Approving Requests (Pre-Trip Travel, Payment Card, Delegate Approver)

Audience: Approvers (i.e., supervisor, budget approver, fiscal officer, treasurer, assistant treasurer, VP, Dean)

Summary

1. **Pre-trip travel requests** are required for cash advance requests and for trips requiring exception **approval**. These types of requests may route for approval by the supervisor, budget approver, fiscal officer and/or VP/Dean depending on the type of request.

2. The request feature is also used for **new payment card application requests** and a variety of **payment card exception requests**, including:
   - Credit Limit Change Request (transaction amount, monthly limit)
   - Purchase Exception Requests (purchases outside of policy - eBay purchases, PayPal, gift card purchases, etc)

   The payment card requests will route to the designated approvers and then be transferred to the Global Payment Card team for review of business justifications and university compliance with the Global Payment Card Policy. When your request is verified as complete and compliant, it will automatically route to the Assistant Treasurer, Treasurer, and/or Procurement for final approval, depending on the type of request.

3. **Delegate approver requests** are submitted when an approver wants to delegate his or her approval authority in Travel and Expense to another approver.

Approving a Request

Concur Homepage

1. At the top of the Concur homepage, click the **Home** drop-down menu and select **Approvals.**

Review Expected Expenses (Details of the Request)

1. The Approvals screen defaults to the **Expense Reports** tab. Click on the **Requests** tab to view requests requiring approval.
2. Click on the **Request Name** hyperlink of the submitted request
3. On the **Expected Expenses** screen, the expense entries are listed
    a. For a **Pre-Trip Travel Request**, the expense types are listed with the estimated amounts for each
        i. **Allocated** appears under the **Requested** amount if the travel request entry was allocated to a different chartfield string
            1. Click on the **Allocated** hyperlink to view the allocation without opening the expense entry
    b. For a **Payment Card Request**, the expense types indicate the action being requested (e.g., New Card Request, Credit Limit Change Request, etc.)

    c. For a **Delegate Approver Request**, the expense type indicates the type of approval role being delegated (e.g., Supervisor, Budget Approver, Principal Investigator or Researcher/DA, VP/Dean)

    d. A yellow alert icon is a notification to call your attention to something that is non-standard or requires additional review in the request
        i. Click on the triangle icon to view the alert message
    e. A **talking bubble with three dots** indicates a **comment** was added on that entry
        i. Click the bubble to view the comment without opening the expense entry.
4. Review each entry in the request by clicking on the expense type
    a. Enter an Approver **Comment** if desired
    b. The user will be notified of comments added to the Request.

    c. Adding a comment does not prevent the request from being approved
5. Use the left and right arrows under the expense type at the top to navigate to the previous or next transaction or click **Cancel** or **Save** to return to the **Expected Expenses** screen
6. Review any yellow **Alert** notifications and take action accordingly (e.g., request more information, reject/send back the request, etc.)

Approve Request

Once all entries have been reviewed, the request is ready for approval.

7. On the **Expected Expenses** screen, click **Approve**

More Actions

Additional actions are available for the request.

Edit Approval Flow

The Approver can add additional ad-hoc approver(s) to the workflow.

1. On the **Expected Expenses** screen, click **More Action** > **Edit Approval Flow**
2. In the **Edit Approval Flow** screen, click **+Add Step**
3. In the **User-Added Approver** field, use the filter icon to select the search criteria (e.g., Last Name, First Name, Email Address, Login ID, Employee ID-which is the N Number) and then enter the search term in the box
4. Select the desired additional approver
5. Click **Save**
6. Once the request is approved, it will route based on the edited workflow.

Approve & Forward

This is the same functionality as above (Edit Approval Flow) in Request. There is a slight difference in how this is presented for Expense.

1. On the **Expected Expenses** screen, click **More Action** > **Approve & Forward**
2. In the **Edit Approval Flow** screen, click **+Add Step**
3. In the **User-Added Approver** field, use the filter icon to select the search criteria (e.g., Last Name, First Name, Email Address, Login ID, Employee ID - which is the N number) and then enter the search term in the box
4. Select the desired additional approver
5. Click **Save**
6. Once the request is approved, it will route based on the edited workflow.

Send Back to Employee

The approver can send the request back to the employee and request additional information, ask for the request to be edited **or to reject the request**.

1. On the **Expected Expenses** screen, click **More Action** > **Send Back to Employee**
2. In the **Send Back to Employee** screen, enter the **Reason for Sending Back the Request**
3. Click **Send Back**
    a. When a request is sent back to the employee, it can be updated by the user and re-submitted. If it is no longer valid or the user will not be re-submitting the request, it can be deleted from the user's queue.

View Request Details

The request header, timeline, audit trail, or allocation summary can be viewed at any time.

1. On the **Expected Expenses** screen, click on the **Request Details** hyperlink near the top
2. Click the desired option
    a. **Request Header** - shows the request header
    b. **Request Timeline** - shows the approval flow for the request
    c. **Audit Trail** - shows the actions that have been taken on the request since it was submitted

d. **Allocation Summary** - shows allocation details, in applicable

Related Resources

To learn more about using Travel and Expense, visit the Training and Resources page on the Travel and Expense website.

Additional Support

Questions? Visit the NYU Support Center or call FinanceLink at 212-998-1111.