Concur for Manager Approvers

Manager Approvers

Concur Approvers have additional access to review and approve Expense Reports. Approvers can view each detail of the report, review attached receipts then accept or reject the Expense Items.

Initial Setup

There is no setup on your part! The data from Lawson determines the manager structure for Concur.

Your Account

On your account, you will notice an option under your Expense tab that gives you quick access to reports that are waiting for your approval.



The My Concur page has a separate Queue section for Expense Report waiting for your approval. This is in addition to your own Expense Reports.

Report Name	Status Payment Status	Report Date	Requested Amount
	No re	ecords found.	
	800		
Approval Queue (2) Report Name	Employee	Report Date_	Requested Amou
TEST - Training Training	TestUser, TestUser	10/31/2011	USD 72.
<u>meal limit test</u> daily meal limits	TestUser, TestUser	10/28/2011	USD 73.



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Reviewing an Expense Report

Notifications

You will receive notification of an Expense Report in your queue via email. The message provides a link to the Concur website.





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Approval Process

After selecting a report to review, the screen will let you access the details of the report.

Details 🗸	Dessists D1	4						3)	
- Details -	Receipts - Prir	nt 🗸							
Expenses					/ • «	Expense 3			
0	Transaction Da 10/19/2011	_	Vendor Name Silver Spoon	Business Purp	City	c. Dinner		Transaction Date	
() ()	10/19/2011	c. Dinner 2 Parking	Airport Garage		Denver	Business Purpose		Vendor Name	
> Ø	10/19/2011	c. Dinner	McDonalds		Denver			Silver Spoon	
4						City Denver, Colorado		Payment Type Cash/Personal Credi	it Card 💌
-						Amount	[Personal Expense	e (do not reimburs
						22.31 USD ¥		Reviewed	v
						Approved Amount		Comment	
						22.31	5		
						Region (Future Use) Region Future Use		Division (FLACS) Florida Hosp	nital Medicine Serv
						Accounting Units	-	(i EAGS) FIONDE FIOS	pital medicine Serv
						(13924) Neighborhood Health P	lan - Fł		
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	-			report nan	ne and	the employee w	ho sul	bmitted th	e report
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When you accept the Expense Report, you will receive one final confirmation. Once you Accept on the confirmation, you cannot "undo" the report Approval.

Final Confirmation	×
Approver Review Confirmation	
Approval Attestation:	
Approval signifies that all expenditures are business related, have been reviewed and are within Tean reimbursement policy guidelines.	nHealth

Report Details

To view more information about a pending or approved report, open a report and select the Details button.

Expense Center - TestApprove



Report Header – shows the main dates and purpose of the report as entered by the Employee

Totals – shows a summary of the reimbursable amounts

Audit Trail – Shows the actions and change of status over the life of the report

Approval Flow – shows the trail of approvers (if there was more than one)

Comments – shows all comments from the Employee and Approver



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Your Reports

By default, the Approval Reports screen only shows reports Pending your Approval.

To see reports that you have already approved, go to the Approver Reports tab, then select the option from the View button:

Reports Pending your Approval	Name
Reports you Approved this Month	rahing
Reports you Approved last Month	
Reports you Approved this Quarter	nit test al imits
Reports you Approved last Quarter	
Reports you Approved this Year	
Reports you Approved last Year	



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Approval Reassignment

When you go on PTO, you will need to temporarily assign another Approver in your place.

- 1. Go to your Profile page
- 2. Select Expense Delegate
- 3. Choose a manager from the Employee search

My Concur Travel Expens	Profile Help Log Out
Personal Information Change Pa	assword System Settings Mobile Registration Travel Vacation Reassignment
My Profile	Expense Delegates
Your Information	Expense Delegates
Personal Information	Add Delegate 🖹 Save 😑 Delete
Company Information	Delegates are employees who are allowed to perform work on behalf of other employees.
Contact Information	
Emergency Contact Credit Cards	earch by employee name, email address, employee id or logon id TestProcessor@teamheath.com - TestProcessor TestProcess Add Cancel
Credit Cards	TestProcessor@teamhealth.com - TestProcessorTi
Travel Settings	TestProcessor@teamhealth.com TestProcessor@te
Travel Preferences	
International Travel	TestUser, lestUser v v v
Frequent-Traveler Programs	
Assistants/Arrange s	
Expense Settings	
Expense Information Expense Delegates	
Expense Preterences	
Expense Approvers	
Favorite Attendees	

4. Enter the appropriate dates and permission levels for that Approver

Name	Can Prepare	Can Submit	Can View Receipts	Receives Emails	Can Approve	Can Approve Tempo	orary Receives Approval Emails
TestProcessor, TestProcessor TestProcessor@teamhealth.com							
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