CU Concur Tip: How is Expense Report approval workflow determined?

What is It?

The approval workflow for your Expense Report (the approvers your Expense Report is routed to) is determined by the Departmental information and ChartString information in the Report Header of your Expense Report. Refer to the Concur Approval Workflow job aid for additional detail.

Your Departmental information at the top of the Expense Report Header is defaulted from your Concur Profile, which is pre-populated from PAC, but you can edit the information in your Expense Report. The ChartString is also defaulted from what you entered in your Concur Profile, but you can also edit the ChartField information in your Expense Report.

By changing the Departmental or the ChartString information, the approval workflow may change depending on the update.

Who's it for?

Anyone who uses Concur to submit Expense Reports.

How do I do it?

Log in to Concur, click **Expense** tab and click **Create New Report**.

The Create New Report (Report Header) screen appears.

Important Note: *The values displayed in all graphics are for example purposes only. Be sure the Departmental and ChartField values are relevant and correct for your Expense Report.*

Departmental Information and Workflow

At the top of the Report Header, the School, Division, Sub-Division and Admin Department default from your Concur Profile and impact workflow routing.

- Expense Reports will route to your Supervisor or an Initial Reviewer if no Supervisor is assigned.
- The **Admin Department** will drive approval workflow routing to the Initial Reviewer, when applicable.
- The **Division** will drive workflow routing to Senior Business Officers, when applicable.

Notice that each Departmental field is numbered in the illustration. If you are editing Departmental fields, the values for each field are a connected list and need to be entered in sequential order. Refer to the How do I edit the ChartString in my Expense Report? Concur Tip for instructions on editing both Departmental and ChartField values.

ChartField Information and Approval Workflow

The GL BU (1), Department (2), PC Business Unit (3), Project (4), and Activity (5) ChartFields on the Expense Report Header are defaulted from your Profile.

- The **Department** and dollar amount of the Expense Report drive workflow routing to the Financial Approver.

Notice that each ChartField is numbered. The values for each field are a connected list and need to be entered in sequential order. Only budget valid ChartFields are available. Refer to the How do I edit the ChartString in my Expense Report? Concur Tip for instructions on editing both Departmental and ChartField values. The ChartFields in Expense Reports can be modified by the Financial Approver, if needed.

Where do I get 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