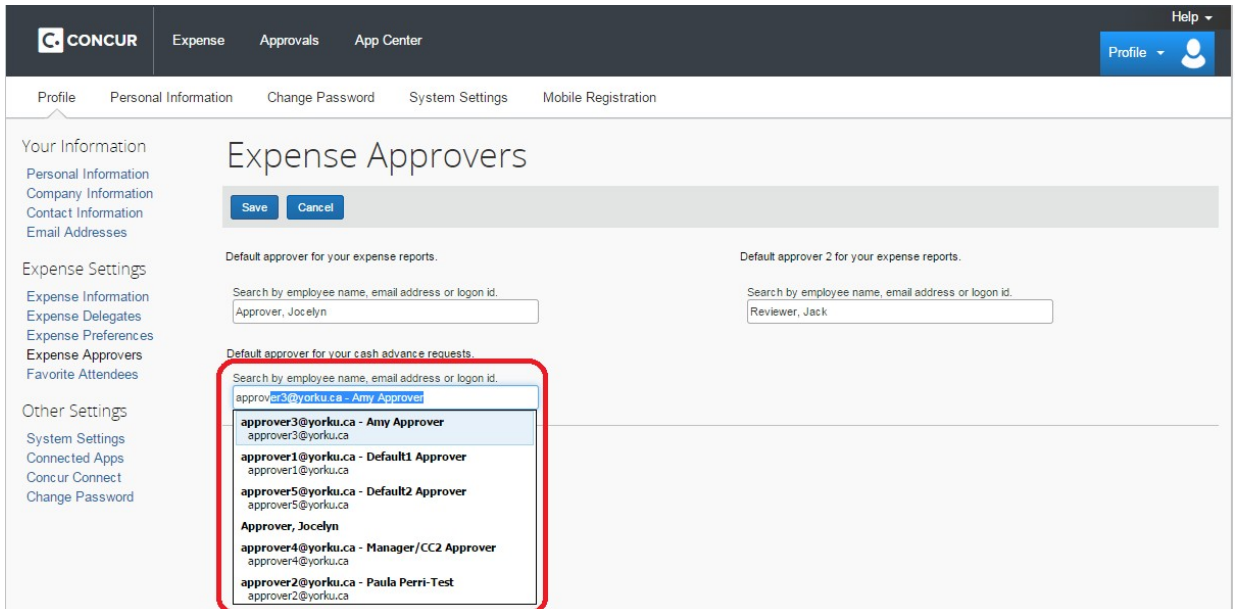
SETTING YOUR “CASH ADVANCE APPROVER” IN YOUR PROFILE

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.

The screenshot shows the 'Expense Approvers' configuration page in the Concur system. The page has a dark header with the Concur logo and navigation tabs for 'Expense', 'Approvals', and 'App Center'. A 'Profile' button is visible in the top right. Below the header, there are navigation links for 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Mobile Registration'. The main content area is titled 'Expense Approvers' and includes a 'Save' button and a 'Cancel' button. There are three search fields for selecting approvers: 'Default approver for your expense reports', 'Default approver 2 for your expense reports', and 'Default approver for your cash advance requests'. A dropdown menu is open for the 'Default approver for your cash advance requests' field, showing a list of approvers. The approver 'Approver, Jocelyn' is highlighted with a red box.

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

This screenshot shows the same 'Expense Approvers' page as the previous one, but with the 'Save' button highlighted with a red box. The dropdown menu is no longer open, and the search fields now contain the selected approver names: 'Approver, Jocelyn' for the first and third fields, and 'Reviewer, Jack' for the second field.

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

IMPORTANT: You 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.

The screenshot displays the Concur Expense report interface. At the top, the navigation bar includes 'CONCUR', 'Expense', 'Approvals', and 'App Center'. The user's profile and help options are visible on the right. The main header shows 'AIM Symposium on PCF rational maps' with 'Delete Report' and 'Submit Report' buttons. Below the header, there are buttons for '+ New Expense', 'Details' (highlighted with a red box), 'Receipts', and 'Print / Email'. The 'Exceptions' section contains a table with the following data:

Expense	Date	Amount	Exception
Airfare	12/29/2014	CAD 963.00	Business class transportation may only be taken in exceptional circumstances, shall be supported by a detailed explanation (including a doctor's letter where business class is required for medical reasons), and shall be pre-approved by a Vice-President. Please attach supporting documentation.

The 'Expenses' section shows a table with columns for Date, Expense, Amount, and Requested. The total amount is CAD 2,954.66 and the total requested is CAD 2,954.66. The 'New Expense' sidebar on the right includes a search field and lists of 'Recently Used Expense Types' and 'All Expense Types'.

18. Select "Approval Flow" from the drop down menu.

The screenshot shows the Concur Expense report interface for a report titled "AIM Symposium on PCF rational maps". A dropdown menu is open over the "Report" section, with "Approval Flow" highlighted in red. The background shows a table of expenses with columns for "Amount" and "Requested".

Expense	Date	Amount	Requested
Airfare	12/29/2014	CAD 62.75 USD 53.00	CAD 62.75
Expense	01/08/2015	CAD 62.75 USD 53.00	CAD 62.75
Expense	01/08/2015	CAD 1,361.60 USD 1,150.00	CAD 1,361.60
Expense	01/07/2015	CAD 62.39 USD 53.00	CAD 62.39

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.

The screenshot shows the "Approval Flow for Report: AIM Symposium on PCF rational maps" screen. The screen is divided into several sections for adding approvers:

- Faculty/Department Review:** Reviewer, Jack (this step may be skipped)
- Financial Review:** (empty field)
- 2nd Level Financial Review (For Finance Use Only):** (empty field, this step may be skipped)
- Manager/Cost Centre Approval (please add additional approvers if required by policy):** Approver, Jocelyn (this step may be skipped)
- Payment Processing:** (empty field)

Red boxes highlight the "Reviewer, Jack" and "Approver, Jocelyn" fields, with red arrows pointing to them. At the bottom, there are buttons for "Submit Report", "Save Workflow", and "Cancel".

TOTAL AMOUNT: CAD 2,954.66
TOTAL REQUESTED: CAD 2,954.66

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.

The screenshot shows the 'Approval Flow for Report: AIM Symposium on PCF rational maps' in the Concur system. The interface includes a navigation bar with 'CONCUR', 'Expense', 'Approvals', and 'App Center'. The main content area displays the report details and approval steps. Two red boxes highlight the 'Faculty/Department Review' field (containing 'Reviewer, Jack') and the 'Manager/Cost Centre Approval' field (containing 'costc' with a dropdown menu showing 'Costcentre, Jake'). Red arrows point from the text instructions to these fields. The bottom of the screen shows summary information: 'TOTAL AMOUNT CAD 2,954.66' and 'TOTAL REQUESTED CAD 2,954.66'. Buttons for 'Submit Report', 'Save Workflow', and 'Cancel' are visible at the bottom of the approval flow window.

21. Review the revised workflow and click “Save Workflow”.


The screenshot displays the Concur Expense report configuration interface. A modal window titled "Approval Flow for Report: AIM Symposium on PCF rational maps" is open, showing a sequence of review steps:

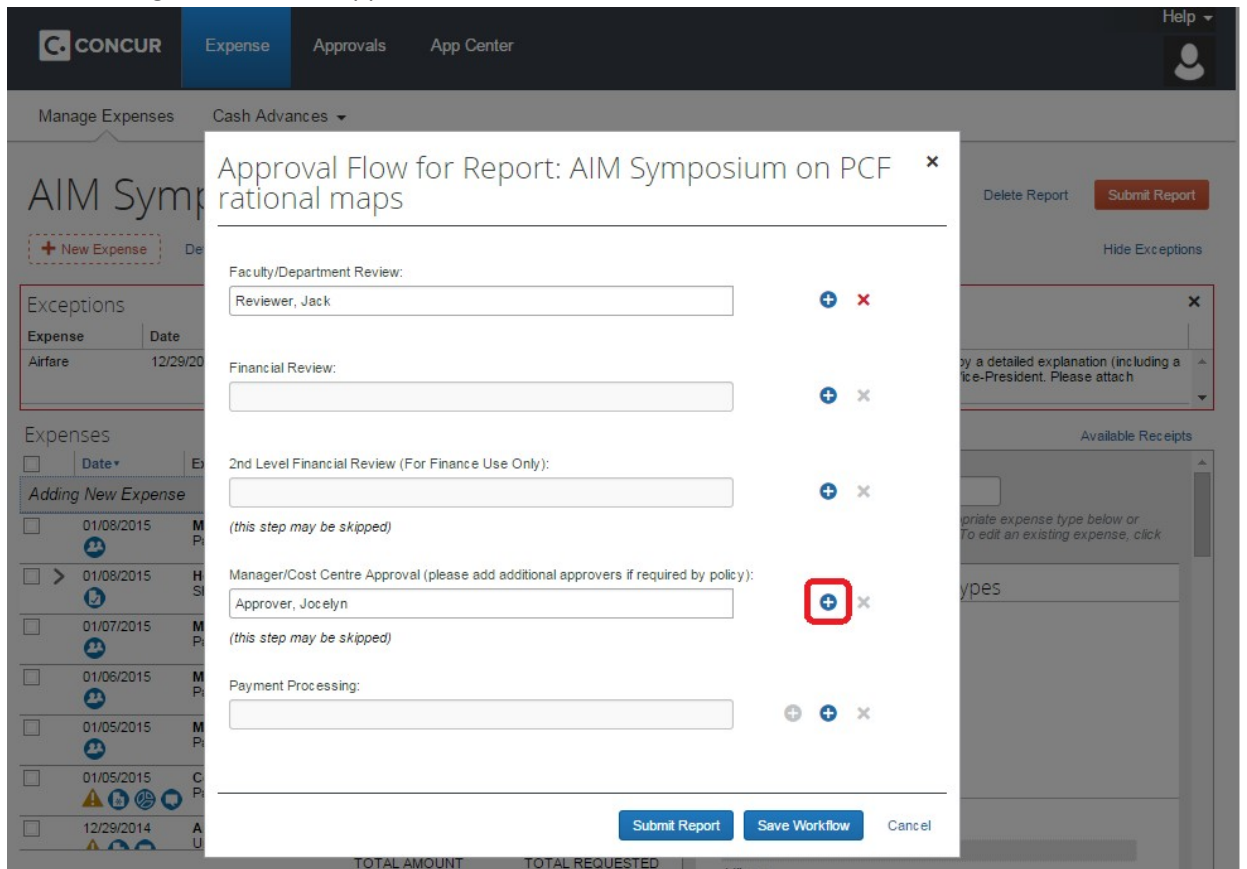
- Faculty/Department Review: Reviewer, Jack
- Financial Review:
- 2nd Level Financial Review (For Finance Use Only): (this step may be skipped)
- Manager/Cost Centre Approval (please add additional approvers if required by policy): Costcentre, Jake (this step may be skipped)
- Payment Processing:

At the bottom of the modal, there are three buttons: "Submit Report", "Save Workflow" (highlighted with a red circle), and "Cancel".

The background interface shows the main report details, including the title "AIM Symposium on PCF rational maps", a "New Expense" button, and a table of exceptions. The total amount and total requested are both listed as CAD 2,954.66.

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.



The screenshot displays the Concur Expense Report interface. The main header shows 'CONCUR' and navigation tabs for 'Expense', 'Approvals', and 'App Center'. The current report is titled 'AIM Symposium on PCF rational maps'. A modal dialog box titled 'Approval Flow for Report: AIM Symposium on PCF rational maps' is open, showing the following steps:

- Faculty/Department Review: Reviewer, Jack
- Financial Review:
- 2nd Level Financial Review (For Finance Use Only):
- Manager/Cost Centre Approval (please add additional approvers if required by policy): Approver, Jocelyn
- Payment Processing:

The plus icon next to the 'Manager/Cost Centre Approval' step is highlighted with a red box, indicating where to click to add an additional approver. At the bottom of the dialog, there are buttons for 'Submit Report', 'Save Workflow', and 'Cancel'.

23. An approval step is inserted immediately before your one-over-one approver.

The screenshot shows the Concur Expense report configuration interface. A modal window titled "Approval Flow for Report: AIM Symposium on PCF rational maps" is open, allowing the user to define the approval steps. The steps listed are:

- Faculty/Department Review: Reviewer, Jack
- Financial Review:
- 2nd Level Financial Review (For Finance Use Only): (this step may be skipped)
- User-Added Approver: (highlighted with a red box)
- Manager/Cost Centre Approval (please add additional approvers if required by policy): Approver, Jocelyn
- (this step may be skipped)

At the bottom of the modal, there are buttons for "Submit Report", "Save Workflow", and "Cancel". The background shows the main report interface with a "Submit Report" button and a "Delete Report" button.

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.

The screenshot displays the Concur Expense report approval flow. The main window is titled "Approval Flow for Report: AIM Symposium on PCF rational maps". The interface shows a list of review steps:

- Faculty/Department Review: Reviewer, Jack
- Financial Review:
- 2nd Level Financial Review (For Finance Use Only):
- User-Added Approver: (highlighted with a red box) Search dropdown shows "costc|" and "Costcentre, Jake".
- Approver, Jocelyn

At the bottom of the window, there are buttons for "Submit Report", "Save Workflow", and "Cancel".

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

The screenshot shows the Concur Expense interface with a modal dialog box titled "Approval Flow for Report: AIM Symposium on PCF rational maps". The dialog box contains the following sections:

- Faculty/Department Review:** A text input field containing "Reviewer, Jack" with a blue "+" icon and a red "x" icon to its right.
- Financial Review:** An empty text input field with a blue "+" icon and a red "x" icon to its right.
- 2nd Level Financial Review (For Finance Use Only):** An empty text input field with a blue "+" icon and a red "x" icon to its right. Below the field is the text "(this step may be skipped)".
- User-Added Approver:** A text input field containing "Costcentre, Jake" with a blue "+" icon and a red "x" icon to its right.
- Manager/Cost Centre Approval (please add additional approvers if required by policy):** A text input field containing "Approver, Jocelyn" with a blue "+" icon and a red "x" icon to its right. Below the field is the text "(this step may be skipped)".

At the bottom of the dialog box, there are three buttons: "Submit Report", "Save Workflow" (which is highlighted with a red box), and "Cancel".

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

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”

For additional assistance completing your profile, please contact your local power user or the expense desk. Contact information can be found [here](#).