MOREHOUSE SCHOOL OF MEDICINE

EXECUTIVE MANUAL

Release 1.0 November- 2015



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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 <u>International Travel Form</u> 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 (<u>www.concursolutions.com</u>)
- 2. Click the **Approvals** tab



3. Click the **Requests** tab, then click the Request that requires approval.

C. CONCUR Travel Ex	pense Approvals Ap	p Center			Help Profile 👻 🖉
Approvals Home Requests	Reports				
Approvals					
00 01 Trips Requests	00 Expense Reports				
Requests					
Approve					
Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Executive Manual	33VU	Concur, Test	12/04/2015 12/11/2015	11/30/2015	\$480.00

4. The Request information will be displayed.

	C. CONCUR Travel Expense	Approvals App Cer	iter		P	Help + rofile - 👤
Request/Trip Additional Ir Request Heade	Approvalis Home Requests Report est 33VU (Concur, Tent) p Name: Executive Manual information: v Segments Expense Summary Approval Fine Audit Teal	8			Abachmente * Print / Linuel * Se	d Back Becuss: Approve & Forward Status: Pending Supervisor Approv Amount: \$480.0
ute 2/04/2015	Expense Type Per Dem	4 Amount Requested 5450.00 5450.00	Expense Type Per Dem Report/Trip Purpose	Trip Start Date 12/04/2015 Destination Oby	Trip End Date 12/11/2015 Trip Type	
			Description Approved Amount #00.00	Transactos Anountyp	Commont	
	TOTAL AND STATES	OUNT TOTAL REQUESTED				200

5. View the Attachments by clicking **Attachments** and **Check Documents**.

Approve & Forwar	Approve	Send Back Request	Print / Email 🔻	Attachments •
Supervisor Approva	is: Pending	Statu	ments	Check Docur
Amount: \$480.0			ments	Attach Docu

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**.

end Back Request	Approve	Approve & Forward					
Status: Pending Supervisor Approval							
		Amount: \$480.00					
	Stat	Status: Pending					

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**.

	Attachments •	Print / Email 🔻	Send Back Request	Approve	Approve & Forward
			Statu	s: Pending	Supervisor Approval Amount: \$480.00
F	Request/Trip Name: Executive Manua	al			

Additional Inf	ormation:					
Request Header	Segments	Expense Summary	Approval Flow	Audit Trail		
					Supervisor Approval:	
					Concur, Approver	
				-		
					liser-Added Approver	
			6		User-Added Approver:	0 0 ×
			(User-Added Approver: con Concur, Approver (concurapprover@msm.edu)	• ×
			<	<	User-Added Approver: con Concur Approver (concurapprover@msm.edu) Hase D: concurapprover Loops (Concurapprover)	• ×
			<		User-Added Approver: con Concur, Approver (concurapprover@msm.edu) User D. concurapprover Logon D: concurapprover Logon D: concurapprover @msm.edu	o ×
			(User-Added Approver: con Concur, Approver (concurspprover@msm.edu) User D. concurspprover Logon D: concurspprover Search Approvers By	© ×
			C		User-Added Approver: con Concur, Approver (concurapprover@msm.edu) User D. concurapprover Logon D: concurapprover Eserch Approvers By	9 ×
			C		User-Added Approver: con Concur, Approver (concurapprover@msm.edu) Hear D: concurapprover Logon D: concurapprover gamainteou Search Approvers By	*

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 nontravel 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 <u>www.concursolutions.com</u>
- 2. Click the **Approvals** tab

	Travel	Expense	Approvals	App Center	
Ello, Appro	OF MEDIC	SE NE			

3. Click the **Expense Reports** tab, then click the Expense that requires approval.

C. CONCUR Travel Ex	pense Approvals App Ce	nter			Helj Profile 👻
Approvals Home Requests	Reports				
Approvals					
00 Trips 01 Requests	DO Expense Reports				
Requests					
Approve					
Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Executive Manual	33VU	Concur, Test	12/04/2015 12/11/2015	11/30/2015	\$480.0

4. When you click on an expense, additional information will be shown on the right hand side.

C CONCUR Expense Approvals Reporting - App Center		Holp -
		Profile - 👱
Approvals Home Requests Reports		
Dawn test Approver Amt (Traveler1, Morehouse)		Send Back to User Approve Approve & Forward
Summary Details • Receipts • Print / Email •		Hide Exceptions
Exceptions Cate Amount Exception Car Renal 11/03/2015 \$300.00 MSM pole y requires the use of the Concur booking system for Air, Car, and H	totel reservations.	×
Expenses	View • . «C	Expense Receipt Image
A C 11/03/2015 Car Rental Enterprise test Tucson, Arizona Cast	S300.00 S300.00	Expense Type Car Rental
MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.		Transaction Date
		Report/Trip Purpose
		Trip Type
		In-State Additional Information
		test Vendor
		Enterprine y
		Tucson, Arizona
		Payment Type Cash
		Amount USD
		Reviewed
		Approved Amount
	TOTAL AMOUNT TOTAL REQUESTED	attach Receipt
	\$300.00 \$300.00	

5. Review the **Details** of the **Report Header**



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

Policy	Report/Trip Name	Trip Start Date	Trip End Date	
*Travel & Expense Policy 🗸	Dawn test Approver Amt	11/03/2015	11/05/2015	
Report/Trip Purpose No	Trip Type	Traveler Type	Vendor ID	
Meeting	In-State	Faculty/Staff		
		-	-	
Chart	Fund	Org	Program	
1) Morehouse School of Medicine	(123011) Fam Prac Res Graduation	(230001) Family Medicine	(10) Instruction Programs	
ctivity	Additional Information	Report Id	Report Key	
	test	5D50B96E870F4DA4AF9F	534	
omment	User Name	Report Date	Report Currency	
	Traveler1, Morehouse	10/30/2015	US, Dollar	
teceipts Received	Submit Date	Approval Status	Payment Status	
Yes	10/30/2015	Pending Supervisor Approval	Not Paid	
leport Total	Personal Expenses	Amount Not Approved	Amount Approved	
300.00	0.00	0.00	300.00	
mount School Paid	Amount Due School	Amount Due User	Amount Due School Card	
0.00	0.00	300.00	0.00	
otal Amount Claimed				
300.00				
Authorization Requests				
Request Name	Request ID	Request Total	Amount Approved Amount Re	emaining

6. If all of the information submitted is for valid business expenses, click **Approve.**

Help 🛨
Profile 👻 💄
Send Back to User Approve & Forward
Hide Exceptions
~

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**.

Prof	Help 🗸 île 👻 💄
Send Back to User	Approve & Forward
	Hide Exceptions

Send Back Report	×
Comment History	
e	
T	
Add a comment to explain why you are returning the report. Then click OK to return the report to the employed	ee.
Comment	
ок с	ancel

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 <u>concurhelpdesk@msm.edu</u> 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.

Requ	iest Dele	egates			
Delegates	Delegate For	-			
Add	ave Delete				
Delegates are Expense and F	employees who are allowe lequest share delegates. I	ed to perform work on behalf of other By assigning permissions to a delegat	employees. te, you are assigning permissions for Expe	ense and Request.	
Delegates are Expense and F	employees who are allowe Request share delegates. I Can Prepare	ed to perform work on behalf of other By assigning permissions to a delegat Can Submit Reports	employees. te, you are assigning permissions for Expr Can Submit Requests	ense and Request. Can View Receipts	Receives Emai
Delegates are Expense and P	employees who are allowe lequest share delegates. I Can Prepare	ed to perform work on behalf of other By assigning permissions to a delegal Can Submit Reports	employees. te, you are assigning permissions for Expr Can Submit Requests No records found.	ense and Request. Can View Receipts	Receives Emai
Delegates are Expense and f	employees who are allowe lequest share delegates. I Can Prepare	d to perform work on behalf of other o By assigning permissions to a delegat Can Submit Reports	employees. le, you are assigning permissions for Expe Can Submit Requests No records found.	ense and Request. Can View Receipts	Receives Emai

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**.

Request Delegates	5			
Delegates Delegate For				
Add Save Delete				
Delegates are employees who are allowed to perform wor Search by employee name, email address, employee id Ree <mark>d, James</mark> Reed, James F jreed@msm.edu	k on behalf of other e or legon id Add Ca	mployees. Indel e, you are assigning permissions for Exp	ense and Request.	
User ID: M00025856 Logon ID: jreed@msm.edu	ports	Can Submit Requests	Can View Receipts	Receives Emails
Reese, Crystal creese@msm.edu User ID: M0045461 Logon ID: creese@msm.edu		No records found.		
Reese, LeRoy Ireese@msm.edu User ID: M00026088 Logon ID: Ireese@msm.edu				
Reeves, Takisha treeves@msm.edu User ID: M00046036 Logon ID: treeves@msm.edu				

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.

Deleg Exper	ates are employees wi nse and Request share	ho are allow delegates.	ed to perform wor By assigning per	k on behalf of other missions to a delega	employees. ite, you are assig	ning permission	s for Expense	e and Request.		
	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approva Emails
	Traveler, Concur traveler@msm.edu	•			۲				×	
	Traveler2, Morehouse traveler2@msm.edu									V

DECISIONS

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.a sp 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).



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).

