

Workflow:


Adding an Approver to the Request Workflow


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



There are two ways to add an approver to requests.

The screenshot shows the SAP Concur interface for a request titled "Britt McLaughlin PCARD". The user is logged in as "Britt Test". The request is in a "Pending Business Liaison Approval" state with a Request ID of "33MY". There is one alert associated with the request. The "EXPECTED EXPENSES" section shows a table with one entry: "1) New Card" with a date of "12/07/2023" and an amount of "\$0.00". A yellow arrow points to the "More Actions" dropdown menu, which is open and shows the following options: "Edit Approval Flow", "Approve & Forward", and "Send Back to Employee".

SAP Concur 

SAP Concur  Approvals ▾ CT

Approvals Home Requests Reports

Home / Approvals / Requests / Britt McLaughlin PCARD

Alerts: 1

Britt McLaughlin PCARD

Britt Test | Pending Business Liaison Approval | Request ID: 33MY

Request Details ▾ Attachments ▾

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts↑ Expense type↑	Details↓	Date↓	Amount↑	Requested↓
<input type="checkbox"/>	✖ 1) New Card		12/07/2023		\$0.00

The first is to edit the approval flow, which you can do either by clicking on the More Actions dropdown menu and selecting Edit Approval Flow

The screenshot shows the SAP Concur interface for a request titled "Britt McLaughlin PCARD". The page includes a navigation bar with "SAP Concur" and "Approvals" menus. Below the navigation, there are tabs for "Approvals Home", "Requests", and "Reports". A breadcrumb trail indicates the path: "Home / Approvals / Requests / Britt McLaughlin PCARD". A pink alert banner at the top states "Alerts: 1". The main content area displays the request details, including the user "Britt Test | P", the request type "Business Liaison Approval", and the "Request ID: 33MY". There are buttons for "More Actions" and "Approve". A dropdown menu for "Request Details" is open, showing options: "Request", "Request Header", "Request Timeline" (circled in yellow), and "Audit Trail". A yellow arrow points from the "Request Timeline" option to the "Request ID" field. Below the dropdown, there are buttons for "delete" and "Allocate". A table lists the request items:

<input type="checkbox"/>	Alerts↑	Expense type↑	Details↓	Date↓	Amount↑	Requested↓
<input type="checkbox"/>	1)	New Card		12/07/2023		\$0.00

Or by clicking on the Request Details dropdown menu, selecting Request Timeline,

Request Timeline

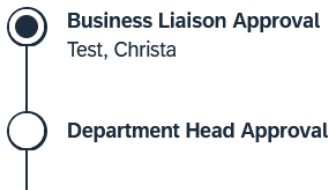
Britt McLaughlin PCARD | \$0.00



Approval Flow

[Edit](#)

Request Summary





EXPENSE COMMENT  1) New Card 12/07/2023 \$0.00 [View](#)

Test, Britt 12/07/2023

To buy all the things.

And then, on the timeline screen, clicking on the Edit button.

SAP Concur 

SAP Concur  Approvals ▾ ⊙ CT

Approvals Home Requests Reports

Home / Approvals / Requests / Britt McLaughlin PCARD

Alerts: 1

Britt McLaughlin PCARD

Britt Test | Pending Business Liaison Approval | Request ID: 33MY

Request Details ▾ Attachments ▾

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts↑	Expense type↑	Details↓	Date↓	Amount↑	Requested↓
<input type="checkbox"/>	✖	1) New Card		12/07/2023		\$0.00

The second way to add an additional approver is to click, once you are ready to approve the report, on the More Actions dropdown menu and select Approve & Forward.

SAP Concur Approvals

Alerts: 1

Missing required fields: Department Name (displayed on card).

Business Liaison Approval

Test, Christa

+ Add Step

Department Head Approval

+ Add Step

Credit Card Admin Review

+ Add Step

Cancel Save

Whichever option you choose opens a screen that identifies the steps of the workflow.

SAP Concur Approvals

Approvals Home Requests Reports

Home / Approvals / Requests / Britt McLaughlin P-Card

Alerts: 1

Britt McLaughlin P-Card

Britt Test | Pending Business Liaison Approval | Re

Request Details Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

Alerts Expense type

Alerts: 1

Missing required fields: Department Name (displayed on card).

Business Liaison Approval

Test, Christa

+ Add Step

Department Head Approval

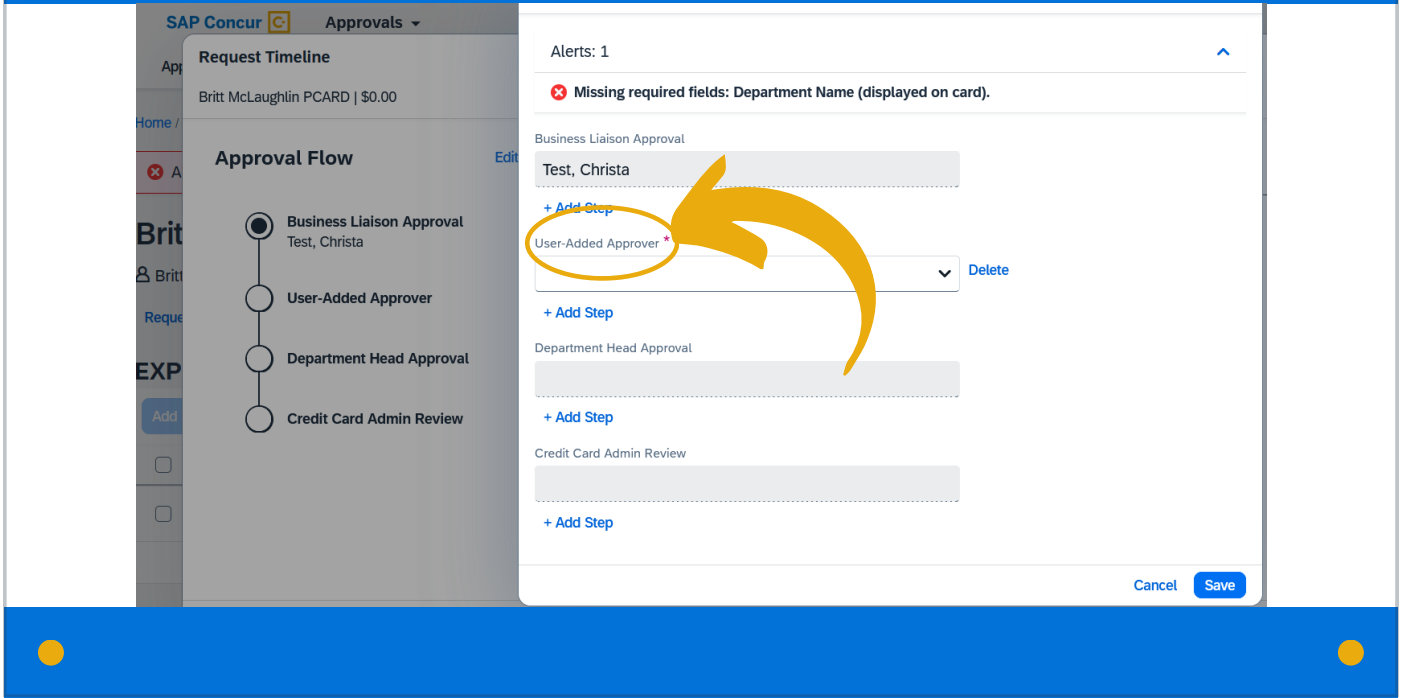
+ Add Step

Credit Card Admin Review

+ Add Step

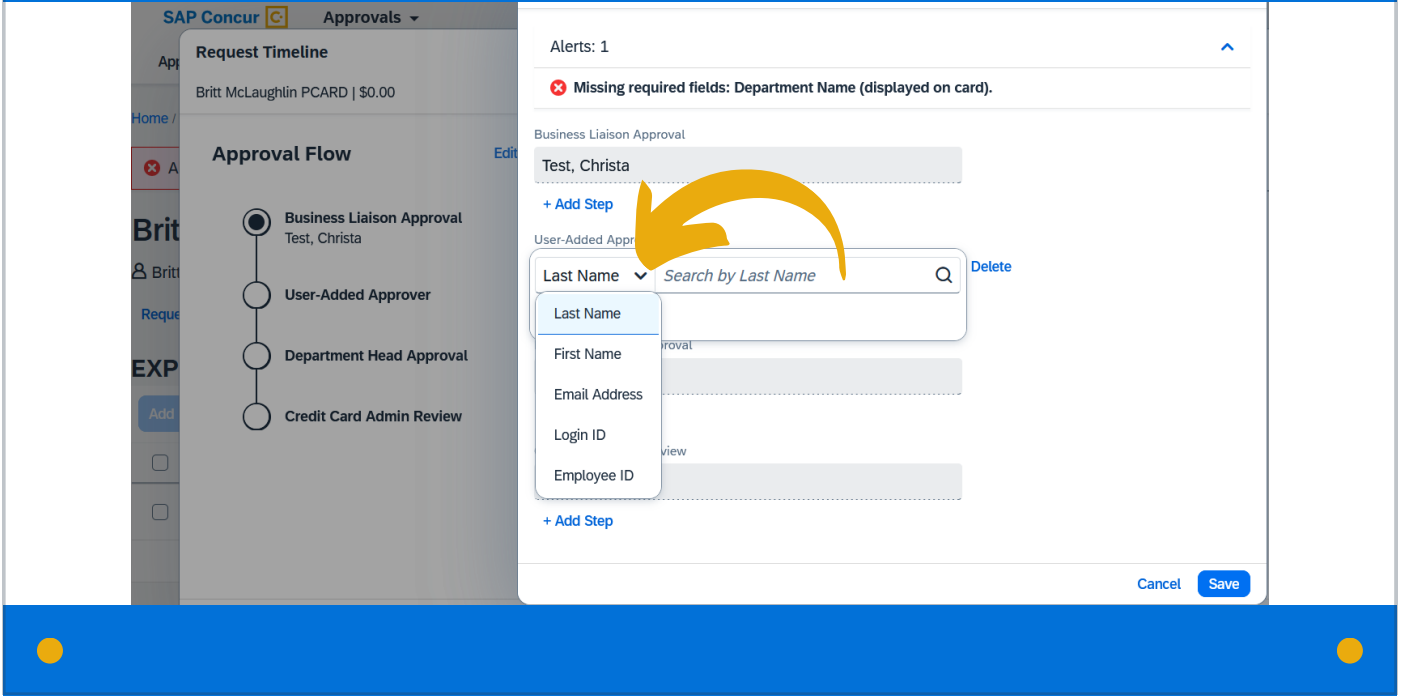
Cancel Save

At the point at which you wish to add an approver, click on Add Step.

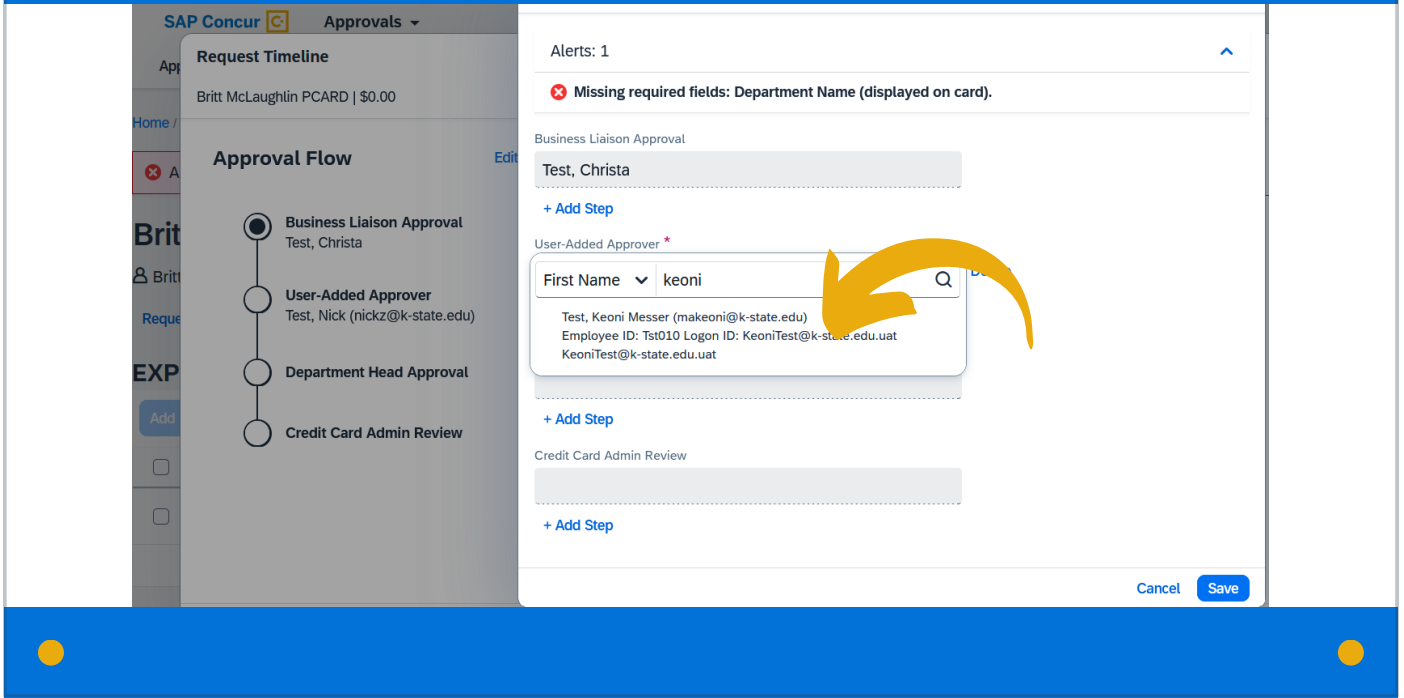


The screenshot displays the SAP Concur 'Approvals' interface. On the left, a sidebar shows the 'Request Timeline' for 'Britt McLaughlin PCARD | \$0.00' and an 'Approval Flow' diagram. The flow consists of four steps: 'Business Liaison Approval' (Test, Christa), 'User-Added Approver', 'Department Head Approval', and 'Credit Card Admin Review'. The main panel on the right shows the details for the 'Business Liaison Approval' step, which is currently assigned to 'Test, Christa'. Below this, a 'User-Added Approver' step is visible, highlighted with a yellow circle and a yellow arrow. This step includes a dropdown menu and a 'Delete' button. The interface also features an 'Alerts' section at the top right, indicating a 'Missing required fields: Department Name (displayed on card)'. At the bottom right, there are 'Cancel' and 'Save' buttons.

You will see a workflow step appear labeled User-added Approver.

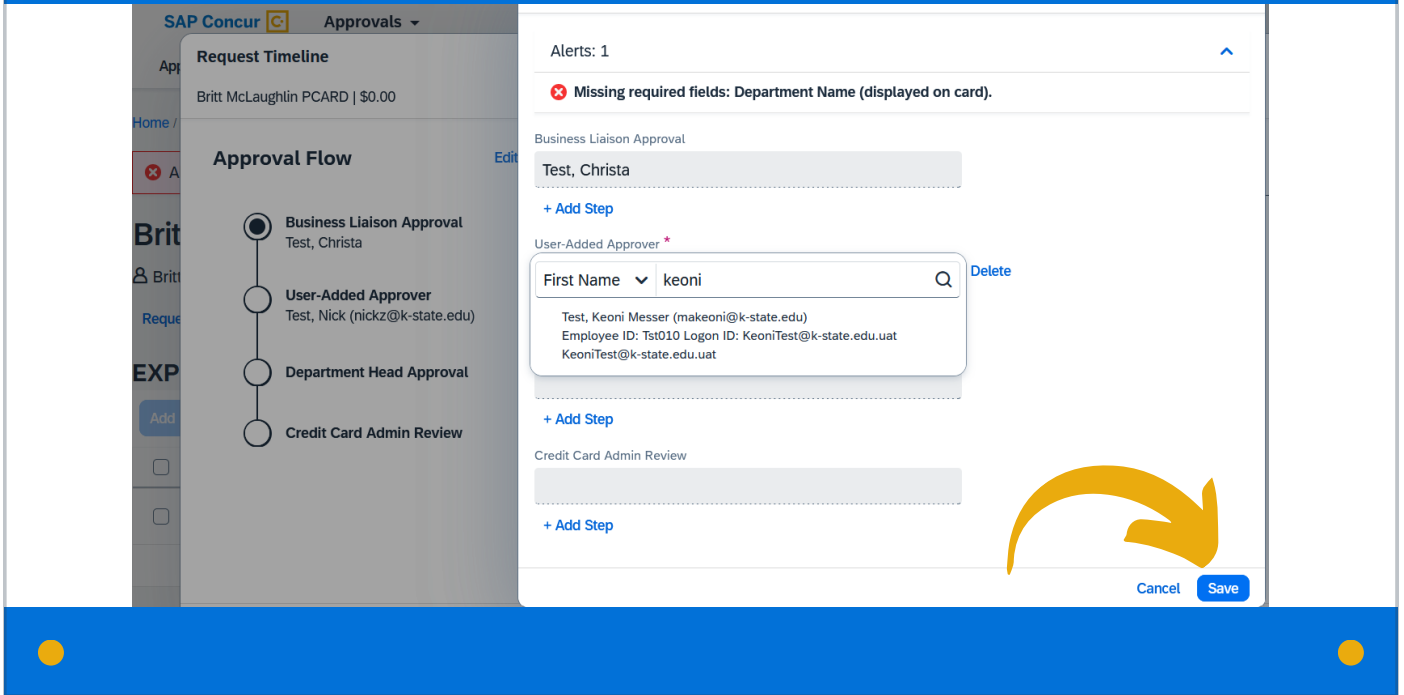


Click on the dropdown menu to select how you wish to search.



The screenshot displays the SAP Concur 'Approvals' interface. On the left, a sidebar shows the 'Request Timeline' for 'Britt McLaughlin PCARD | \$0.00' and an 'Approval Flow' diagram. The flow consists of four steps: 'Business Liaison Approval' (Test, Christa), 'User-Added Approver' (Test, Nick (nickz@k-state.edu)), 'Department Head Approval', and 'Credit Card Admin Review'. The main area shows a list of steps with a search dropdown for 'User-Added Approver'. The dropdown is open, showing a search for 'keoni' with a search icon. A yellow arrow points to the search results, which include 'Test, Keoni Messer (makeoni@k-state.edu)', 'Employee ID: Tst010 Logon ID: KeoniTest@k-state.edu.uat', and 'KeoniTest@k-state.edu.uat'. A 'Missing required fields: Department Name (displayed on card)' alert is visible at the top. 'Cancel' and 'Save' buttons are at the bottom right.

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



The screenshot displays the SAP Concur 'Approvals' interface. On the left, a sidebar shows the 'Request Timeline' for 'Britt McLaughlin PCARD | \$0.00' and an 'Approval Flow' diagram with four steps: 'Business Liaison Approval' (Test, Christa), 'User-Added Approver' (Test, Nick), 'Department Head Approval', and 'Credit Card Admin Review'. The main panel shows a 'Business Liaison Approval' step with a search for 'User-Added Approver'. A search dropdown is open, showing 'Test, Keoni Messer' with details like 'Employee ID: Tst010' and 'Logon ID: KeoniTest@k-state.edu.uat'. A yellow arrow points to the 'Save' button at the bottom right of the main panel.

And click save. The approver is now added.