



Procurement Card and Travel Services
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Roles in Concur

Traveler: Someone who travels on University Business

Delegate: Someone who prepares or processes travels on behalf of another individual

Reviewer: Reviews the travel reimbursement (expense reports) for accuracy before it goes to the approver.

Approver: Someone who has Signature Authority for your department. Approver may be Department head, Dean/Vice President/Administrator. The order of Approvers will define your workflow.

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Name: \_\_\_\_\_

Jag Number: \_\_\_\_\_

Department Name: \_\_\_\_\_

FOAPAL: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

What is your role? (Check all that apply)

Table with 4 columns: Traveler, Delegate, Reviewer, Approver

If someone travels in your department based on your role, what is the Workflow process based on your role?

List Workflow

- 1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

In the column below please list the Traveler's name and check if you are a Delegate or Previewer for the Traveler.

Traveler's Name	Delegate	Previewer

Department Head Signature: \_\_\_\_\_ Date: \_\_\_\_\_