

# Concur Update

# Concur Updates

## Automated Supervisor Updates

- Supervisor changes in HR are now automatically sent to Concur.
- No need to request supervisor changes from the **Controller's Office**.

## Daily Employee Imports

- New active employees and graduate students are now loaded into Concur **daily**.
- This update streamlines access for new personnel and ensures data accuracy.

## Grants Approval Process

- Request Approval:
  - DRA replaces ORSP
- Expense Reports: There is an additional approval step in the Grants Approval workflow for expenses starting December 2, 2024.

Step 1: DRA approval (using [ORSP.DRA@umb.edu](mailto:ORSP.DRA@umb.edu)).

Step 2: ORSP approval.

# Finance Systems Access Management

Controller's Office

# Finance Systems Access Management

## ➤ Drivers of System Access

- Signature Authorization Form
- CON-15 Access Request Form

## ➤ Systems - PeopleSoft, BuyWays, Summit & Concur

### ➤ Row Level Security (Department)

- PeopleSoft
  - Summit
  - Concur
- ### ➤ BuyWays
- Full access

# BuyWays Access

## University of Massachusetts Boston Signature Authorization Form Fiscal Year 2025

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Dept ID	B003800000	Dept Description:	Controller's Office	Dept Manager/ Authorized Signer:	<u>Overko, Patricia M.</u>
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The following individuals are authorized to approve financial transactions for this department's budgeted funds. These individuals must comply with fiscal policies and procedures, including but not limited to Business Travel & Expense, University Procurement, Inventory Control, and others as defined by the University and Campus. In addition to this approval, internally funded awards, external grants and contracts, and endowment fund allocations are subject to the Office of Graduate Studies, Office of Research and Sponsored Programs, and University Advancement's Signature Authorization processes, respectively.

Departmental Access level only	
Additional Authorized Signer-1 Name	Additional Authorized Signer-1 Signature
Additional Authorized Signer-2 Name	Additional Authorized Signer-2 Signature
Additional Authorized Signer-3 Name	Additional Authorized Signer-3 Signature

The Department Property Custodian (DPC) is a department manager designee to serve as a liaison to the Property Division, coordinate inventories, and ensure compliance with inventory mandate. Where there is not a designee, the Department Manager fills this role.

Overko, Patricia	_____	_____	_____
Department Property Custodian (DPC) Name	Department Property Custodian (DPC) Signature	Date	

The Cost Object Approver (COA) is responsible for approving expense reports in Concur. If a designee is assigned, the approval responsibility lies solely with the COA and not with the Department Manager. If not designee is assigned, the Department Manager assumes this role.

_____	_____	_____
Cost Object Approver (COA) Name	Cost Object Approver (COA) Signature	Date

Signatures authorizing a department's legal obligations, contracts, payments, payroll and other fiscal transactions shall be interpreted as certification that the document upon which the signature appears, and any attachments, are accurate and complete and comply with all applicable general and special laws, regulations and policies.

Campus Wide Access		
<u>Overko, Patricia M.</u>	_____	_____
Department Manager Name	Department Manger Signature	Date
Giuliani, Chris	_____	_____
Associate Vice Chancellor Name (Non-Academic Depts)	Associate Vice Chancellor Signature	Date
Kirleis, Kathleen	_____	_____
Dean/Provost or Vice Chancellor Name	Dean/Provost or Vice Chancellor Signature	Date

\*\*\* Employee Only Access granted to individuals who only have BuyWays access (i.e. no PeopleSoft and Summit access to financial information.