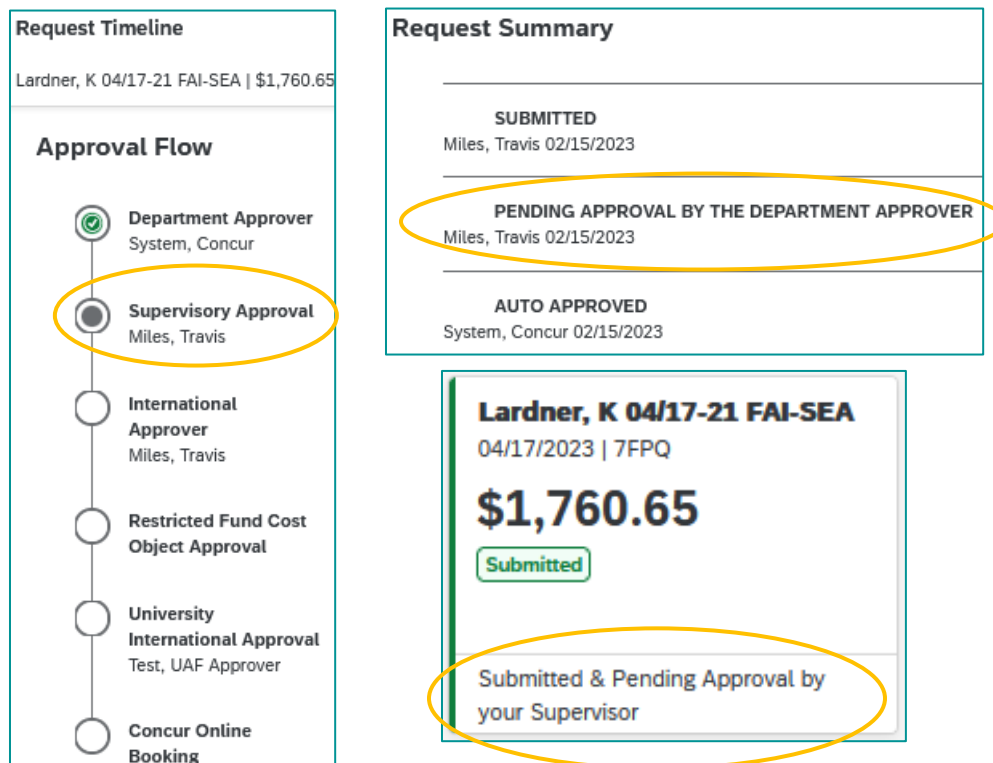


Request Dashboard

The Approval Flow documents the approval routing and user assigned to the approval step on a submitted Request. The Request Summary documents the timeline of when actions are completed and all comments added to the Request. The Request status is also documented on the tile of an Active Request. All components provide helpful information for troubleshooting.



Concur is programmed to apply regulatory approval requirements to the Request.
(R05.02.060(4))

- At least one authorized approver on each Request, except for self-approvers on domestic travel
 - Supervisor/Default Approver approval on travel paid with unrestricted funds
 - COA approval on travel paid with restricted funds
 - Supervisor/Default Approver approval on travel paid with restricted funds for which the traveler is the COA; Concur is programmed with a "skip-step" to reroute the Request
- Supervisor/Default Approver approval on all international Requests
- Optional Department Approver as assigned in the user's profile

The Default Approver for employees is their supervisor as listed in Banner form NEA2SPE. Employees without an assigned supervisor in Banner are manually profiled with their supervisor as the Default Approver. The Default Approver is changeable by the User Admin but reverts to the primary supervisor in Banner with the daily extract and file updates.



The Default Approver for non-employees is the authorized financial approver. This is assigned at profile creation and changeable by the User Admin.

The COA is the Researcher assigned to the restricted fund in Banner page FTMFUND. If the "Researcher" field is blank in FTMFUND, then the COA is the PI assigned in Banner page FRAGRNT. This is only changeable by updating the Researcher/PI in Banner.

The optional Department Approver is sometimes the department travel coordinator or financial manager. This is assigned, changed, or removed directly on the user's profile. Delegates are also able to assign, change, or remove the Department Approver.

Approval Status

There are several approval statuses available on the Request.

1. Auto Approved – This is a skip-step function that bypasses unnecessary, double, or unauthorized approvals
 - a. An example of unnecessary is the International Approver step for domestic travel
 - b. An example of double is the International Approver step when the Supervisory Approval step is already fulfilled
 - c. An example of unauthorized is COA approval when the traveler is the PI
2. Submitted & Pending Approval [by <approval step>] or Pending Cost Object Approval – The approval status is under the Request Name, and the assigned approver is in the Approval Flow
3. Concur/Pending Online Booking – The final approval step for Requests with "Travel Booking Tool" selected for "How will you book your travel?" in the Header
4. Approved – The Request Summary is timestamped with the date of approval and name of approver; this includes documenting the name of a delegate acting as a proxy approver
5. Sent Back to User – Request was returned by an approver or recalled by the traveler or delegate
6. Cancelled – Request was cancelled before or after approval

FAQ

Q: We added additional approvers to the Request when we filled it out. Concur skipped those added approvers and sent the Request straight to the default approver(s). Why?

A: Travelers and delegates cannot manipulate the Approval Flow on the Request or Report. Only the approvers in the Approval Flow or Processors can make changes once the Request or Report is submitted.

Concur is designed to allow UA employees to self-manage their travel from start to finish. Preventing the user who submits the Request from manipulating approvals helps ensure each trip is approved according to the travel regulations.

Q: We submitted the Request as a delegate and Concur skipped us as the department approver. Why?

A: The individual that submits the Request cannot also approve the Request. If you are an assigned approver and submit the Request, Concur bypasses your approval.

If you need to act as an approver for the Request, then the traveler or another delegate must submit the Request.

Q: Some employees have a joint appointment. How can we assign joint travel approvers?

A: The Default Approver for employees is always their primary supervisor (not timesheet approver) as listed in Banner form NEA2SPE. This is true for joint appointments, cross-campus, and cross-department travel as well.

When personnel in another department or campus needs to approve travel for an employee for which they are not the supervisor, they are added to the approval flow by one of the other approvers.

Audit Trail

Documents actions taken on a submitted Request including comments and approvals. Actions are timestamped and labeled with the associated user's name. Actions taken by delegates and proxies are recorded with that individual's name.

Audit Trail			
Slavik, J 10/20-10/25 SEA \$1,806.00			
Request Level			
Date/Time	Updated By	Action	Description
08/21/2022 4:28 PM	Miles, Travis	Field Edit	The field "ReceiptImageAvail" was changed from "N" to "Y"
08/21/2022 4:24 PM	Miles, Travis	Approval Status Change	Status changed from Submitted & Pending Approval by your Supervisor to Sent Back to User Comment: Per diem is not approve, please remove and resubmit

The audit trail provides helpful information for troubleshooting especially status changes. For example, this audit trail provides a timestamp of the approver's return and reasons for return.