Student Activities Funding Engine

Viewing and Matching Travel Approvals

SAFE
STUDENT ACTIVITY FUNDING ENGINE

PRINCETON UNIVERSITY

Beth Zawodniak
What’s NOT New
About Funding Undergraduate Student Travel?

• Undergraduate students are required to register all University-sponsored
  overnight travel (domestic and international) with the exception of travel to
  New York City and Philadelphia.

• Students are prompted and linked to the travel registration site when they
  request money through SAFE.

• Funders must verify that students have complied with this requirement prior
  to releasing funds.

• Travel Registration enrolls the traveler in ISOS and appropriate University
  insurance coverage and enables the University to guard against risk.

• Travel Registration enables University officials to immediately locate, contact,
  or provide assistance to the traveler in the event of a medical or global
  emergency.
What IS New?

- Travel is no longer registered on the Travel Registration Database; rather, trips are “requested” and “approved” in Concur via the University’s Travel and Expense Website.

- SAFE funders no longer need to leave SAFE to verify that a student has entered travel information. Now, the travel approval status can be viewed inside of SAFE.

- SAFE and Concur “talk” to each other. They try to match trip approvals with the correct SAFE projects.

- If the SAFE funder sees an “approved” green flag next to a project, she can be sure the student has complied with the travel registration obligations and it is permitted to release funds to that student.

- If the SAFE funder sees a “Pending” orange flag next to a project, she may need to “match” the travel record to the project.
Viewing Travel Request Status in SAFE on Award Funding and Pay Awards Screens

The Travel Request Status can have four values:

1. **Not Available** – Displayed if there is no travel request record in the system.

2. **Not Applicable** – Displayed for On Campus projects where there is no travel.

3. **Pending** – Given when the SAFE record is created, the student is planning to travel, and it has not yet been matched with a Concur record. *Note the record will not match until the project is locked.*

4. **Approved** – Given when a Concur travel request has been matched to the project.
Travel Request Status: Approved

When a travel request is returned and matched to a project, it will be marked as **Approved** and any travel information will be displayed.

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Project (Student Initiated)</th>
<th>Funding</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class of 2016 UCHM(AD) Status: Active 960751920</td>
<td>New bioelectrochemical technology for production of DC power from vegetable wastes Activity Type: Independent Projects Dates: 03/17/2014 thru 03/18/2014 Submitted On: 2/19/2014 Status: Final/locked Funding Source(s): Office of the Dean of the College Undergraduate Fund for Academic Conferences</td>
<td>Requested: $630.00 Awarded: $630.00 ODOC: Conference</td>
<td>award funding view project post project requirements pay awards print</td>
</tr>
</tbody>
</table>

**Travel Information**

**Travel Request Locations from Concur**

<table>
<thead>
<tr>
<th>Departure Location</th>
<th>Departure Time</th>
<th>Arrival Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>, Texas</td>
<td>3/19/2014 01:30 PM</td>
<td>, Florida</td>
</tr>
</tbody>
</table>

**Travel Warnings**

No Travel Warnings on this project.

Once the Travel Request Status is marked as “Approved,” **funders are free to release funds** in the form of direct deposit, a transfer into the student account or an interdepartmental transfer.
A student’s travel request status will be **Pending** when the SAFE record is created, the student intends to travel, and before it has been matched with a Concur project.

*Note the record will not match until the project is locked.*

The Concur record may not be matched with the SAFE project because:

- The student has very recently entered their trip information into Concur and it has not yet been reviewed. Note: trips are usually reviewed within a couple of days.

- The student is missing required information in the Concur trip request and it cannot be approved.

- Concur cannot match its travel record with the correct project because some of the required criteria do not match exactly.
When a Concur Trip Request Does Not Match to a SAFE Project

At times, funding opportunity administrators will need to *manually* match a Concur travel approval to the appropriate student project in SAFE as in scenarios listed below.

- **If Concur cannot match** its travel record with the correct project because some of the required criteria do not match exactly, the funder can link the Concur record with the project.

- **If SAFE incorrectly matches** a travel request with a project, a funding opportunity administrator can “un-match” that request and then choose the correct travel request to associate with the project.

A funder can see that a project has not matched to a **locked** SAFE project because the Travel Request Status on the Award Funding screen will be “pending” AND a link will appear on the right margin that states: “**Applicant has X total travel requests**”.

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### Travel Information

- **Travel Request Status:** PENDING

- **TravelWarnings:** No Travel Warnings on this project.
View Concur Travel Records

Select the **Award Funding** Action from the Projects List

Scroll to the Travel Information section. Check to see if the student has any travel requests. If so, click the link to view the Travel Request Summary/Maintenance page.

Applicant has 1 total travel requests
Manually Matching Pending Travel Requests to SAFE Projects

- Scroll to the **Travel Request Information** section and scan the details of the travel record(s).
- If they match this SAFE project, select **Unlock**. Then select **Link to Project**.
- *Note: this action can be undone by selecting **Unlink Project**.*
Reminders for SAFE Funders

- Note details of the student’s project. Is he/she traveling? Has he/she correctly selected that country in the SAFE application? If not, the application is not valid.

- If the student is traveling, before Paying Awards look for the green approved note in the travel information section of their project (on the pay awards page).

- Verify that the travel information that was linked to the project was matched accurately.

- If the travel approval is pending, check for and view travel records. Manually match if necessary.

- If the travel request status is not approved, do not pay the award until it is. You could reach out to remind the student to register the trip in Concur but you are not obligated.

SAFE funders have done their due diligence when they see that a Travel Request Status shows as Approved. Approved means the student has complied with his/her obligations for registering travel and obtaining relevant travel waivers.

Travel Oversight Group

The Travel Oversight Group is responsible for responding to any traveler emergencies (e.g. health issues, country-specific/regional disruptions.) The Travel Oversight Group receives alerts and notifications whenever a traveler needs assistance or whenever a natural disaster or political/social disruption may pose a safety hazard for multiple travelers. The Travel Oversight Group is fully responsible for providing assistance in these situations.

The group consists of: Chris Burkmar (Office of the Vice President for Campus Life), Nancy Kanach and Mell Bolen (Office of International Programs/ODOC), Megan Adams and Missy McGinn (Risk Management/F&T), Diana Davies (Provost’s Office) and Cindy Shumate (Finance and Treasurer).

4/18/2014
Where to Find Help…

- Beth Zawodniak
  - 8-4470.; safe@princeton.edu

- SAFE Users Website—www.princeton.edu/safeusers/
  - http://www.princeton.edu/safeusers/resources-for-administrat/safe-concur-travel-interf/

- SAFE-Concur Integration Training Guide