RowanUniversity
INFORMATION RESOURCES & TECHNOLOGY

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go.rowan.edu/APTravelPolicy
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asktravel@rowan.edu

REQUEST APPROVERS

MAY 2020   **CONCUR**

REQUEST APPROVAL PROCESS

- All Requests will go through an automated workflow process once submitted.
- Each approver in the approval flow will review the Request to verify the business trip is necessary, reasonable, appropriate, allowable and in compliance before approving.
- Approvers will receive an email notification, including the login link to Concur, that Requests are pending approval.
- Approvers may perform the following to a Request; change amounts on expense types, add approvers, approve, approve & forward and send the Request back to the traveler for adjustments.
- Requests may be sent back to the traveler for incompleteness, lack of compliance or missing supporting documentation. If a Request is sent back to the traveler, it will go through the entire approval workflow again.
- If the Approver does not approve a Request within 7 days, they will receive an email notification every day until the condition is met.
- All approvers must review and approve the Requests before travel can be booked.

WHO IS AN APPROVER?

- **Default Approver 1** – Department Head
- **Default Approver 2** – Division Head
- **Export Control Approver** - Export Control Officer
- **Ethics Approver** – Ethics Liaison Officer
- **Cost Object Approver** - A budget owner of a FOAPAL

APPROVER TIPS

- You will have one login for your own request and pending approvals.
- Timely approval is required to ensure prices are similar to the estimated expenses entered in a Request.
- Approvers have the ability to grant approval permissions to delegates.
- Review the Request Header, Segments, Expense Summary, Approval Flow, Audit Trail, Exceptions, Icons and attachments before approving.
- All requests should include one or more of the following attachments: brochure, conference agenda, event agenda, meeting invite,etc.

Deadlines:
- Requests must be approved 4 weeks prior to departure.
- Request Approval is due upon receipt. However, if not approved within 7 days you will receive daily email notifications.

APPROVER RESPONSIBILITIES

The approver should review and ensure that:

- Fiscal control and fiduciary responsibilities are maintained when committing university funds.
- All Requests and estimated expenses are ordinary, reasonable, not extravagant, necessary, and supported by a trip purpose.
- The traveler is performing official university business, exercising care when planning travel and verifying expenses are planned in the best interest of the university to minimize travel expenses.
- Each Request meets the rules and regulations of the State Ethics Commission.
- Compliance with the US Export Control laws and regulations. The proper export control forms and training is completed before the traveler can be approved in Concur.
- All required supporting documentation is attached and coincides with the trip purpose on the Request.
- Timely approval is required to ensure prices are similar to the estimated expenses entered in a Request as well as availability of flights, hotels, etc.
- Approval indicates that the verification process is complete and that the Request is a valid Rowan expense or the trip is funded by an outside source.
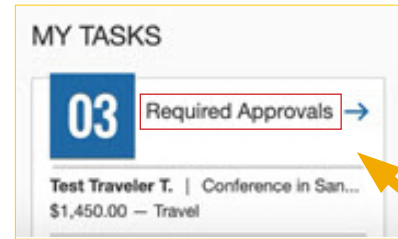
APPROVING A REQUEST

You will receive an email notification stating that you have a Request pending your approval, who the approval is for, and some information regarding the Request.

- Go to **go.rowan.edu/ConcurTravel**
- Enter your Rowan's single sign-on. Select **Login.**
- Complete Duo if prompted.

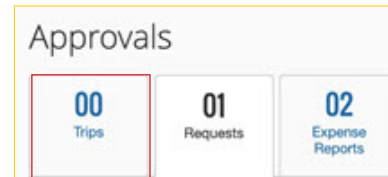In the **My Tasks** Section on the Concur home page, select **Required Approvals**.
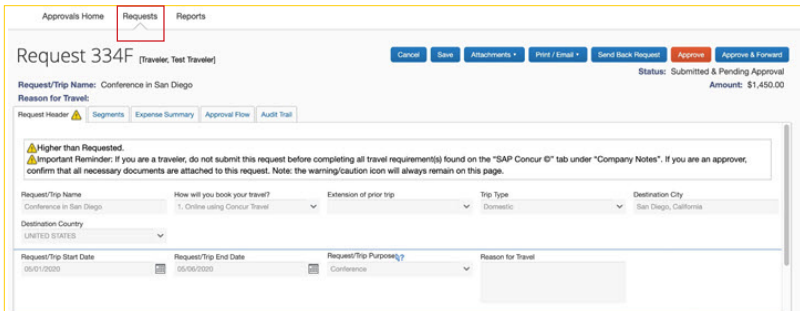
The **Approvals** page will appear.
You will see three tabs awaiting your approval, each tab will have a number indicating how many of each type you have to approve.
- Trips
- Requests
- Expense Reports

Select the **Requests** tab. Select the request you wish to review by selecting the **Request Name**.

REVIEW A REQUEST

- Select the **Request Header** tab. Review the Request Header to verify the trip type, destination city, time-frame, trip purpose, reason for travel, FOAPAL being charged and comments from the traveler.
- Review the exceptions and icons for description and approval.
- Select the **Segments** tab to review airfare, car rental, hotel reservation, or railway ticket information.
- Select **Expense Summary** tab to review other estimated expenses, policy compliance and allocation requested by the traveler.
- Check that the appropriate documents have been attached by selecting Attachments, then **View Documents** in new window.

APPROVAL OPTIONS & SUBMISSION

- Delegate Permissions
- Change expense type amounts
- Add comments
- Add additional approver
- Approve
- Approve & Forward
- Send Back Request
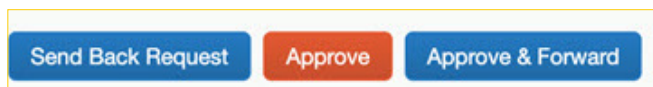
If you approve the Request, it will disappear from your **Request Pending** page and will go to the next approver in the workflow.

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ICONS

You may encounter the following icons while using Concur.

Icon	Name	Description
❗	Exception	Indicates that a request exception must be resolved before submission.
⚠️	Warning	Indicates that the request has an exception that does not prevent submission.
🏛️	Budget Item	Indicates that the item is allocated to a budget you manage and requires your budget approval.
✈️🚆🚗🛏️	Segments	Indicates the flight, train, car and hotel trip segments that the user can add to a request.
🥧	Allocation	Indicates that the expense entry has been allocated.
↺	Resubmitted Request	Indicates the traveler has resubmitted the Request to Approver