

CONCUR ADLOC UPDATE FORM: For Pre-trip Workflows



INSTRUCTIONS: This form is designed to establish pre-trip workflow approvals through Concur for your adloc(s), based on administrative setup. Please complete this form for all adlocs and obtain required signatures. Please refer to the second page for instructions on how to complete the form, or send an email to payroll-concur@tamu.edu for questions.

Adloc:	Type:		Department Head Levels		Add Bookkeepers		Skip Intermediate	
Bookkeeper's Name(s)					Bookkeeper's UIN(s)			
1.			Action:		1.			
2.			Action:		2.			
3.			Action:		3.			
4.			Action:		4.			

Department Head Name _____ Signature _____ Date _____

Adloc:	Type:		Department Head Levels		Add Bookkeepers		Skip Intermediate	
Bookkeeper's Name(s)					Bookkeeper's UIN(s)			
1.			Action:		1.			
2.			Action:		2.			
3.			Action:		3.			
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Department Head Name _____ Signature _____ Date _____

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Bookkeeper's Name(s)					Bookkeeper's UIN(s)			
1.			Action:		1.			
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Department Head Name _____ Signature _____ Date _____

Adloc:	Type:		Department Head Levels		Add Bookkeepers		Skip Intermediate	
Bookkeeper's Name(s)					Bookkeeper's UIN(s)			
1.			Action:		1.			
2.			Action:		2.			
3.			Action:		3.			
4.			Action:		4.			

Department Head Name _____ Signature _____ Date _____

Senior Business Administrator Name _____ Signature _____ Date _____

Please submit completed form to payroll-concur@tamu.edu.

Instructions for completing CONCUR ADLOC UPDATE FORM:

1. **Adloc:** Enter the Adloc (Administrative Location) number. Ex: 02-137100.
2. **Type:** Indicate whether this is a change in the workflows of an existing adloc, or the creation of workflows for a new adloc.
3. **Department Head Levels:** Valid values are 0 - 3. 1 is the default to route authorization request up to the employee's department head. The Department Head is determined when an adloc change occurs from a subordinate to a Primary Manager. Increasing this value will ADD more people to the approval chain. A '2' will route the approval through the employee's Department Head and to the NEXT Department Head as indicated by the next adloc change. A "0" value stops the chain just prior to the department head.
4. **Add Bookkeeper:** Valid values are Y/N. By default, no bookkeeper approval desk will be inserted into the approval chain. Bookkeepers are intended to be administrative slots in the approval chain. The actual assignment of employees to this bookkeeper desk will be done in SSO using the new SSO Concur Bookkeeper role. Employees who have this role will be able to approve their adlocs travel requests that have stopped at this desk. If "Y" is selected, you must complete the Name and UIN field for at least one bookkeeper.
5. **Skip Intermediate:** Valid values are Y/N. By default, no intermediate supervisors will be skipped. This option can be used to skip all supervisors between the employee and the department head. Although, the bookkeeper option would still insert a bookkeeper desk. The intent is to give adlocs the option to streamline the pre-trip approval straight to the department head.
6. **Bookkeeper's Information:** The next two blocks of data collection include Bookkeeper's Name, and Bookkeeper's UIN. These fields give the department the ability to add administrative levels in the approval chain by adding bookkeepers. If a value of "Y" is selected in the "Add Bookkeepers" field, information about each bookkeeper added needs to be captured here. Please select the appropriate action for each bookkeeper, indicating whether you are adding or deleting access.
7. **Approvals:** Department Head and senior business administrator signatures authorization are required for each adloc modification.