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Concur Approver Change Project [1]

Overview

The Procurement Service Center (PSC), in partnership with the campus Controller's Offices, is announcing an upcoming enhancement to the university's expense report approval process that is planned for implementation in 2027.

To strengthen financial governance, accountability, and internal controls, the university will transition to a consolidated approval model. This change is the result of a comprehensive review of our expense approval processes following audit findings and subsequent action plans related to Procurement Card and other expense report approvals.

Concur Approver Change Webinar Slides [2]

Target Go-Live: Late Summer 2027

What’s Changing

The future-state approval framework will route all reports to department-designated **Fiscal Staff in PeopleSoft**. This will eliminate the current Approving Official role as well as the HR Supervisor approval routing on all expense report processing.

System Changes

- HR Supervisor approval routing option will be removed from the header on non-PCard reports. Reports will route only to the selected designated Fiscal Staff as determined by the departments.
- Current default Approving Official (AO) approval routing will be removed from Procurement Card (PCard) reports.
- SpeedType assignment will be added to PCard report headers for approval routing.
- PCard workflows will be updated to the department-designated Fiscal Staff for approvals.
- The AO role and assignments will be removed in Concur, US Bank, and PeopleSoft.
- Card Services Request workflows will be updated from AOs to department-designated Fiscal Staff.
- User-added (additional) approval options will remain available on all submissions.
- Email notifications to HR Supervisors for travel and aging-report notifications will continued.
- Configuration updates and testing will be led by the PSC.

Campus Actions

Campus preparation will be critical before go-live.

Required pre-work

- Review and update Fiscal Staff assignments in FIN: How to Pull Fiscal Staff Assignments [3]
- To review existing AOs, please access the PSC Commercial Cardholder Dashboard. Instructions for accessing this dashboard are found on the Procurement Tableau Dashboard [4] website.
- Prepare department employees for changes to approver roles.

Fiscal Staff assignments must be fully reviewed and updated as needed before go-live.

For additional information on Fiscal Staff updates and related processes, please contact your Campus Controller's office. https://www.cu.edu/controller/campus-controllers-finance-offices [5]

1. CU Anschutz/Denver: fs-compliance@ucdenver.edu [6]
2. CU Boulder: fiscalcompliance@colorado.edu [7]
3. UCCS: Acctfinc@uccs.edu [8]
4. CU System Office: nora.sandoval@cu.edu [9]

Training Requirements

Ahead of go-live in the Summer of 2027, training will be required for **new and continuing approvers**.

Fiscal Staff designated as approvers will have these training requirements:

1. Procurement Card Cardholder
2. Travel and Travel Card
3. Procurement Fundamentals
4. IT Procurement
5. New Course in Development - Expense System Approver course

Any courses not completed since September 2024 will need to be retaken.

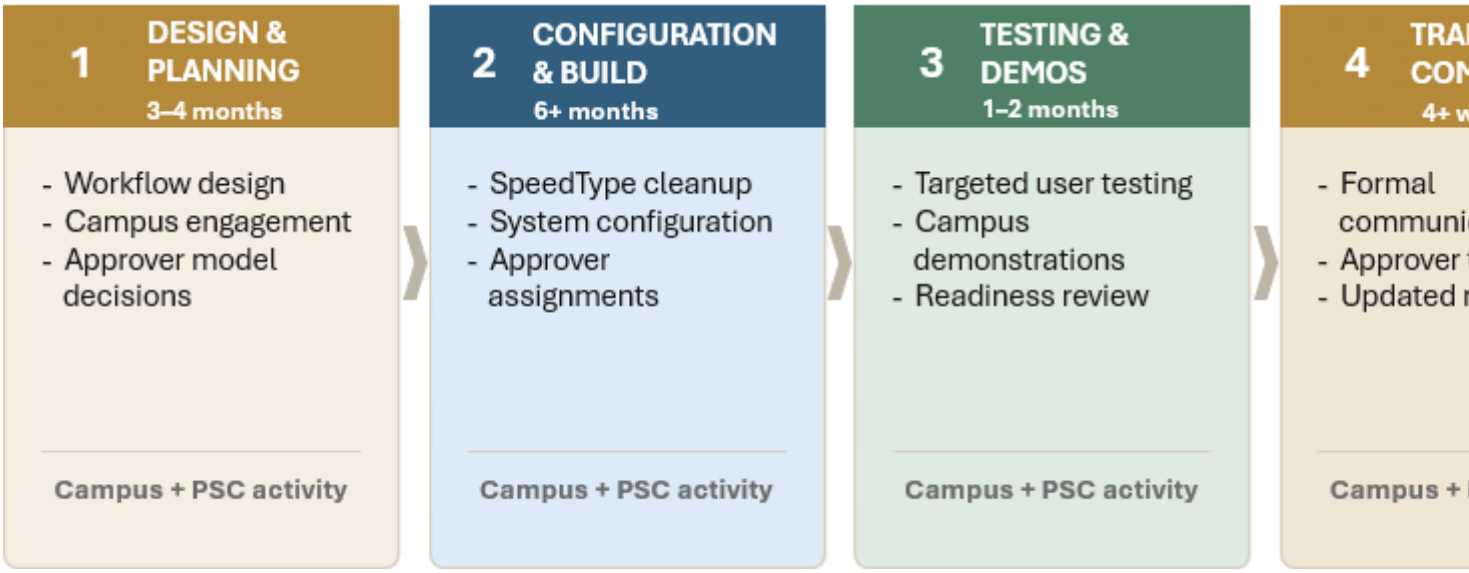
There is no change to Procurement Cardholder or Travel Cardholder training requirements, however beginning in 2027 all cardholders will be required to complete their required card program training once every three years for as long as they maintain a card account.

The existing Approving Official Training course will be eliminated, with applicable content being absorbed into the new Expense System Approver course.

Resources

Coming in 2027- Please check back then for Webinars, Office hours (Q&A), and Knowledge base articles.

Implementation at a Glance



Groups audience:
Procurement Service Center

Source URL:https://www.cu.edu/psc/concur-approver-change-project

Links
[1] https://www.cu.edu/psc/concur-approver-change-project [2] https://www.cu.edu/doc/october-town-hall-concur-approver-changepdf [3] https://pschelp.cu.edu/s/article/How-to-pull-fiscal-staff-assignments [4] https://www.cu.edu/psc/about-us/psc-metrics/procurement-tableau-dashboards [5] https://www.cu.edu/controller/campus-controllers-finance-offices [6] mailto:fs-compliance@ucdenver.edu [7] mailto:fiscalcompliance@colorado.edu [8] mailto:Acctfinc@uccs.edu [9] mailto:nora.sandoval@cu.edu