Expense and Request Workflow

Requests and Expense Reports have different workflow.

Request Workflow

Request workflow is dependent upon how you answer the question on the request header "How will you be booking your travel?" The options are as follows:

Answer:	Approval required:
1-Booking air, hotel and/or car rental online in Concur Travel	Your travel supervisor (as defined in HR) must approve the request.
2-Booking outside of Concur Travel	Your travel supervisor (as defined in HR) must approve the request.
3- Verbal Supervisor Approval-Urgent booking online in Concur	No approval required in Concur. The system auto-approves these. Please note that you must maintain documentation of the verbal approval in your office.
4-Verbal Supervisor Approval-Urgent booking outside of Concur	No approval required in Concur. The system auto-approves these. Please note that you must maintain documentation of the verbal approval in your office.
5-Urgent Request created from Travel Booking-Verbal approval	No approval required in Concur. The system auto-approves these. Please note that you must maintain documentation of the verbal approval in your office.
6-Request created from Travel Booking-Needs Approval	Your travel supervisor (as defined in HR) must approve the request.

Once the request is approved by the supervisor (or auto-approved in the case of verbal approvals), you will see either a "book" link (for options 1 and 3 above) or an "expense" link (for all other options) appear beside your request. Your booking or expense report should be started by clicking on that link.

Expense Workflow (Non-Athletic)

Expense workflow is not dependent on how you answer a question. It is based on the following:
1. An expense report must always have supervisory approval before it can proceed in workflow.
    a. The supervisor is driven by the travel supervisor designated in HR. The supervisor will receive an email notifying them that a report is pending.
    b. If there is no travel supervisor designated, the traveler will not be able to submit an expense report.
    c. If the supervisor does not approve an expense report, the following will happen after their time limit expires:
        i. If the supervisor has a travel supervisor listed in Concur (based on HR), the report will be forwarded to their supervisor for approval.
        ii. If the supervisor does not have a travel supervisor listed in Concur (based on HR), the expense report will be returned to the traveler.
        iii. This process continues up the chain of command until the expense report is approved by a supervisor.
2. An expense report also needs approval(s) of the funding department(s).
    a. These are commonly called Concur Approvers, or Cost Object approvers.
    b. These approvals are designated by department numbers, by departmental personnel, in FAMS.
    c. A non-grant department can contain a maximum of two approvals, as designated in FAMS.
    d. A grant department can contain a maximum of three approvals, as designated in FAMS. The highest level of approval is always someone in the grants administration area.
3. The final approval is obtained in Financial Services, when the travel personnel review the report submitted to ensure that it complies with state policies.
4. Once fully approved, the expense report goes to PeopleSoft and the state for processing and payment.