MOREHOUSE SCHOOL OF MEDICINE

EXECUTIVE MANUAL

Release 1.0 November- 2015
# TABLE OF CONTENTS

## REQUEST
- Request, defined ........................................................................................................ 2
- Role .................................................................................................................................. 2
  - Default Approver ........................................................................................................... 2
  - International Approver ................................................................................................. 2
- Events ............................................................................................................................. 2
- How to Approve Requests ............................................................................................. 2

## EXPENSE
- Expense, defined .......................................................................................................... 5
- Role ................................................................................................................................. 5
  - Default Approver ........................................................................................................... 5
  - Cost Object Approver .................................................................................................. 5
- Events ............................................................................................................................. 5
- How to Approve Expense Reports ................................................................................ 5

## DELEGATES
- How to assign delegates .............................................................................................. 9

## CONCUR MOBILE
- Mobile Registration ..................................................................................................... 11
- Mobile Approval for Expense Reports ......................................................................... 13
- Mobile Approval for Requests ...................................................................................... 14
REQUEST

Defined

In Concur, all Employees and Students must submit a formal request to their Default Approver before they are allowed to travel. The Request includes estimated amounts of travel.

Role

The Default Approver (DA) is required to approve all Requests in their approval queue. The Default Approver is the Supervisor that is configured based on the Human Resources data listed in Banner.

The (IA) International Approver (President's Office) is responsible for approving all Requests for International Travel after the Default Approver approves it. The International Travel Form must be attached before the user can submit the Request.

Events

You will receive a Request in your approval queue if the following events take place:

- Your direct report is requesting to travel domestically (DA)
- Your direct report is requesting to travel internationally (IA)
- Your direct report is requesting a cash advance only (DA)
- Your direct report is requesting travel for an MSM Guest (DA)
- Approval Timed Out (If your direct report does not approve their direct report’s Request within 5 days, the Request will be re-routed to you) (DA)

How to Approve Requests

1. Log in to Concur (www.concursolutions.com)
2. Click the Approvals tab
3. Click the **Requests** tab, then click the Request that requires approval.

4. The Request information will be displayed.

5. View the Attachments by clicking **Attachments** and **Check Documents**.
6. Verify the information that has been submitted then hit **Approve**.

7. If the proper documentation is not attached or you want to deny the Employee’s or Student’s Request to travel, hit **Send Back Request**.

8. If you want another person to view the Request after you approve it, hit **Approve & Forward**. Type the last name of the person you want to send the Request to then click **Approve**.
**EXPENSE**

**Defined**

The Expense tab is used to reconcile all Concur expenses. The Expense Report includes amounts of actual transactions.

**Role**

The **Default Approver (DA)** is required to approve all expense reimbursements and P-Card transactions in their approval queue. The Default Approver is the Supervisor that is configured based on the Human Resources data listed in Banner.

The **Cost Object Approver (COA)** is required to approve all Expense Reports that have been allocated to their department’s Organization code that is defined in the FOAP.

**Events**

You will receive an Expense Report in your approval queue if the following events take place:

- The actual amount of your direct report’s Expense Report is more 10% more than the travel Request they submitted to you *(DA)*
- Your direct report is requesting an expense reimbursement for non-travel related items they have purchased on behalf of MSM *(DA)*
- Your direct report has reconciled their P-Card expenses *(DA)*
- The Expense Report has expenses that have been allocated to your Department’s Organization code *(COA)*
- Approval Timed Out (If your direct report does not approve their direct report’s Expense Report within 5 days, the Request will be re-routed to you) *(DA)*

**How to Approve Requests**

1. Log in to [www.concursolutions.com](http://www.concursolutions.com)
2. Click the **Approvals** tab
3. Click the **Expense Reports** tab, then click the Expense that requires approval.

4. When you click on an expense, additional information will be shown on the right hand side.
5. Review the **Details of the Report Header**

- All of the general information from the **Report Header** will appear.

6. If all of the information submitted is for valid business expenses, click **Approve**.
7. If the report does not include valid business expenses or there is not enough money in the FOAP chosen, click **Send Back to User**. Provide a comment to explain why you are returning the report then click **OK**.
DECISIONS

Delegates

All Default Approvers, International Approvers and Cost Object Approvers have the authority to delegate their roles to another full time MSM employee. Approvers can allow another employee to Submit Requests, Book Travel, Submit Expense Reports and/or Approve on their behalf. You can set up your own delegates by following the steps listed below or you can contact the concurhelpdesk@msm.edu and a Concur Representative can set up the delegates on your behalf.

How to assign Delegates

1. Log in to www.concursolutions.com
2. Click Profile
3. Click Profile Settings
4. Click Expense Delegates
5. Click Add.
6. Begin typing the name of the person you would like to delegate for you. When their name pops up, click the person’s name. Then click **Add**.

7. Checkmark which functions should be permitted by the delegate and then click **Save**. By clicking the appropriate check mark, you can allow an MSM employee to request and/or approve travel on your behalf.
Concur Mobile

You can decide to perform all of your approval functions using your mobile device. Please visit https://implementation.concursolutions.com/expense/client/view_training.asp for video demonstration of the Concur Mobile app using iPhone, Blackberry and/or Android.

Mobile Registration

1. Click Profile
2. Click Profile Settings
3. Click Mobile Registration

4. Review your log in credentials (Hint: The same Log in information that you use when you log onto www.concursolutions.com will be the same info you use for the mobile app)
5. An email will be sent to you with instruction on how to download the Concur App. Instructions on how to use Concur Mobile will be further explained in the Concur Travel and Concur Expense sections.
How to approve Expense Reports using your mobile device

Use Approvals on the home screen to view and approve expense reports (if you are a report approver).

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap to open the desired expense report.
3) On the Report screen:
   - View the report details (receipts, expenses, etc.).
   - Tap Approve or Send Back.
   NOTE: If you tap Send Back, you must provide a comment.
How to approve Requests using your mobile device

Use Approvals on the home screen to view and approve requests (if you are a request approver).

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap Travel Requests.
3) Tap to open the desired request.
4) On the Requests screen:
   • View the request details (segments, expected expenses, etc.).
   • Tap Approve or Send Back.
   NOTE: If you send back, you must provide a comment.

1) On the home screen, tap Approvals.
2) On the Approvals screen, tap Invoice Approval.
3) On the Invoice screen, tap Invoice Approval.
4) On the next screen, tap to open the desired payment request.
5) On the Invoice screen:
   • View the request details (summary, images, vendor info, etc.).
   • Tap Approve or Send Back.
   NOTE: If you send back, you must provide a comment.