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Assigning Budget and Project Expense Approvers (Web Application)

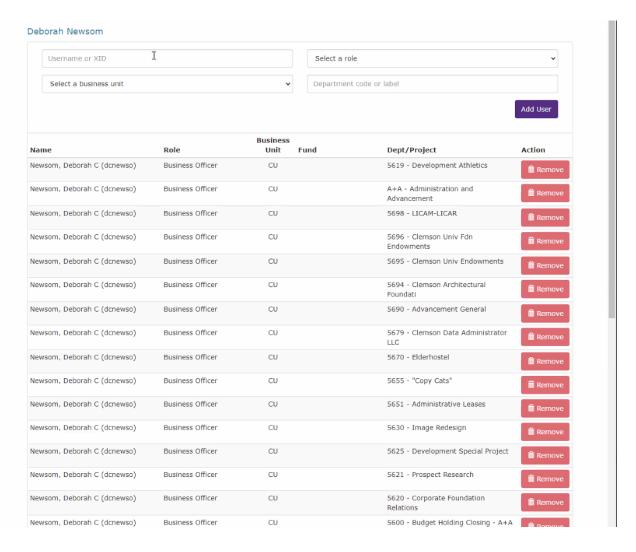


Assigning Budget and Project Expense Approvers (Web Application)

Within Concur, all expense approvals will automatically route to the business officer assigned to each budget center. If certain projects need to be approved by someone else (ex: a grant project expense needs a grant coordinator to approve), that person must be assigned to the correct, specific budget center or grant project number within the web application provided. Those updates will then be loaded into Concur overnight.

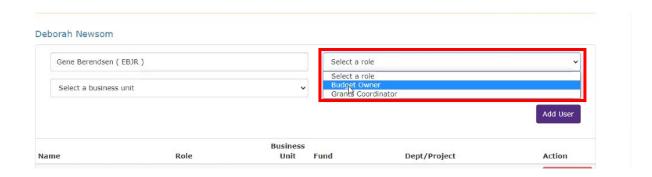
The web application cane be found here: https://concur-support.app.clemson.edu/manage/roles.php. The standard Clemson Single Sign On (SSO) screen will be how you log in.

1. Once you are logged into the web app, the home screen will show you as being assigned to all of the applicable budget centers.

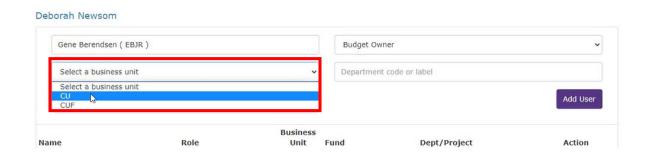


2. To add a different approver, click within the **Username or XID** field and enter either the needed approver's username or XID number. The app will search for the person – click on the correct approver's name once it appears in order to select it.

3. Use the dropdown within the **Select a role** field to choose either Budget Owner (if assigning a budget to the approver) or Grants Coordinator (if assigning a grants project to the approver).

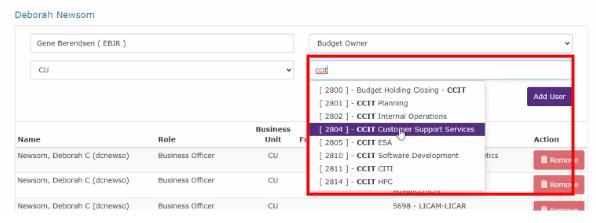


4. In the **Select a business unit** field, select the correct Business Unit (either CU for Clemson University or CUF for Clemson University Foundation).



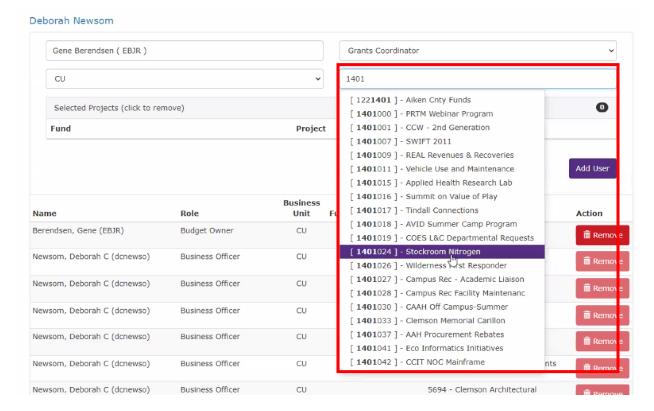
5. The fourth field will change depending on which type of approver you are adding.

a. If you are assigning a Budget Owner, enter the department code or name into the Department code or label field. The app will search for the correct budget. Once you see it in the dropdown, click on it.

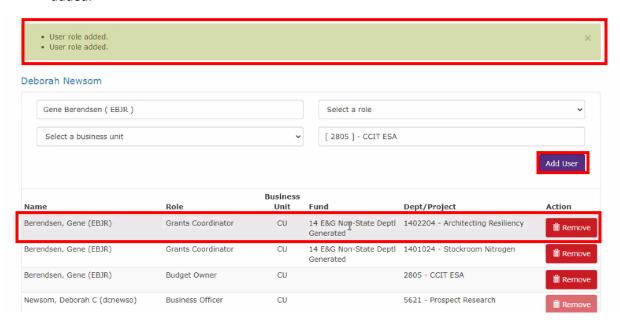


b. If you are assigning a Grants Coordinator, enter the project number or name of the project into the Project code or name field. The app will search for the correct project. Once you see it in the dropdown, click on it.

Note: if a Grants Coordinator should be approving expenses from multiple project numbers, you can use this step to add all appropriate projects at once (the app will allow you to add multiple projects before step 6).



6. Once all information is completed, click **Add User**. You will now see the new approver added to your main screen list and a green banner at the top will confirm that the approver has been added.



7. The new approver assignment will update overnight and will be applied within Concur the next day.