

Workflow - All Approvers:
**Adding an Approver to
the Report Workflow**

Welcome to our training on adding an approver to the report workflow in Concur.



There are two ways to add an approver to expense reports.

Travel to Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

- Report
 - Report Header
 - Totals
 - Audit Trail
 - Approval Flow
 - Comments
- Allocations
 - Allocations
- Travel Allowances
 - Expenses & Adjustments
 - Reimbursable Allowances Summary

	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	Adjusted Clai...
			Atlanta, Georgia	Out of Pocket	\$34.50	\$34.50
			Atlanta, Georgia	Out of Pocket	\$2.50	\$2.50
			Atlanta, Georgia	Out of Pocket	\$34.50	\$34.50
			Atlanta, Georgia	Out of Pocket	\$2.50	\$2.50
		Holiday Inn	Atlanta, Georgia	Out of Pocket	\$500.00	
		1Time Airline	Manhattan, Ka...	Out of Pocket	\$750.00	\$750.00
		Conference Registration	Cool Conferen...	Out of Pocket	\$2,500.00	\$2,500.00
		Enterprise	Atlanta, Georgia	Out of Pocket	\$250.00	\$250.00
10/02/2023		Incidentals Per Diem	Atlanta, Georgia	Out of Pocket	\$1.25	\$1.25
10/02/2023		Meal Per Diem	Atlanta, Georgia	Out of Pocket	\$17.25	\$17.25

The first is to click on the Details dropdown menu and select Approval Flow.

Travel to Super Cool Conference [Test, Stacy]

Summary Details Receipts Print / Email

Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Add
	10/04/2023	Meal Per Diem		
	10/04/2023	Incidentals Per Diem		
	10/03/2023	Meal Per Diem		
	10/03/2023	Incidentals Per Diem		
	10/02/2023	Hotel	Holiday Inn	
	10/02/2023	Airfare	1Time Airline	
	10/02/2023	Travel-Related Training & Conference Registration	Cool Conferen...	
	10/02/2023	Car Rental	Enterprise	
	10/02/2023	Incidentals Per Diem		
	10/02/2023	Meal Per Diem		

Approval Flow for Report: Travel to Super Cool Conference

→ Business Liaison Approval:

Cost Object Approval:

Accounts Payable Approval:

Accounts Payable Manager Approval:

This window will show the steps of the approval completed so far, as well as those remaining.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▼ Receipts ▼ Print / Email ▼

Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Add
	10/04/2023	Meal Per Diem		
	10/04/2023	Incidentals Per Diem		
	10/03/2023	Meal Per Diem		
	10/03/2023	Incidentals Per Diem		
	10/02/2023	Hotel	Holiday Inn	
	10/02/2023	Airfare	1Time Airline	
	10/02/2023	Travel-Related Training & Conference Registration	Cool Conferen...	
	10/02/2023	Car Rental	Enterprise	
	10/02/2023	Incidentals Per Diem		
	10/02/2023	Meal Per Diem		

Approval Flow for Report: Travel to Super Cool Conference

→ Business Liaison Approval:

Cost Object Approval:

Accounts Payable Approval:

Accounts Payable Manager Approval:



At the point in the workflow the additional approver needs to be added, click on the blue plus sign icon at the right of the window.

Travel to Super Cool Conference [Test, Stacy]

Summary Details Receipts Print / Email

Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...
10/04/2023	Meal Per Diem		
10/04/2023	Incidentals Per Diem		
10/03/2023	Meal Per Diem		
10/03/2023	Incidentals Per Diem		
10/02/2023	Hotel	Holiday Inn	
10/02/2023	Airfare	1Time Airline	
10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...	
10/02/2023	Car Rental	Enterprise	
10/02/2023	Incidentals Per Diem		
10/02/2023	Meal Per Diem		

Approval Flow for Report: Travel to Super Cool Conference

→ Business Liaison Approval:
Test, Christa


User-Added Approver:
Search Approvers By

Cost Object Approval:

Accounts Payable Approval:

Approve Send Back

Save Workflow Cancel



Click inside the User-Added Approver field that appears to generate the Search Approvers By dropdown menu.

The screenshot displays the SAP Concur 'Approvals' section for a report titled 'Travel to Super Cool Conference'. The main area shows a table of expenses with columns for Transaction Date, Expense Type, and Vendor. An 'Approval Flow for Report: Travel to Super Cool Conference' modal is open on the right, showing a 'Business Liaison Approval' step with the name 'Test, Christa'. Below this, there is a 'User-Added Approver' section with a dropdown menu. A yellow arrow points to the dropdown arrow, indicating where to click to select a search method. The dropdown menu lists search criteria: Last Name, First Name, Email Address, Login ID, and Employee ID.

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...
10/04/2023	Meal Per Diem		
10/04/2023	Incidentals Per Diem		
10/03/2023	Meal Per Diem		
10/03/2023	Incidentals Per Diem		
10/02/2023	Hotel	Holiday Inn	
10/02/2023	Airfare	1Time Airline	
10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...	
10/02/2023	Car Rental	Enterprise	
10/02/2023	Incidentals Per Diem		
10/02/2023	Meal Per Diem		

Click the dropdown menu arrow and select how you wish to search.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Additional Int...
	10/04/2023	Meal Per Diem		
	10/04/2023	Incidentals Per Diem		
	10/03/2023	Meal Per Diem		
	10/03/2023	Incidentals Per Diem		
	10/02/2023	Hotel	Holiday Inn	
	10/02/2023	Airfare	1Time Airline	
	10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...	
	10/02/2023	Car Rental	Enterprise	
	10/02/2023	Incidentals Per Diem		
	10/02/2023	Meal Per Diem		

Approval Flow for Report: Travel to Super Cool Conference

→ Business Liaison Approval:

Test, Christa

User-Added Approver:

nick
Test, Nick (nickz@k-state.edu)
Employee ID: Tst003
Logon ID: NickTest@k-state.edu.uat

First Name

Accounts Payable Approval:

Approve Send Back

Save Workflow Cancel

Then search for and select the person you wish to add,

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Additional Int...
	10/04/2023	Meal Per Diem		
	10/04/2023	Incidentals Per Diem		
	10/03/2023	Meal Per Diem		
	10/03/2023	Incidentals Per Diem		
	10/02/2023	Hotel	Holiday Inn	
	10/02/2023	Airfare	1Time Airline	
	10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...	
	10/02/2023	Car Rental	Enterprise	
	10/02/2023	Incidentals Per Diem		
	10/02/2023	Meal Per Diem		

Approval Flow for Report: Travel to Super Cool Conference

→ Business Liaison Approval:

Test, Christa

User-Added Approver:

nick

Test, Nick (nickz@k-state.edu)

Employee ID: Tst003

Logon ID: NickTest@k-state.edu.uat

First Name

Accounts Payable Approval:

Approve Send Back

Save Workflow Cancel



and click the Save Workflow button at the bottom of the window.

SAP Concur Approvals

Approvals Home Requests Reports

Red Stapler [Test, Stacy]

Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email

Exceptions

Expense Type	Date	Amount	Exception
Office Supplies	10/09/2023	\$15.00	Requires AES approval.

Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...
10/09/2023	Office Supplies	Staples	

Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$15.00











TOTAL AMOUNT \$15.00 TOTAL REQUESTED \$15.00

The second way to add an additional approver is to click, once you are ready to approve the report, on the Approve & Forward button at the top right of the screen.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	View	Summary
 10/04/2023	Meal Per Diem			Atlanta, G				
 10/04/2023	Incidentals Per Diem			Atlanta, G				
 10/03/2023	Meal Per Diem			Atlanta, G				
 10/03/2023	Incidentals Per Diem			Atlanta, G				
 10/02/2023	Hotel	Holiday Inn		Atlanta, G				
 10/02/2023	Airfare	1Time Airline		Manhattar				
 10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...		Atlanta, G				
 10/02/2023	Car Rental	Enterprise		Atlanta, G				
 10/02/2023	Incidentals Per Diem			Atlanta, G				
 10/02/2023	Meal Per Diem			Atlanta, G				

Approve & Forward Report for Travel to Super Cool Conference

User-Added Approver:

Search Approvers By

Click inside the User-Added Approver field that appears to generate the Search Approvers By dropdown menu.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	Adjusted Clai...	Receipt Summary
10/04/2023	Meal Per Diem			Atlanta, G				
10/04/2023	Incidentals Per Diem			Atlanta, G				
10/03/2023	Meal Per Diem			Atlanta, G				
10/03/2023	Incidentals Per Diem			Atlanta, G				
> 10/02/2023	Hotel	Holiday Inn		Atlanta, G				
10/02/2023	Airfare	1Time Airline		Manhattar				
10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...		Atlanta, G				
10/02/2023	Car Rental	Enterprise		Atlanta, G				
10/02/2023	Incidentals Per Diem			Atlanta, G				
10/02/2023	Meal Per Diem			Atlanta, G				

Approve & Forward Report: Travel to Super Cool Conference

User-Added Approver:

▼

Last Name

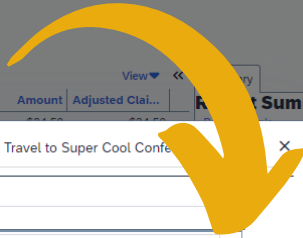
First Name

Email Address

Login ID

Employee ID

Approve & Forward Cancel













Click the dropdown menu arrow and select how you wish to search.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type
 10/04/2023	Meal Per Diem				
 10/04/2023	Incidentals Per Diem				
 10/03/2023	Meal Per Diem				
 10/03/2023	Incidentals Per Diem				
 10/02/2023	Hotel				
 10/02/2023	Airfare				
 10/02/2023	Travel-Related Training & Conference Registration				
 10/02/2023	Car Rental				
 10/02/2023	Incidentals Per Diem				
 10/02/2023	Meal Per Diem				

Approve & Forward Report: Travel to Super Cool Conference

User-Added Approver:

Test, Nick (nickz@k-state.edu)

Test, Nick (nickz@k-state.edu)
Employee ID: Tst003
Logon ID: NickTest@k-state.edu.uat











First Name

Search for and select the person you wish to add,

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	Adjusted Clai...	Report Summary
	10/04/2023	Meal Per Diem			Atlanta, G				
	10/04/2023	Incidentals Per Diem			Atlanta, G				
	10/03/2023	Meal Per Diem			Atlanta, G				
	10/03/2023	Incidentals Per Diem			Atlanta, G				
	10/02/2023	Hotel	Holiday Inn		Atlanta, G				
	10/02/2023	Airfare	1Time Airline		Manhattar				
	10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...		Atlanta, G				
	10/02/2023	Car Rental	Enterprise		Atlanta, G				
	10/02/2023	Incidentals Per Diem			Atlanta, G				
	10/02/2023	Meal Per Diem			Atlanta, G				

Approve & Forward Report: Travel to Super Cool Conference

User-Added Approver:











Comment:

add a comment in the comment box to explain why that person is receiving this report,

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾


Expenses

	Transaction D...	Expense Type	Enter Vendor ...	Additional Inf...	City of Purcha...	Payment Type	Amount	Adjusted Clai...	View ▾ <<	Summary
	10/04/2023	Meal Per Diem			Atlanta, G					
	10/04/2023	Incidentals Per Diem			Atlanta, G					
	10/03/2023	Meal Per Diem			Atlanta, G					
	10/03/2023	Incidentals Per Diem			Atlanta, G					
> 	10/02/2023	Hotel	Holiday Inn		Atlanta, G					
	10/02/2023	Airfare	1Time Airline		Manhattar					
	10/02/2023	Travel-Related Training & Conference Re...	Cool Conferen...		Atlanta, G					
	10/02/2023	Car Rental	Enterprise		Atlanta, G					
	10/02/2023	Incidentals Per Diem			Atlanta, G					
	10/02/2023	Meal Per Diem			Atlanta, G					

Approve & Forward Report: Travel to Super Cool Conference ✕

User-Added Approver:

Comment:



and then click Approve & Forward.