

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.

- In **ARC**, navigate to **Main Menu > Columbia Specific > Concur > Setup > Financial Approver Default**.

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

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

School/Division (Level 4)	Department	Level 1: \$0 - \$500	Level I2: \$500 - \$2,500	Level 3: \$2,500 - \$15,000	Level4: \$15,000 - \$50,000
140000X	1402102	ar2208	ar2208	ar2208	ar2208
140000X	1403102	ks2070	ks2070	ks2070	ks2070
140000X	1404102	pr2201	pr2201	tn2311	tn2311
140000X	1404202	pr2201	pr2201	tn2311	tn2311

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

Financial Approver Defaults

School/Division **140000X** 140000X - FIN Finance
Department **1404202** 1404202 - FIN Finance Info Systems

Approver Levels

Level 1: \$0 - \$500:	<input type="text" value="pr2201"/>	Reedy,Paul	Active
Level 2: \$500 - \$2,500:	<input type="text" value="pr2201"/>	Reedy,Paul	Active
Level 3: \$2,500 - \$15,000:	<input type="text" value="tn2311"/>	Teresa Nunes	Active
Level 4: \$15,000 - \$50,000:	<input type="text" value="tn2311"/>	Teresa Nunes	Active

Please note: Approvers can be assigned at more than one Level, but they must be in sequential order.

Save **Return to Search** **Notify** **Add** **Update/Display**

- 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).
- 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.

- In **ARC**, navigate to **Main Menu > Columbia Specific > Concur > Setup > Concur Supervisor Opt-In**.

Supervisor Opt-In

Concur Supervisor Opt-In

Parameters

School Department OR User ID

Division

Sub Division

CU Admin Department

Search **Clear**

- 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.

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- 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.

Supervisor Opt-In

Concur Supervisor Opt-In

Parameters

School Department: 140000X OR User ID:

Division:

Sub Division:

CU Admin Department:

Search Results

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Select	Division	Division Descr	Sub-Division	Sub-Division Descr	Admin Dept	Admin Dept Descr	Supervisor UNI	Supervisor Name	Opt In
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141600X	1416102	Columbia Investment Mgmt. Co.	jm2529	Robert Christy	No
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	nj2200	Wm Lucky	No
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141800X	1418102	Office of Management & Budget	ds3012	Robert Guevara	No
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141800X	1418102	Office of Management & Budget	cb3166	Bruce Markert	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	bk2430	Michael Gambelli	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	ks2070	Curtis Griffin	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	160200X	1602102	FIN Finance Business Services	tn2311	Jayna Mahanidge	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140300X	1403102	Finance Human Resources	ms5215	Patrick Morris	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140400X	1404102	Finance Service Center	js4278	Janet Shults	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	pr2201	Kelly Weston	Yes

Select All Clear All

- Click the **Checkbox(es)** from the **Select** column to select the desired Supervisor(s) not already opted-in to opt them in.

Search Results

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Select	Division	Division Descr	Sub-Division	Sub-Division Descr	Admin Dept	Admin Dept Descr	Supervisor UNI	Supervisor Name	Opt In
<input checked="" type="checkbox"/>	140000X	FIN Finance	14AD00X	141600X	1416102	Columbia Investment Mgmt. Co.	jm2529	Robert Christy	No
<input checked="" type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	nj2200	Wm Lucky	No
<input checked="" type="checkbox"/>	140000X	FIN Finance	14AD00X	141800X	1418102	Office of Management & Budget	ds3012	Robert Guevara	No
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141800X	1418102	Office of Management & Budget	cb3166	Bruce Markert	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	bk2430	Michael Gambelli	Yes

- Click **Save**. The Opt-In column displays the updated status.

Select	Division	Division Descr	Sub-Division	Sub-Division Descr	Admin Dept	Admin Dept Descr	Supervisor UNI	Supervisor Name	Opt In
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141600X	1416102	Columbia Investment Mgmt. Co.	jm2529	Robert Christy	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	140200X	1402102	Finance	nj2200	Wm Lucky	Yes
<input type="checkbox"/>	140000X	FIN Finance	14AD00X	141800X	1418102	Office of Management & Budget	ds3012	Robert Guevara	Yes

Note: In order to change the Concur Supervisor Opt-In status from Yes to No, you must submit a Service Now incident. Indicate the type of incident you want to create (Finance), and in the description field state that the incident should be routed to the Finance Information Service team for Concur Supervisor opt-out.

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.

1. In **ARC**, navigate to **Main Menu > Columbia Specific > Concur > Setup > Employee Access Defaults**.

The screenshot shows the 'Employee Access Default Selection' page in ARC. Under the 'Parameters' section, there are search fields for 'School Department', 'Population Type', 'Job Code', and 'Opted In'. There are also 'Search' and 'Clear' buttons.

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.

The screenshot shows the 'Update Values' section with dropdowns for 'Update Travel Access To' and 'Update Expense Access To', and an 'Update Selected Rows' button. Below is the 'Search Results' table:

Select	Population Type	Job Code	Description	Empl ID	User ID	Last Name	First Name	Travel Access Flag	Expense Access Flag	Concur Status	Access Override
<input type="checkbox"/>	Officers of Administration	314117	Director - TECH	10027837	tp194	Park	Terry	No	Yes	Active	No

4. Click the **Checkbox(es)** from the **Select** column to select the desired employee(s).

The screenshot shows the 'Update Values' section with a dropdown menu open for 'Update Travel Access To' showing 'No' and 'Yes' options. The 'Update Expense Access To' dropdown is set to 'Yes'. The 'Update Selected Rows' button is visible. Below is the 'Search Results' table:

Select	Population Type	Job Code	Description	Empl ID	User ID	Last Name	First Name	Travel Access Flag	Expense Access Flag	Concur Status	Access Override
<input checked="" type="checkbox"/>	Officers of Administration	314117	Director - TECH	10027837	tp194	Park	Terry	No	Yes	Active	No

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.
6. Click **Update Selected Rows**. The **Access Override** column will indicate **Yes** for the selected employees.

The screenshot shows the 'Search Results' table with the 'Access Override' column highlighted in red. The value 'Yes' is now in the 'Access Override' column for the selected employee.

Select	Population Type	Job Code	Description	Empl ID	User ID	Last Name	First Name	Travel Access Flag	Expense Access Flag	Concur Status	Access Override
<input checked="" type="checkbox"/>	Officers of Administration	314117	Director - TECH	10027837	tp194	Park	Terry	Yes	Yes	Active	Yes

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 **Main Menu > Columbia Specific > Concur > Setup > Concur Reporting Manager Setup**.

Concur Reporting Manager Setup

Reporting Manager

School Department

Division

Sub-Division

Search

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

Concur Reporting Manager Setup

Reporting Manager

School Department

Division

Sub-Division

Search

Assign Reporting Manager

	Division	Division Descr	Sub-Division	Sub-Division Descr	Reporting Manager UNI	Reporting Manager Name
1	10SE00X	CAD Office of the SEVP	100200X	CAD Office of the SEVP	tn2311	Teresa Nunes
2	14AD00X	FIN Administration	140200X	FIN EVP of Finance	tn2311	Teresa Nunes
3	14AD00X	FIN Administration	160200X	FIN Finance Business Services	tn2311	Teresa Nunes
4	14AD00X	FIN Administration	164000X	RFS Registrar	tn2311	Teresa Nunes

Save

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 **Main Menu > 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>