REQUEST: APPROVING & FORWARDING REQUEST (ADDING ADDITIONAL APPROVERS)





Approving a Request

1. Approvers can access the **Approvals** page by clicking the **Approvals** tab or clicking the **Authorizations Requests** link under **Required Approvals** in the **My Tasks** section of the SAP Concur home page.

	SAP Concur 🖸	Requests	Travel	Expense	Invoice	Approvals	Report
	SAP Con	cur 🖸				+	
	Hello, Pat					New	
-	TRIP SEARCH			MY TA	SKS		
	♠ 🛱 🛏 💂			99	\rightarrow		
	Round Trip	arch Dne Way	Multi City	Autho	rization Requ	iests	06
	From ② Departure city, airport or trai	in station		Expen	se Reports		106
	To ?	Find an airport Sek	ect multiple airports	Cash	Advances		01
	Hide Marine Fares 🕜	Find an airport Sel	ect multiple airports	Invoic	es		07
	S	earch					

2. You can select the check box for a request and click **Approve** to approve the request or open the request and approve the request from within the request.



3. Clicking **Requests** at the top of the **Approvals** page opens the **Requests Pending your Approval** page.

								Administrat	ion 🗸 Help 🗸
SAP	Concur C Requests	Travel Expense	Invoice Approva	als Reporting -	 App Cente 	er Links -			Profile 🝷 💄
Approv	vals Home Requests Rep	oorts Cash Advances	Purchase Requests	Invoices					
Requ	uests Pending	your Approva	al (6)						
View • Request	Name V B	egins With	~		Go				
	Request Name	Employee Name	Request ID	Request Dates •	Comment	Date Submitted	Total	Approved amount	Remaining amount
	Trip to Barcelona Client visit	Brown, Terry	3F7G	10/14/2019 10/15/2019		09/30/2019	\$288.96	\$288.96	\$288.96
	Railway Ticket to Chicago Customer onsite visits	Brown, Terry	3F6Y	10/07/2019		04/22/2019	\$160.00	\$160.00	\$160.00
	Trip to Paris Sales conference	Brown, Terry	3F7F	09/30/2019		09/30/2019	\$841.71	\$841.71	\$841.71
	December Sales Meeting Sales meeting	Brown, Terry	34PF	12/19/2016 12/21/2016		12/06/2016	\$700.00	\$700.00	\$700.00
	Trip from Seattle to San Francisco Testing	Brown, Terry	337Y	05/26/2016		05/17/2016	\$580.67	\$580.67	\$580.67
	Trip to Denver Sales conference	Brown, Terry	333U	09/28/2015		06/24/2015	\$300.00	\$300.00	\$300.00
				10/02/2015					

4. Clicking the row for a request opens the **Request Header** tab for the request. You can click **Approve** or **Approve & Forward** to approve the request from within the request.

SAP Concur Requests Iravel Expense Invoice Approvals Reporting - App Center Links - Approvals Home Requests Reports Cash Advances Purchase Requests Invoices Request Aame: Trip to Barcelona Cancel Save Attachments * Print / Email * Stend Back Request Impose Request Name: Trip to Barcelona Request Policy Start Date End Date Trip to Barcelona Travel Request Policy Start Date End Date Client visit Comment Employee last name Employee last name	Profile 👻 💄
Approvals Home Requests Reports Cash Advances Purchase Requests Invoices Request 3F7G [Brown, Terry] Cancel Save Attachments Print / Email Cond Back Request (Attachments Print) Request Name: Trip to Barcelona Purpose: Client visit Request Name Request Policy Start Date End Date Trip to Barcelona Travel Request Policy 10/14/2019 10/15/2019 End Date Purpose: Centent Visit Employee tast name Brown, Terry	
Request 3F7G [Brown, Terry] Cancel Save Attachments • Print / Email • Send Back Request Interview Status:	
Request Header Expense Summary Approval Flow Audit Trail Request Name Request Policy Start Date End Date Trip to Barcelona Travel Request Policy 10/14/2019 10/15/2019 Purpose Comment Employee last name Client visit Brown, Terry	Approve & Forward mitted & Pending Approval Amount: \$288.96
Request Name Request Policy Start Date End Date Trip to Barcelona Travel Request Policy 10/14/2019 10/15/2019 Purpose Comment Employee last name Client visit Brown, Terry	
Trip to Barcelona Travel Request Policy 10/14/2019 10/15/2019 Purpose Comment Employee last name Client visit Brown, Terry	A
Purpose Comment Employee last name Client visit Brown, Terry	
Client visit Brown, Terry	
	*

5. On the **Requests Pending your Approval** page, you can open the view list to view the approved requests or navigate back to the **Requests Pending your Approval** page.

SAP Concur 🖸 Requ	uests Travel	Expense Inv	roice Approv	als
Approvals Home Requests	Reports C	ash Advances Po	urchase Requests	Invo
Requests Pend	ing your	Approval	(6)	
View Jun				
Requests Pending your Appr Requests you Approved this	oval Month ^{s With}	~		
Requests you Approved last	Month nployee	Name	Request ID	Reque
Requests you Approved this	Quarter own, Terr	у	3F7G	10/1-
Requests you Approved last	Quarter			10/1
Requests you Approved this	Year pwn, Terr	у	3F6Y	10/0
Requests you Approved last	Year			10/1
All Approved Requests	own, Terr	у	3F7F	09/30
				10/04
December Sales Meeting	Brown, Terr	у	34PF	12/19

Approving a Request

You can approve a request from the **Approvals** page or from within a request.

• To approve a request from the **Approvals** page, select the check box for the request and then click **Approve**.

Approvals						
Г	DO Trips	06 Requests		106 Expense Reports		
Requests						
	Request Type Travel		Request Name			
			Trip to Client	o Barcelona It visit		
	Travel		Railwa Custor	ay Ticket to Chicago mer onsite visits		

• To approve a request from within a request, open the **Expected Expenses** page, and then click **Approve**.

Opening the Expected Expenses page

- It is the Approvers responsibility to review all expenses and funding for each travel request prior to approving.
- To open the **Expected Expenses** page for a request from the **Approvals** page, click the request link in the **Request Name** or **Request ID** column.
- To open the **Expected Expenses** page for a request from the **Requests Pending your Approval** page, click the request link in the **Request Name** column.



Approving and Forwarding a Request

Use the More Actions > Edit Approval Flow selection.

To approve and forward a request to another approver

- 1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
- 2. Click More Actions > Edit Approval Flow.

Trip to Barcelona \$288.96	More Actions
Submitted & Pending Approval Request ID: 3F7G	Edit Approval Flow
EXPECTED EXPENSES	

3. In the Edit Approval Flow dialog, click Add Step.

Edit Approval Flow		×
Manager Approval		
Davis, Pat		
+ Add Step		
Approved - Pending Booking		
+ Add Step		
	Cancel	Save

4. In the **User-Added Approver** field, start typing the approver's name to search for the additional approver, and then click their name to populate the field.

		~
Manager Approval		
Davis, Pat		
+ Add Step		
User-Added Approver		
▼ - collin	Delete	
+ Add Sta Add Sta Approved CommaSavvy.com Cc@CommaSavvy.com		
+ Add Step		
	Orrest	6

- 5. Click Save
- 6. Click Approve.

Trip to Barcelona \$288.96 Submitted & Pending Approval Request ID: 3F7G	More Actions 🔻 Approve
Request Details ▼ View Budget Print/Share ▼ EXPECTED EXPENSES	
Add - Edit Allocate Delete	

7 | Concur Request – Approving and Forwarding Requests

The request is approved and forwarded to the next approver.

Questions? Please contact Stephanie Albright at polytravel@calpoly.edu