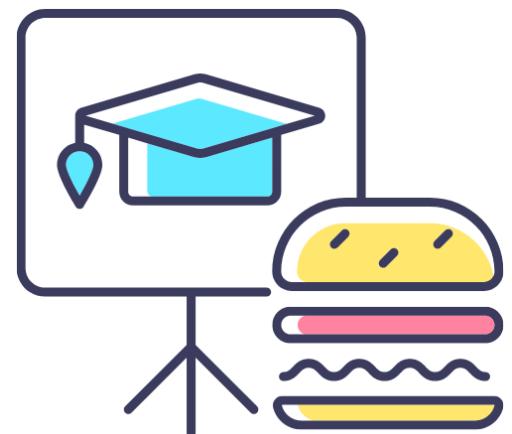


EXPLORING CONCUR WORKFLOWS

Monthly Lunch & Learn Series presented by the **FAST Team**

November 2025



UNIVERSITY OF
TORONTO

Financial Services

PRESENTER

RAMES PARAMSOTHY

SENIOR BUSINESS ANALYST (TRAINING)

Financial Advisory Services & Training (FAST)

AGENDA

- Clarifying default reviewers/approvers
- Standard Workflows – Appointed Employees
- Standard Workflows – Non-Appointed Employees
- Visitor Workflow
- Distinguishing between Approve and Forward, and the Approval Flow
- Using the Business Officer List report
- Proactive delegation of reviewers/approvers in their absense.



LEARNING OBJECTIVE



With Concur being available for all divisions as of October 14th, this session will attempt to explore standard Concur expense workflows and address common misunderstandings.

DEFAULT REVIEWERS/APPROVERS



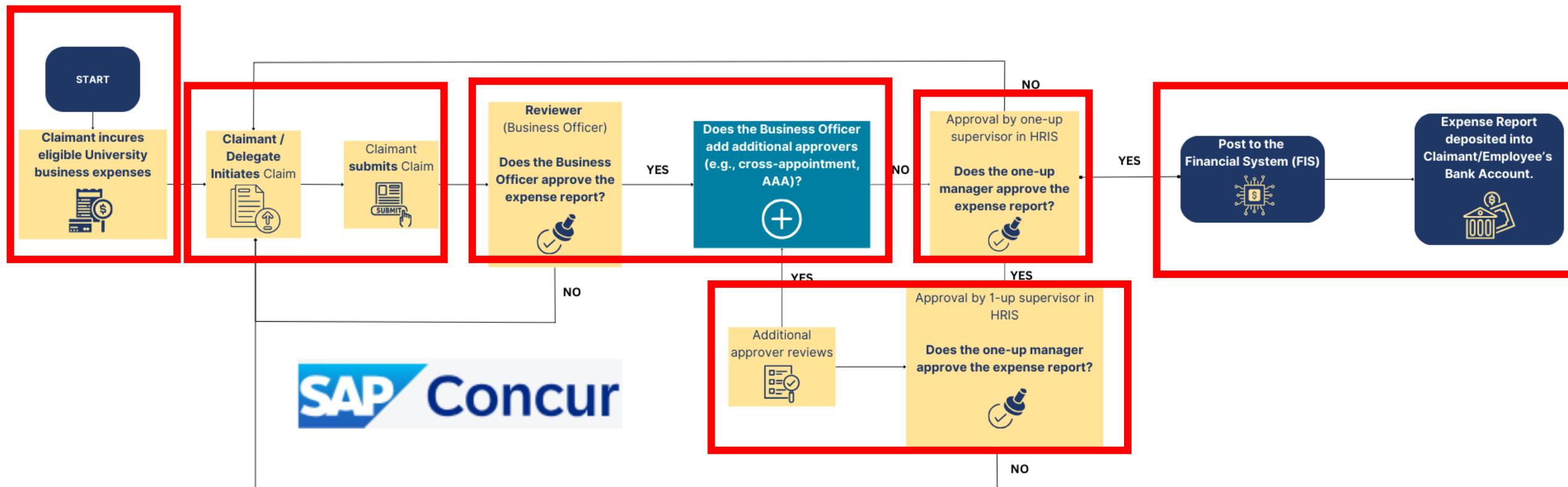
At minimum, all expense reports in Concur must be reviewed/approved by:

1. The unit's Concur Business Officer (or delegate).
2. The claimant's 1-up manager in their HR org structure.

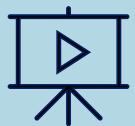
NOTE: In some circumstances, the workflow automatically directs expense reports to obtain additional approval from Accounts Payable in Financial Services.

These scenarios include when an expense report is over the thresholds (i.e. **\$10K for a non-appointed staff, or \$20K for appointed staff**), or Cash Advance requests.

APPOINTED STAFF – EXPENSE REPORT WORKFLOW



NON- APPOINTED STAFF – EXPENSE REPORT WORKFLOW



[Click here for simulations](#) related to expense reports for Non-Appointed employees.

[Click here to learn](#) more about the non-appointed workflow.

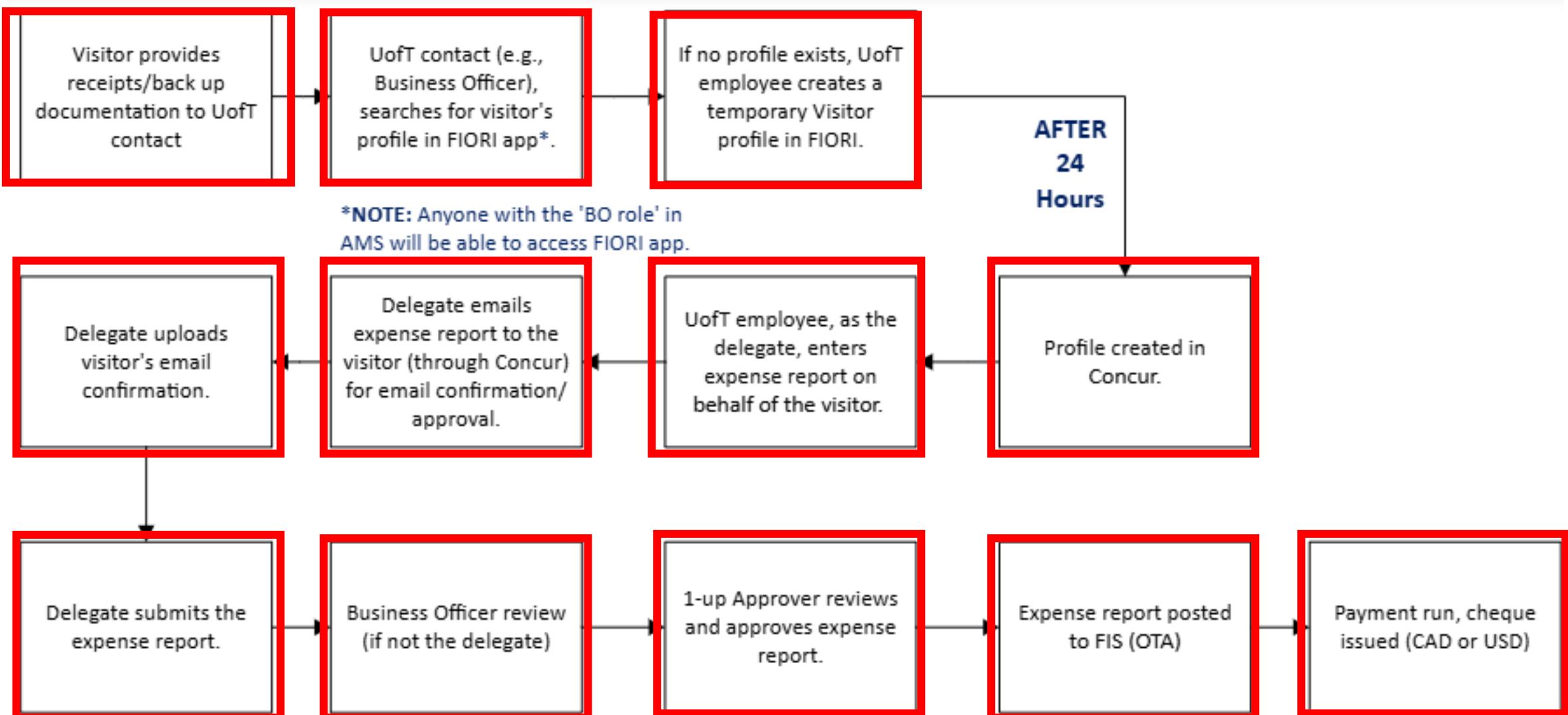
VARIATIONS OF THE STANDARD WORKFLOWS



Some divisions, such as Arts & Science, UTSC, UTM, Library and the Office of the President may have specific variations of these standard workflows.

Please speak to your divisional finance office to determine if any exist in your unit and what circumstances they may apply.

VISITOR EXPENSE REPORT WORKFLOW



IMPORTANT! Claimants who are **solely students** are not considered visitors and should follow the old process.

APPROVE AND FORWARD VS APPROVAL FLOW

There have been a notable level of confusion, particularly for Concur Business Officers who review claims from non-appointed claimants about when to use “Approve and Forward” or the “Approval Flow” to send the expense report to approvers.

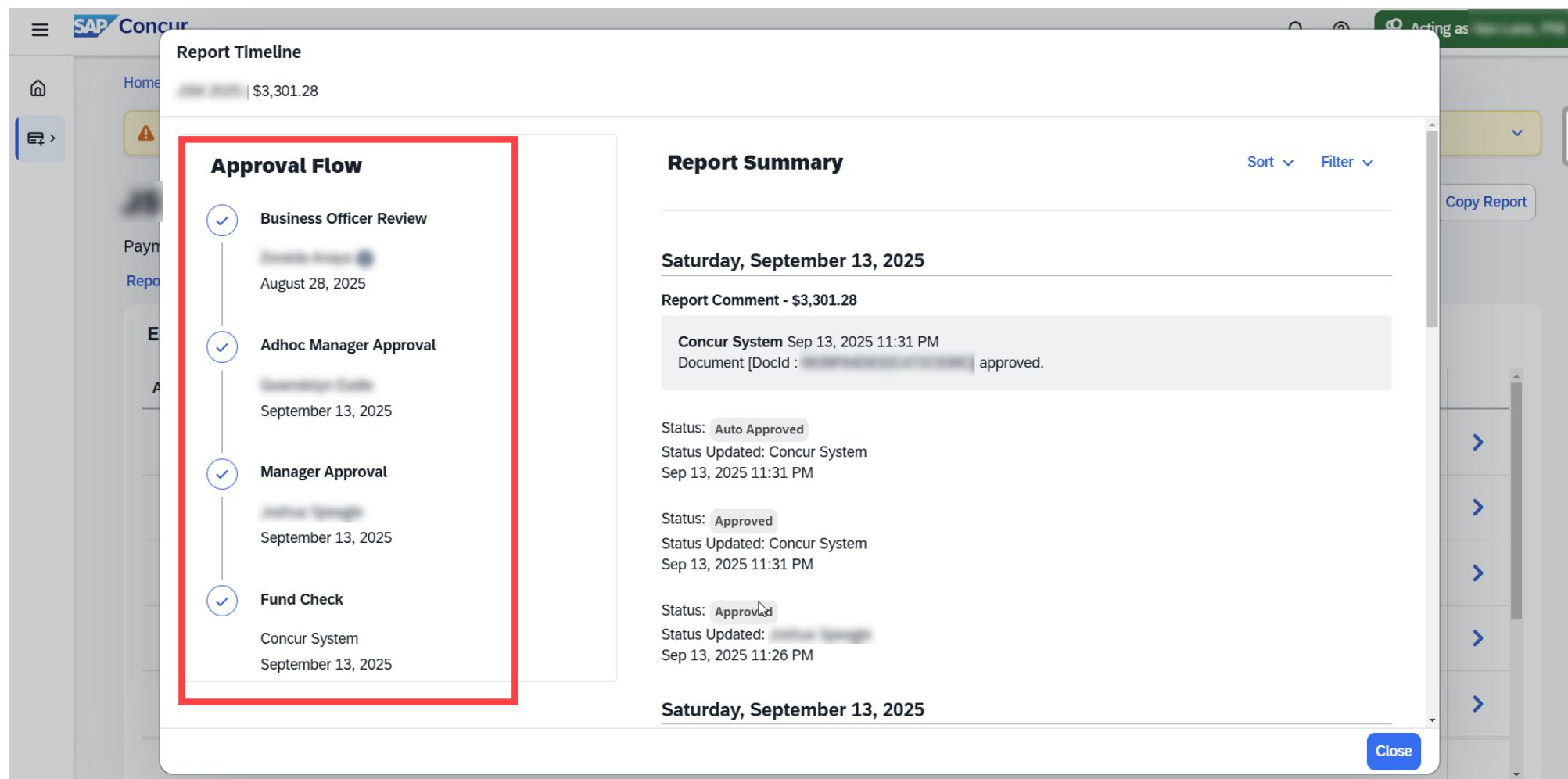
Approve & Forward	Approval Flow
<p>The expense report for an Appointed employee requires additional approval from another manager, which <u>is not</u> set up in the Concur expense workflow.</p> <p>Common examples include:</p> <ul style="list-style-type: none">• Cross-appointments• Administrative Academic Appointments (AAA)• Budget owner is located outside of the default workflow (i.e. no the 1-up manager). <p>IMPORTANT: DO NOT USE APPROVE & FORWARD for NON-APPOINTED EMPLOYEES!</p>	<ol style="list-style-type: none">1. For NON-APPOINTED claimants, use the Approval Flow to enter the claimant's Manager.2. If there are multiple levels of approval required, the Business Officer can enter all the additional approvals in the desired order (i.e. user-added approvers).

DEMO



VIEWING THE APPROVAL FLOW IN THE EXPENSE REPORT

Claimants and delegates can view/check the approval flow associated with a particular expense report through **Report Details >> Report Timeline**.



The screenshot shows the SAP Concur Report Timeline interface. On the left, a sidebar lists various report categories. The main area is titled "Report Timeline" and shows a summary of the report: \$3,301.28. Below this, the "Approval Flow" section is highlighted with a red box. It lists the following steps:

- Business Officer Review (Completed on August 28, 2025)
- Adhoc Manager Approval (Completed on September 13, 2025)
- Manager Approval (Completed on September 13, 2025)
- Fund Check (Completed by Concur System on September 13, 2025)

On the right, the "Report Summary" section shows the following details:

- Saturday, September 13, 2025**
- Report Comment - \$3,301.28**
- Concur System** Sep 13, 2025 11:31 PM Document [DocId: [REDACTED]] approved.
- Status: Auto Approved**
Status Updated: Concur System Sep 13, 2025 11:31 PM
- Status: Approved**
Status Updated: Concur System Sep 13, 2025 11:31 PM
- Status: Approved**
Status Updated: [REDACTED] Sep 13, 2025 11:26 PM

At the bottom right, there is a "Close" button.

LOCATING CONTACTS IN OTHER UNITS

In situations where the default Concur Business Officer needs to forward an expense report to someone in another unit, run the Business Officer List Report in AMS to identify the Business Officer in that unit.

[Click here for a guide on how to locate and execute the report.](#)

Business Officer List for Concur



Org. U...	Object Name	Divisi...	Division Name	Positi...	PersNo	Employee Name	Email
20	School of Graduate Studies			11040	111184	Evelyn Szeto	evelyn.szeto@utoronto.ca
322	General University			3942	41275	Arin De Fazio	a.defazio@utoronto.ca
302	Asst V-P Facilities & Services	35	Asst VP - Operations & Services	24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
303	Conference Services	35		56907	11702...	Elsa Alpirez Reyes	elsa.alpirezreyes@utoronto.ca
305	Campus Mail Services	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
307	Admin&Gen Serv-12	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
310	F.&S. Utilities -05	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
311	F.&S. Utilities -06	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
312	Campus Safety	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
313	Campus Safety-Admin	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
314	F.&S. Bldgs & Grounds -01	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
315	F.&S. Bldgs & Grounds -02	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
316	F.&S. Bldgs & Grounds -03	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
317	F.&S. Bldgs & Grounds -04	35		24111	12354...	Makram Ataya	MOKA.ATAYA@UTORONTO.CA
318	Residences	35		56907	11702...	Elsa Alpirez Reyes	elsa.alpirezreyes@utoronto.ca

PROACTIVE DELEGATION OF APPROVERS PRIOR TO LEAVES

If the default reviewer/approver (i.e. Business Officer or 1-up manager) is going on a leave longer than 2 weeks, ensure they proactively set up a delegate who will review/approve on their behalf in their absence.

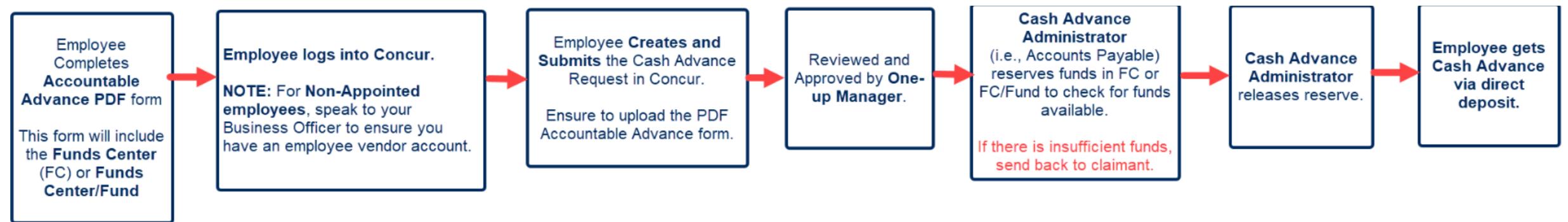
NOTE: According to policy, 1-up approvers can only delegate to:

- their supervisor (i.e. claimant's 2-up in the org structure) OR
- if going on a long-term leave (e.g., sabbatical), and someone is taking over all of their responsibilities (e.g., Acting Chair) and the Delegation of Authority form is signed then that person could be the delegate

CASH ADVANCE WORKFLOW

When all options are exhausted, employees can request Cash Advances in Concur.

NOTE: Please consider the BMO T&H card as a possible option, since it is integrated with Concur and paid directly by the University.



WHO DO I CONTACT?



1. **Concur Travel (concur.travel@utoronto.ca)**

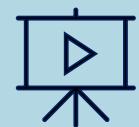
General inbox for questions about all aspects of Concur, including the implementation, rollout, access and troubleshooting issues.

2. **FAST (fast.help@utoronto.ca)**

Ongoing questions about the Guide to Financial Management (GTFM), training, and support questions.

3. **Procurement Services (purchasing.help@utoronto.ca)**

Questions regarding the new BMO Travel & Hospitality (T&H) credit card.



Click here to browse our
[Concur Support page](#).



The background features a dark blue gradient with a subtle texture. Overlaid on the left side is a complex, abstract white line drawing. The lines form various geometric shapes, including triangles and a large, irregular polygon. Some lines are straight, while others are curved or have small segments. The overall effect is minimalist and modern.

THANK YOU!