

Upcoming Leave or Vacancy?

Use this checklist to ensure continuity within your unit

Concur (Expense)

Before any leave or vacancy begins:

- ☐ Set up an Expense Approval delegate
- ☐ Set up a Preparer delegate
- ☐ Submit any open Expense reports

Ensure your department has:

- ☐ A Chart of Accounts approver
- ☐ An Expense Approver
- ☐ An Expense Preparer

People can hold multiple roles, but all roles must be shared amongst at least two people for coverage.

Aurora

Before any leave or vacancy begins:

- ☐ Ensure there is an department Action Initiator
- ☐ Ensure there is an department Action Approver
- ☐ Confirm departing staff's access, and mirror if necessary

PeopleSoft

Before any leave or vacancy begins:

- ☐ Generate list of departmental Time & Labor Groups

Ensure your department has:

- ☐ Staff trained on Student, LHT & Temp QuickHires
- ☐ Staff responsible for running Payroll Registers

Concur (PCard)

Before any leave or vacancy begins:

- ☐ Set up an Expense Approval delegate
- ☐ Set up a Preparer delegate
- ☐ Submit any unreconciled transactions
- ☐ Determine a process for any recurring charges

Ensure your department has:

- ☐ A Chart of Accounts approver
- ☐ An Expense Approver

Buy2Pay

Before any leave or vacancy begins:

- ☐ Complete and submit out any outstanding requisitions

Ensure your department has:

- ☐ An active Department Requestor
- ☐ An active Supplier Portal user
- ☐ Approvers at all appropriate levels

Resources

- **Concur Knowledge Center**
 - travel.harvard.edu/concur-training
- **Buy2Pay Training Center**
 - b2p.procurement.harvard.edu/buy-pay-project
- **Aurora Knowledge Center**
 - about.aurora.fas.harvard.edu/knowledge-center
- **System Access Request Forms**
 - finance.fas.harvard.edu/form-categories-if-applicable/access-request-forms

Contact the Admin Ops/ASAP team for assistance, at
fasasap@fas.harvard.edu

If your vacancy is sudden, or cannot be covered by the remaining staff in your department/team, contact Admin Ops fasasap@fas.harvard.edu as soon as possible to discuss coverage.



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