REQUEST APPROVERS

MAY 2020

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.
MAY 2020

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, timeframe, 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.
# ICONS
You may encounter the following icons while using Concur.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Exception</td>
<td>Indicates that a request exception must be resolved before submission.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Warning</td>
<td>Indicates that the request has an exception that does not prevent submission.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Budget Item</td>
<td>Indicates that the item is allocated to a budget you manage and requires your budget approval.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Segments</td>
<td>Indicates the flight, train, car and hotel trip segments that the user can add to a request.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Allocation</td>
<td>Indicates that the expense entry has been allocated.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Resubmitted Request</td>
<td>Indicates the traveler has resubmitted the Request to Approver</td>
</tr>
</tbody>
</table>