



Updating Concur Report Approver

When a UCSB employee submits a reimbursement report through Concur, the workflow defaults to the Department Expense Approver (DEA) for the employee’s home department. When the funding source is managed by another department, this approver should be changed to that department’s DEA.

Before submitting an expense report for review, make sure to update the approval workflow first.

1. Navigate to the *Report Details* dropdown and select *Report Timeline*.

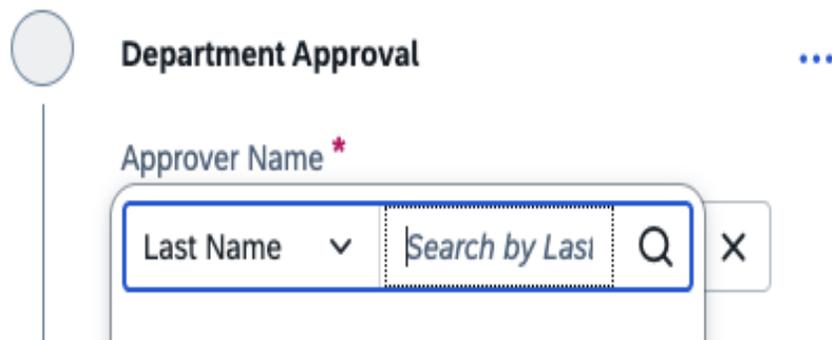
The screenshot shows the SAP Concur interface. At the top left is a hamburger menu icon followed by the SAP Concur logo. Below this is a breadcrumb link: < Expense Reports. The main heading is **Concur practice \$0.00**. Below the heading is a status badge 'Not Submitted' and the text 'Report number: UHZ638'. There are three dropdown menus: 'Report Details', 'Print/Share', and 'Manage Receipts'. The 'Report Details' dropdown is open, showing a list of options: 'Report', 'Report Header', 'Report Totals', 'Report Timeline' (which is highlighted with a blue border), 'Audit Trail', 'Linked Add-ons', and 'Manage Requests'.

2. To the right of *Approval Flow*, select *Edit*.

Approval Flow

Edit

3. Set Department Approval to be the desired DEA. For IEE, this is the Financial Manager. Make sure to select the *Save* button in the bottom right corner.



The screenshot shows a form titled "Department Approval" with a three-dot menu icon to its right. Below the title is a field labeled "Approver Name" with a red asterisk indicating it is required. A search box is open, showing a dropdown menu with "Last Name" selected, a search input field containing "Search by Last", a search icon (magnifying glass), and a close icon (X).

4. If a Concur report is returned to the employee for corrections, the Approver Flow may reset and must be updated again (*repeating the above steps*) upon submission.