



Manager Approvers

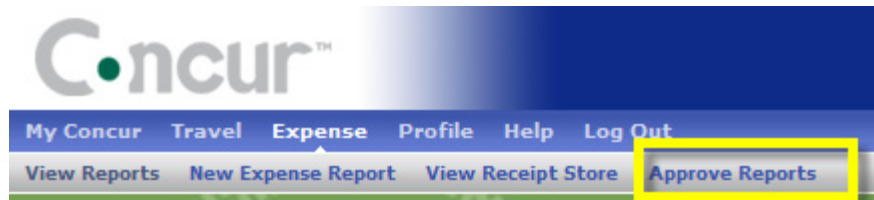
Concur Approvers have additional access to review and approve Expense Reports. Approvers can view each detail of the report, review attached receipts then accept or reject the Expense Items.

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.

Expense Reports (0)				
New Expense Report		View Reports		
Report Name	Status	Payment Status	Report Date	Requested Amount
No records found.				
Approval Queue (2)				
Report Name	Employee	Report Date		Requested Amount
TEST - Training Training	TestUser, TestUser	10/31/2011		USD 72.31
meal limit test daily meal limits	TestUser, TestUser	10/28/2011		USD 73.00



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.

From: AutoNotification@concur.com [mailto:AutoNotification@concur.com]
Sent: Thursday, October 27, 2011 12:10 PM
To: Tiffany Massengill
Subject: Expense Report Pending Your Approval

Concur™

You have a report pending your approval.

Report From	JEANNE GRIFFIN
Report Name	BD Meeting Nashville
Report Purpose	CRM Training for BDVPs - CRM Lead Form and Checklist
Requested Amount	USD

Link To Expense
<http://www.concursolutions.com>

Make your life easier with Concur's mobile solution.
This is what smartphones were made for.

Approval Process

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

Expense Center - TestApprover Testy TestApprover

TEST - Training [TestUser, TestUser] Send Back to Employee Approve Approve & Forward

Details Receptions Print

Expenses	Transaction Da...	Expense Type	Vendor Name	Business Purp...	City
	10/19/2011	c. Dinner	Silver Spoon		Denver
	10/19/2011	Parking	Airport Garage		Denver
	10/19/2011	c. Dinner	McDonalds		Denver

Expense

Expense Type: c. Dinner Transaction Date: 10/19/2011

Business Purpose: Vendor Name: Silver Spoon

City: Denver, Colorado Payment Type: Cash/Personal Credit Card

Amount: 22.31 USD Personal Expense (do not reimburse):

Reviewed: No

Approved Amount: 22.31 Comment:

Region: (Future Use) Region Future Use Division: (FLACS) Florida Hospital Medicine Serv

Accounting Units: (13924) Neighborhood Health Plan - FI

1. The top of the report identifies the report name and the employee who submitted the report
2. The list of expense items
3. Select an item to see the details to the right
4. If an item has this arrow, it indicates an itemization
5. The Comment box allows you to add explanation or commentary to the line item.
6. The choices for the Approval process
 - a. **Send Back to Employee** – requires a Comment
 - b. **Approve** – finished the process
 - c. **Approve & Forward** – Allows you to send on to another approver that you choose from a drop down menu.

TIP: To view all receipts at one time, select the Receipts button and choose View Receipts in New Window

meal limit test [TestUser, TestUser]

Details Receptions Print

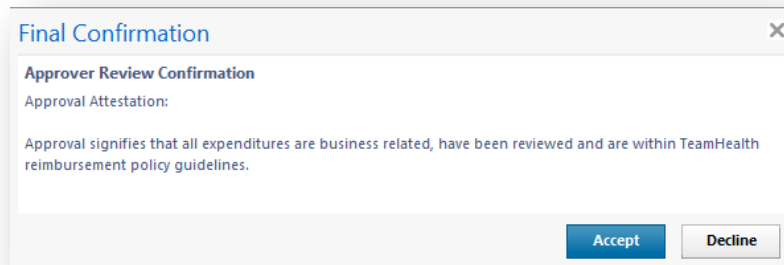
Expenses

- Receipts Required
- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images

10/13/2011 c. Dinner hilton

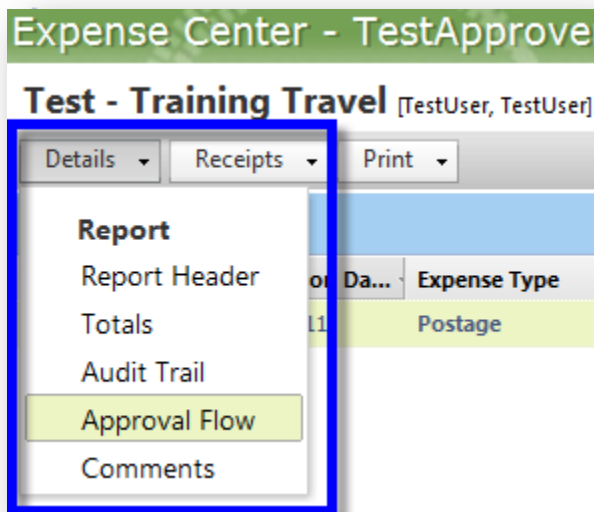


When you accept the Expense Report, you will receive one final confirmation. Once you Accept on the confirmation, you cannot “undo” the report Approval.



Report Details

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



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)

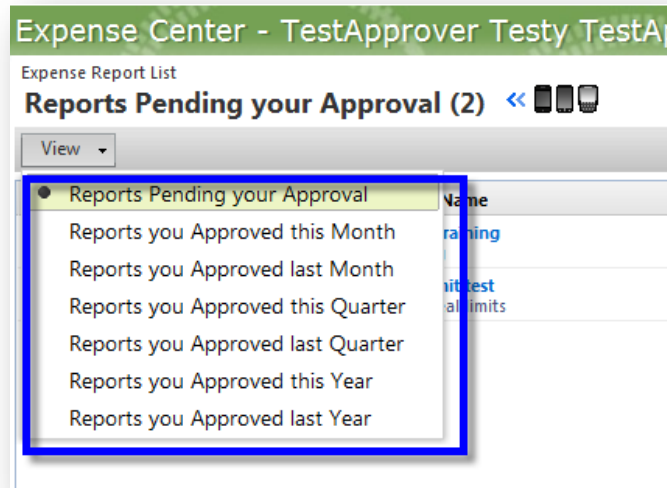
Comments – shows all comments from the Employee and Approver



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:





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

Name	Can Prepare	Can Submit	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
TestProcessor, TestProcessor TestProcessor@teamhealth.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 Temporary	Receives Approval Emails
TestProcessor, TestProcessor TestProcessor@teamhealth.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>