

ESTABLISHING THE DEFAULT APPROVERS AND FOAP

Concur expense management system

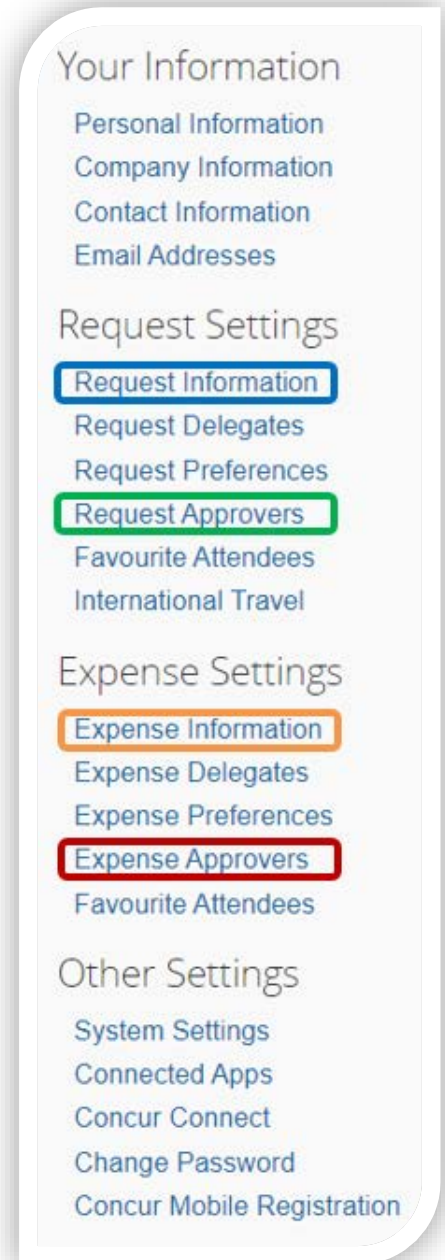
Before a first claim, users must establish their default approvers as well as the default FOAP.

ESTABLISHING THE DEFAULT APPROVERS

1. In Concur, in the upper right corner, select **Profile > Profile Settings**.
2. In the column on the left (**red** box), select **Expense Approvers**.
3. Identify your default approvers, keeping in mind the following:
 - a. Approver 1—Immediate Supervisor
 - b. Approver 2—Fund Manager
4. Select **Save**.
5. Select **Request Approvers** (**green** box).
6. Identify your default approvers for requests (Cash Advances).
7. Select **Save**.

ESTABLISHING THE DEFAULT FOAP

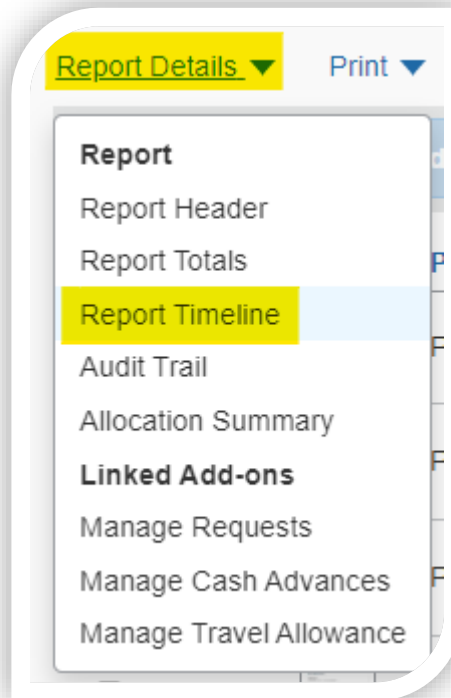
1. In Concur, in the upper right corner, select **Profile > Profile Settings**.
2. In the column on the left (**orange** box), select **Expense Information**.
3. Enter the default FOAP for your expense reports and select **Save**.
4. In the column on the left (**blue** box), select **Request Information**.
5. Enter the default FOAP for your cash advances and select **Save**.



CHANGING THE APPROVERS FOR A SPECIFIC CLAIM

If someone other than the default approvers must approve a specific claim, you must edit the Approval Flow of the claim and make sure that the right approvers are identified before submitting the claim. To do so:

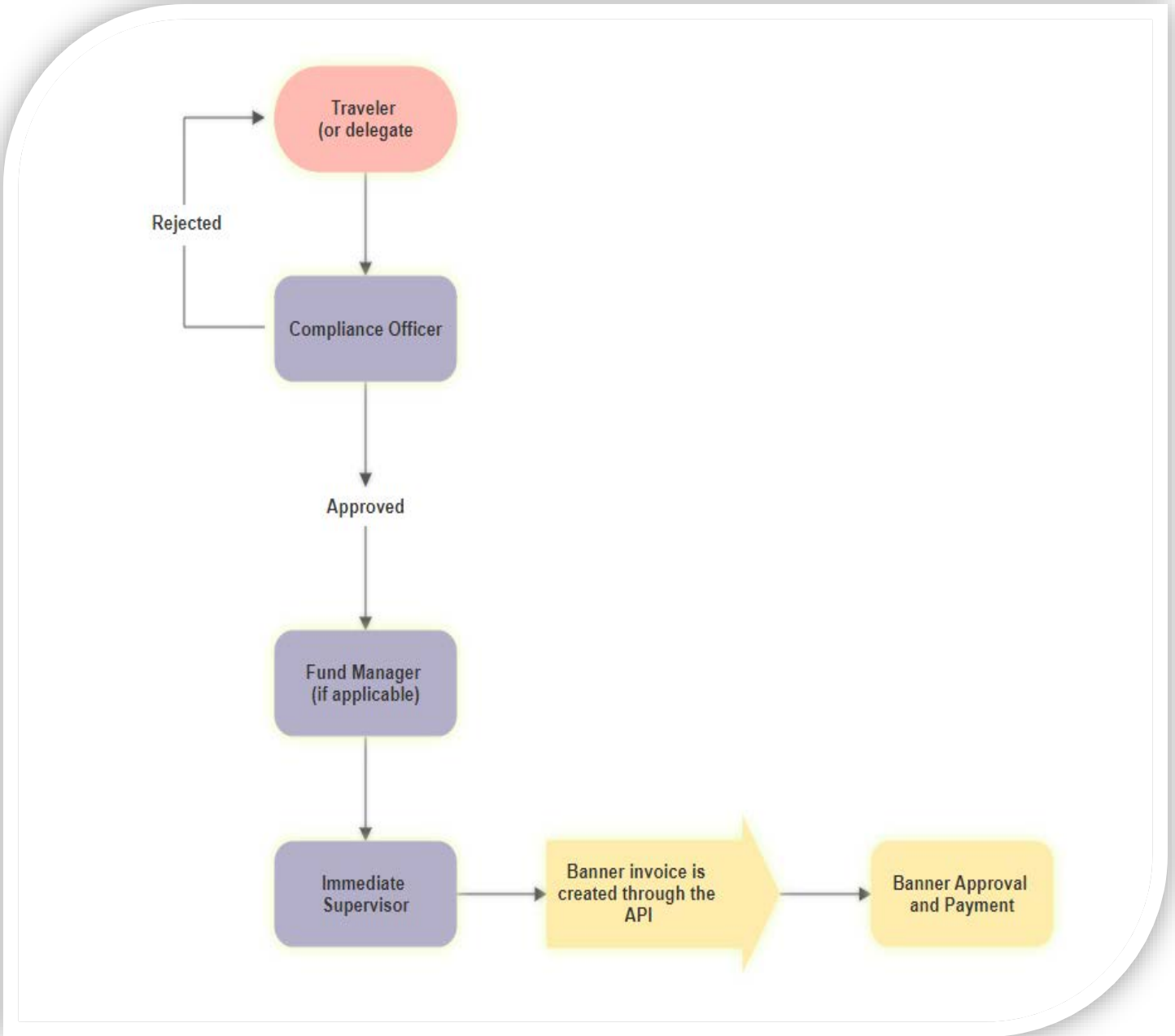
1. From the claim report screen, select **Report Details > Report Timeline**.



2. On the left side of the report timeline screen, you will find the approval flow with your default approvers. Select **Edit** to choose the appropriate approvers for this specific claim.
3. Select **Save**.

Note: In the appendixes, you will find the Approval Flow for each claim (Appendix A) as well as useful tips and tricks to easily find your FOAP in the drop-down menus (Appendix B).

APPENDIX A—APPROVAL FLOW



APPENDIX B—CHOOSING A FOAP

To find a FOAP by fund owner name:

1. Select the list button.
2. Select search by text.
3. Type an asterisk (*) followed by the first letters of the last name of the fund owner, as shown in the screenshot below.

