

# **Concur Expense: Approval Routing**

## **Setup Guide for Standard Edition**

**Last Revised: December 10, 2021**

Applies to these SAP Concur solutions:

- Expense
  - Professional/Premium edition
  - Standard edition
  
- Travel
  - Professional/Premium edition
  - Standard edition
  
- Invoice
  - Professional/Premium edition
  - Standard edition
  
- Request
  - Professional/Premium edition
  - Standard edition

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## Revision History

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated instructions for <b>Product Settings</b> page
January 21, 2021	Updated the copyright; added Concur to the cover page title; cover date not updated
June 20, 2020	Updated Users page images.
April 16, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 3, 2020	Updated the copyright; no other changes; cover date not updated
December 16, 2019	Added the new processor only workflow.
August 10, 2019	Minor edits
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
April 13, 2019	Added information about Budget Workflow
January 10, 2019	Updated the copyright; no other changes; cover date not updated
April 14, 2018	Updated the approval routing timeout duration to coincide with a renamed checkbox and new integer field. Updated screen shots to reflect changes in the UI. Updated flowchart to reflect the new timeout duration.
April 6, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 13 2018	Updated the copyright; no other changes; cover date not updated
November 4 2017	Updated guide to include new <b>Product Settings</b> page, which replaces the Setup Wizard.
March 18 2017	Updated with menu option name change to access Setup Wizard.
December 15 2016	Changed copyright; no other content changes.
November 20 2015	Updated graphics to reflect updated step names and instructional text where applicable.
February 6 2015	Updated the screen shots to the enhanced UI Removed information about two user interfaces; no other content changes
September 16 2014	Added information about two user interfaces; no other content changes
August 22 2014	Added section: Approval Time Out
July 11 2014	Specified the 10-day timeframe after which the system will forward an unapproved report to the second approver (if a second approver is configured.)
May 16 2014	New document. (This content originated from the <i>Expense Setup Guide for Concur Standard</i> .)



# Approval Routing

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This page of Product Settings is visible only when enabled by SAP Concur support.

## Section 1: Overview

The **Approval Routing** page of Product Settings allows you to select the process that expense reports go through for approvals. There are five workflow options:

- **Processor:** This is the simplest option for routing expense reports directly to the processor and is the default setting.
- **Manager > Processor:** This option ensures that every expense report is approved by one manager, the employee's manager.
- **Manager > Authorized Approver > Processor:** This option ensures that approval limits are used.
- **Manager > Second Approver > Processor:** This option ensures that every expense report is approved by two managers prior to reaching a processor.
- **Manager > Manager's Manager (up to 5 levels) > Processor:** This option ensures that when handling large volumes of expense reports only those expense reports requiring the highest approval limits reach upper management.

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**NOTE:** Options 2 and 4 are role-based while options 3 and 5 are role-based *and* limit-based.

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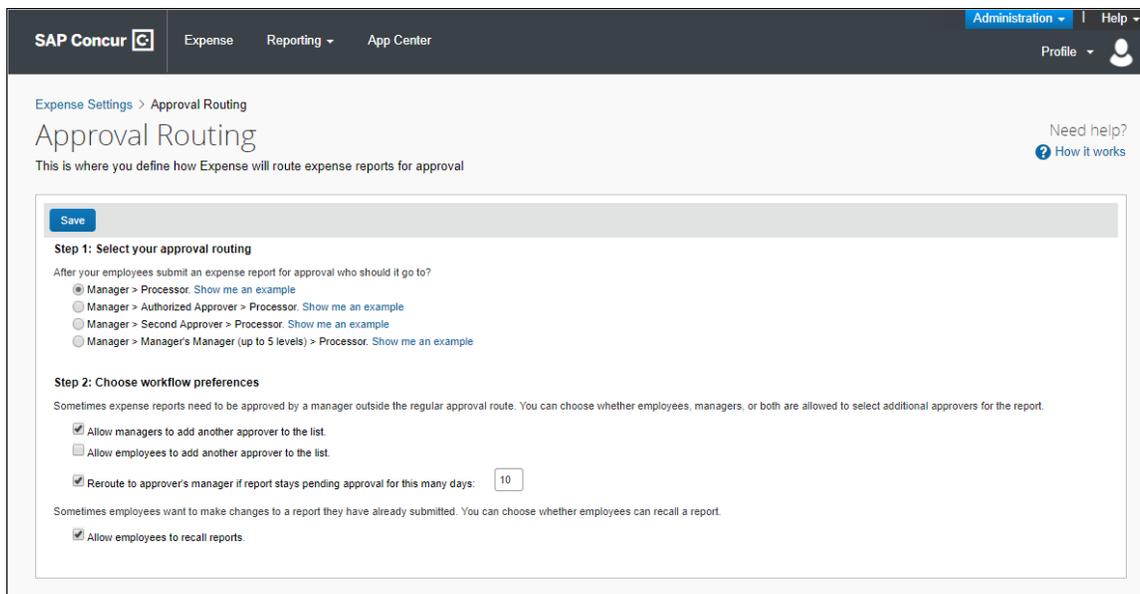
The administrator can also select whether managers and employees can add more approvers to the process. When the report is given the final approval, it is ready to be exported and paid.

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**NOTE:** If you select a manager approval step for your company's workflow, a message appears on the **Approval Routing** page notifying you that you now need to assign a user as the manager approver for each user record on the **Users** page.

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The **Approval Routing** page is also where you configure whether employees will see a **Recall** button when viewing their submitted reports. This functionality is enabled by default. Once recalled, any errors or omissions can be corrected and the report resubmitted, or the report can simply be deleted.



The screenshot shows the SAP Concur Expense Reporting Administration interface. The breadcrumb trail is "Expense Settings > Approval Routing". The page title is "Approval Routing" with a subtitle "This is where you define how Expense will route expense reports for approval". A "Save" button is at the top left of the form area. The form is divided into two steps:

- Step 1: Select your approval routing**  
After your employees submit an expense report for approval who should it go to?
  - Manager > Processor. [Show me an example](#)
  - Manager > Authorized Approver > Processor. [Show me an example](#)
  - Manager > Second Approver > Processor. [Show me an example](#)
  - Manager > Manager's Manager (up to 5 levels) > Processor. [Show me an example](#)
- Step 2: Choose workflow preferences**  
Sometimes expense reports need to be approved by a manager outside the regular approval route. You can choose whether employees, managers, or both are allowed to select additional approvers for the report.
  - Allow managers to add another approver to the list.
  - Allow employees to add another approver to the list.
  - Reroute to approver's manager if report stays pending approval for this many days:Sometimes employees want to make changes to a report they have already submitted. You can choose whether employees can recall a report.
  - Allow employees to recall reports.

## Budget Workflow

If your company has the Budget Workflow feature enabled, you can select to include a budget approval step on the **Approval Routing** page.



For more information about budget approvals, refer to the *Shared: Budget Setup Guide for Standard Edition*.

## Section 2: Types of Approval Routing

This section describes approval routing options and workflow preferences.

### Processor Only

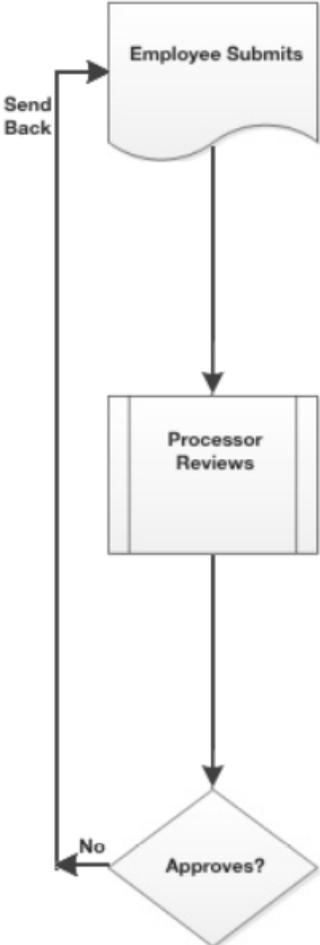
#### Requirements

The processor only option is the default setting. This option simplifies the approval workflow process and eases initial user administration setup. For smaller businesses, this option may be preferred because it removes a duplicate approval process.

Clients can still opt to include a manager approval step in their company's workflow. If you select a manager approval step for your company's workflow, a message appears on the **Approval Routing** page notifying you that you now need to assign a user as the manager approver for each user record on the **Users** page.

**Example – Employee to Processor Workflow**

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to the company's processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*.



**Manager to Processor**

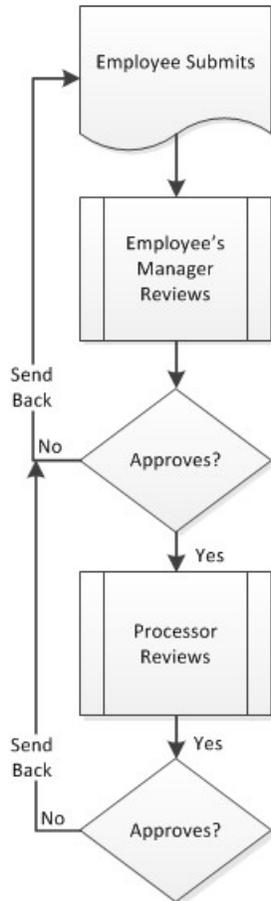
**Requirements**

Each employee must have a manager selected in the **Manager** field on the **Users** page.

**Example – Manager > Processor Workflow**

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to their manager who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The report goes to a processor who

is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*.



## Manager to Authorized Approver to Processor

### Requirements

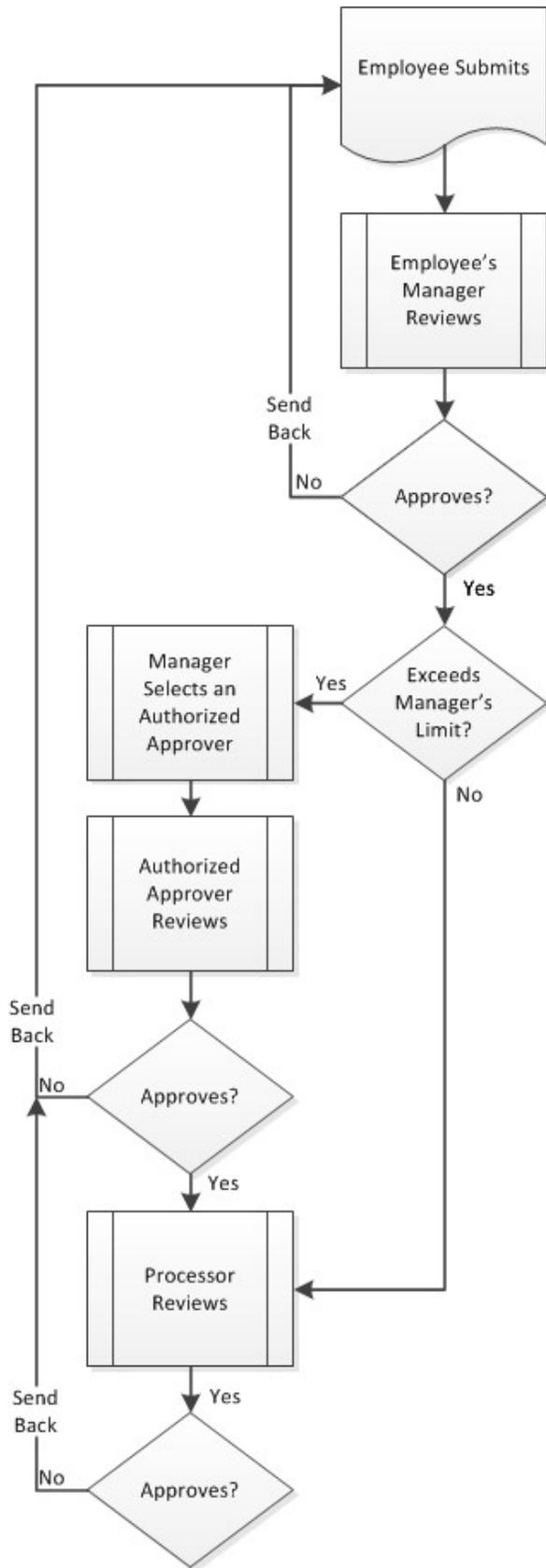
- Each employee must have a manager selected in the **Manager** field on the **Users** page.
- Each manager must have an approval limit entered using the **Can Limit Approve Reports** field on the **Users** page.

### Example – Manager > Authorized Approver > Processor Workflow

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to their manager (Manager A) who has an approval limit of \$300, and who, after careful consideration, clicks **Approve**. Manager A is prompted to make a selection from a list of managers within the company who are configured with an approval limit sufficient to cover this \$500 expense report. Because Manager A's manager does not have a sufficient approval limit to cover this expense report, Manager A will select a different manager. The expense report goes to the selected authorized approver who has an approval limit of \$5000, and who, after careful

consideration, clicks **Approve**. The expense report goes to a processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*.

## Section 2: Types of Approval Routing



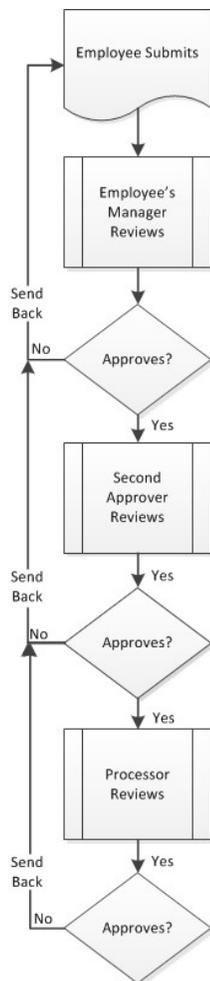
## Manager to Second Approver to Processor

### Requirements

- Each employee must have a manager selected in the **Manager** field on the **Users** page.
- Each employee should have a second approver designated using the **Second Approver** field on the **Users** page. If the employee has no second approver, their approved reports will go from their manager directly to the processor.

### Example – Manager > Second Approver > Processor Workflow

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to their manager who is permitted to approve any amount, and after careful consideration, clicks **Approve**. The report goes to the person who is this submitter's second approver. The second approver is permitted to approve any amount, and after careful consideration, clicks **Approve**. The expense report goes to a processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*.




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**NOTE:** If a second approver exists, and the first approver does not handle an expense report within the configured number of days, then the system will automatically forward the expense report to the second approver.

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## Manager to Manager's Manager to Processor

### Requirements

- Each employee must have a manager selected using the **Manager** field on the **Users** page.
- Each manager must have an amount entered using the **Can Limit Approve Reports** field on the **Users** page.

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**NOTE:** Make sure that the final manager has a very high approval limit so that all reports can be successfully approved. Also make sure that at least one other manager has a very high approval limit so that reports submitted by the final manager can be successfully approved. Remember that no one can approve their own reports.

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### **Example 1 – Manager > Manager's Manager (up to 5 levels) > Processor Workflow**

An employee clicks **Submit Report** for an expense report totaling \$5000. The expense report goes to their manager (Manager A) who has an approval limit of \$100, and who, after careful consideration, clicks **Approve**. The expense report goes to the manager's manager (Manager B) who has an approval limit of \$200, and who, after careful consideration, clicks **Approve**. The expense report goes to Manager B's manager (Manager C) who has an approval limit of \$300, and who, after careful consideration, clicks **Approve**. The expense report goes to Manager C's manager (Manager D) who has an approval limit of \$4000, and who, after careful consideration, clicks **Approve**. The expense report goes to Manager D's manager (Manager E) who has an approval limit of \$5000, and who, after careful consideration, clicks **Approve**. The expense report goes to a processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*.

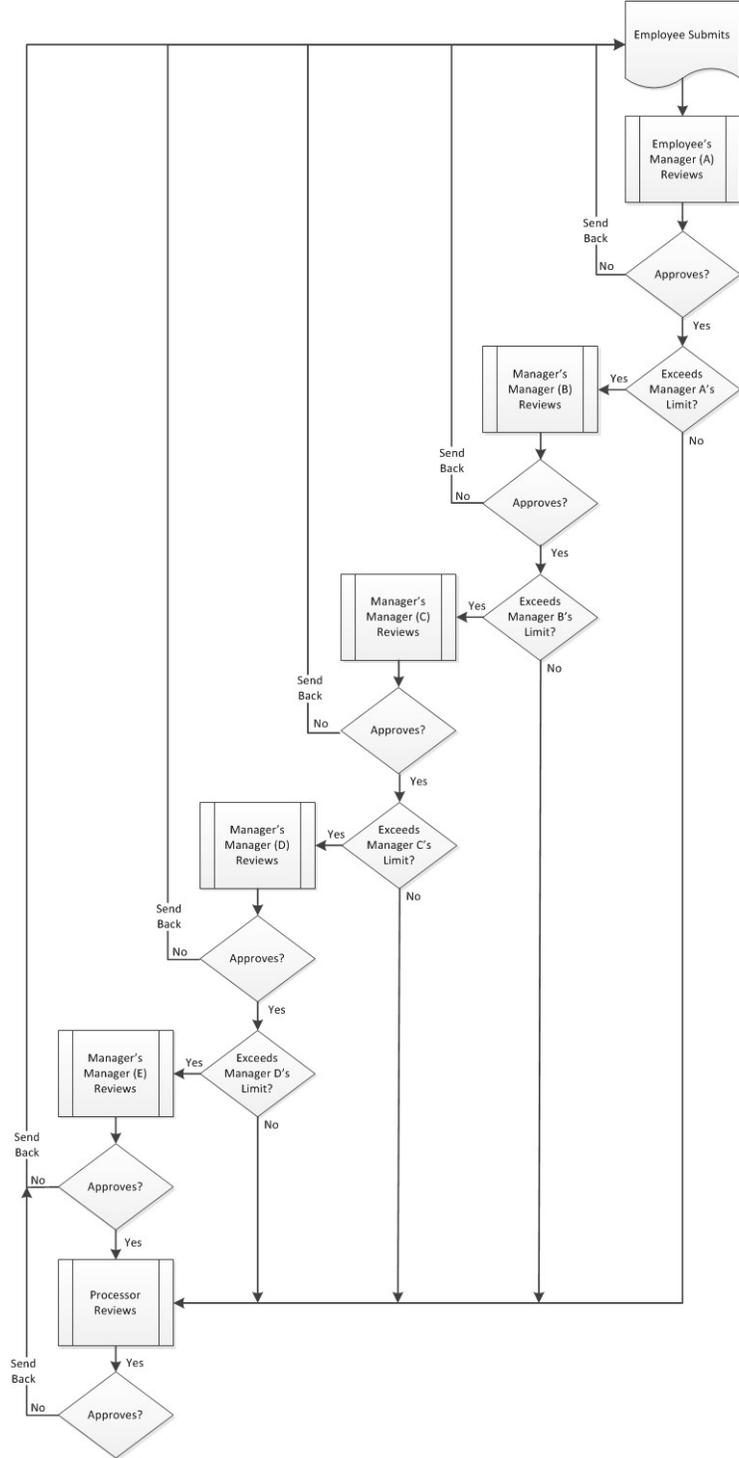
### **Example 2 – Manager > Manager's Manager (up to 5 levels) > Processor Workflow**

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to their manager (Manager A) who has an approval limit of \$600, and who, after careful consideration, clicks **Approve**. The expense report goes to a processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*. While the approval routing was configured to accommodate additional approvers, they were not needed in this example.

### **Example 3 – Manager > Manager's Manager (up to 5 levels) > Processor Workflow**

An employee clicks **Submit Report** for an expense report totaling \$500. The expense report goes to their manager (Manager A) who has an approval limit of \$400, and who, after careful consideration, clicks **Approve**. The expense report goes

to the manager's manager (Manager B) who has an approval limit of \$500, and who, after careful consideration, clicks **Approve**. The expense report goes to a processor who is permitted to approve any amount, and who, after careful consideration, clicks **Approve**. The expense report status is set to *Pending Payment*. While the approval routing was configured to accommodate additional approvers, they were not needed in this example.

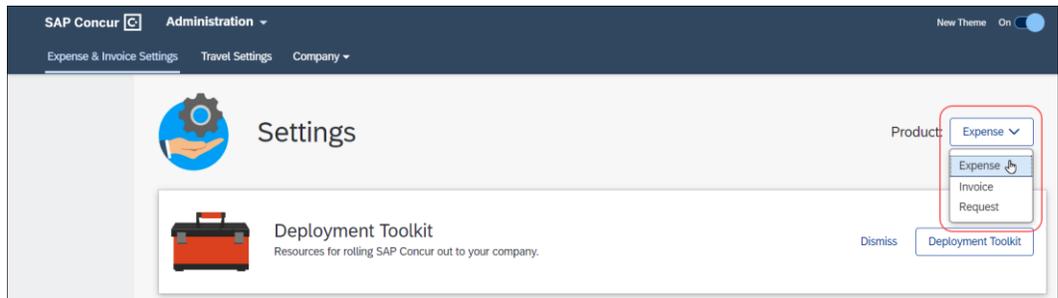


## Section 3: Configuration

### Access the Approval Routing Page

► **To access the Approval Routing page:**

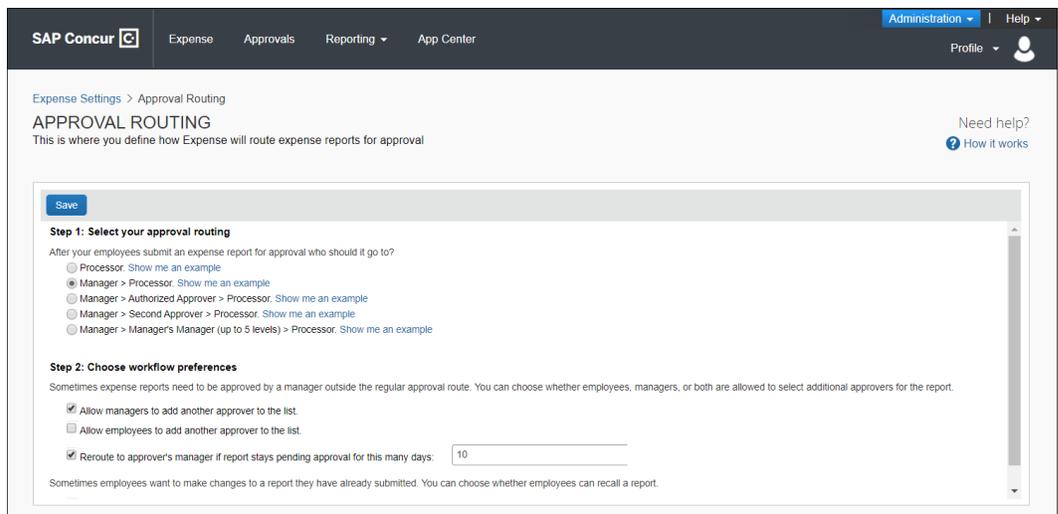
1. Click **Administration > Expense Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Expense*.



3. In the **Policy** section, on the **Expense Approvals** tab, click **Edit**.



The **Approval Routing** page appears.



## Configure Your Approval Workflow

► **To configure your workflow preferences:**

1. On the **Approval Routing** page, fill in the fields:

Field	Description
Choose whether to allow additional approvers	Choose whether managers and employees can add more approvers to the report approval route. If you select this option, the manager or employee sees a button after approving or submitting that lets them select another approver. The approver they select is added to the approval route after them, and then the report continues on the existing path. The additional approver does not replace the standard approvers.
Choose whether to turn off time outs	Choose whether to turn off approval time outs. This setting is enabled by default to keep expense reports moving through the workflow.  For more information, refer to the <i>Approval Time Out</i> section of this guide.
Choose whether to allow recalls	Choose whether employees can recall submitted expense reports. When allowed (default configuration), employees can edit and resubmit, or delete, expense reports. The expense reports are available for recall any time prior to reaching the <i>Pending Payment</i> status.

2. Click **Save** to save your changes.

## Approval Time Out

The **Reroute to approver's manager if report stays pending for this many days** setting is enabled by default. The default number is 10 calendar days. This field can be modified.

Expense Settings > Approval Routing

### APPROVAL ROUTING

This is where you define how Expense will route expense reports for approval

Need help?  
How it works

Save

**Step 1: Select your approval routing**

After your employees submit an expense report for approval who should it go to?

- Processor. [Show me an example](#)
- Manager > Processor. [Show me an example](#)
- Manager > Authorized Approver > Processor. [Show me an example](#)
- Manager > Second Approver > Processor. [Show me an example](#)
- Manager > Manager's Manager (up to 5 levels) > Processor. [Show me an example](#)

**Step 2: Choose workflow preferences**

Sometimes expense reports need to be approved by a manager outside the regular approval route. You can choose whether employees, managers, or both are allowed to select additional approvers for the report.

- Allow managers to add another approver to the list.
- Allow employees to add another approver to the list.
- Reroute to approver's manager if report stays pending approval for this many days:

Sometimes employees want to make changes to a report they have already submitted. You can choose whether employees can recall a report.

This setting allows the system to take these actions:

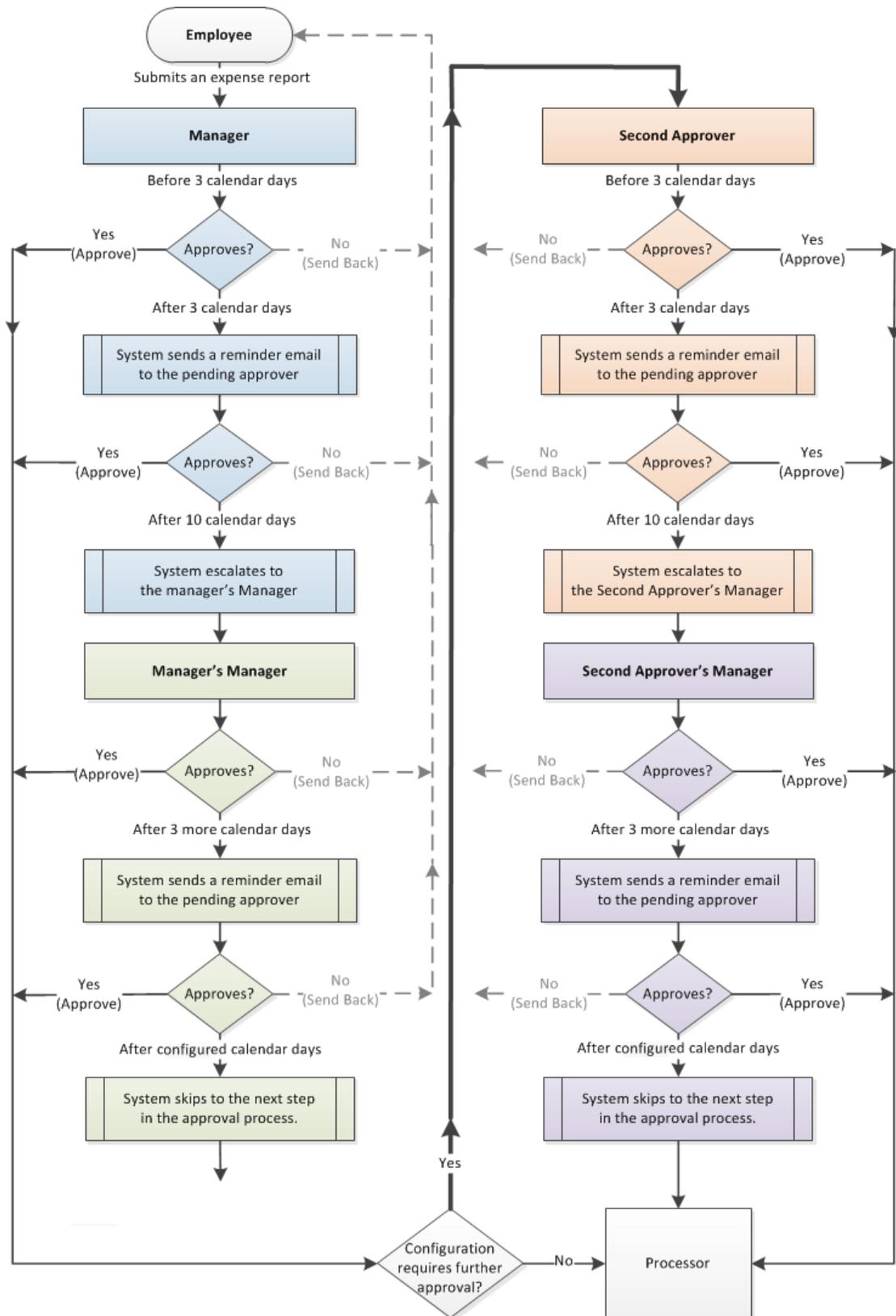
- The system times the approver. This begins when the expense report enters the pending approval workflow step for the approver.
- The system may automatically reassign an expense report. If the timer reaches the configured number of calendar days, the system escalates the expense report to the approver's manager and resets the timer. If the timer again reaches the configured number of calendar days, the system forwards the expense report to the next approver or to the processor.

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**NOTE:** When the system escalates an expense report, the system is including someone in the approval process that might not otherwise be involved. When the system forwards an expense report, the system is skipping an approver and assigning the report to the next person who would have eventually received it for approval.

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**Workflow Conceptual Diagram**



## EXAMPLE TIME OUTS

### SUBMITTER > MANAGER > PROCESSOR

This workflow is available on the **Approval Routing** page in Product Settings. The following section describes how this workflow option is impacted by the Approval Time Out setting.

Expense Settings > Approval Routing

### APPROVAL ROUTING

This is where you define how Expense will route expense reports for approval

Need help? [How it works](#)

[Save](#)

**Step 1: Select your approval routing**

After your employees submit an expense report for approval who should it go to?

- Processor. [Show me an example](#)
- Manager > Processor. [Show me an example](#)**
- Manager > Authorized Approver > Processor. [Show me an example](#)
- Manager > Second Approver > Processor. [Show me an example](#)
- Manager > Manager's Manager (up to 5 levels) > Processor. [Show me an example](#)

**Step 2: Choose workflow preferences**

Sometimes expense reports need to be approved by a manager outside the regular approval route. You can choose whether employees, managers, or both are allowed to select additional approvers for the report.

- Allow managers to add another approver to the list.
- Allow employees to add another approver to the list.
- Reroute to approver's manager if report stays pending approval for this many days:

Sometimes employees want to make changes to a report they have already submitted. You can choose whether employees can recall a report.

If the approver does not approve (or send back) the expense report after 3 calendar days, then the system automatically sends the approver a reminder email.

If the approver does not approve (or send back) the expense report after the configured number of calendar days, then the expense report is automatically escalated by the system to the approver's Manager, or if no Manager is configured, then to the processor.

**NOTE:** An approver's Manager is configured using the **Manager** field on the approver's **Create User** or **Edit User** page:

Expense & Invoice Settings > Users > Create

## Create User

Need help? [How it works](#)

This is where you create a new user. Please fill in the fields marked with a \*, and assign product specific settings as necessary.

[Save](#) [Cancel](#)

Automatically send invite email on save

### User Information

Active

Login (email address) \*  Password \*  Retype Password \*

First Name \*  Last Name \*  Middle Name  Employee ID \*

Email

Country/Region Of Residence \*  State/Province   Exempt from Expense Type Limit rules? Region

Business Unit

Reimbursement Method \*

Invoice User Country  Invoice Policy Group

**Manager**  Invoice Approver  Purchase Request Approver

User Permissions - check all that apply

If the approver's Manager does not approve (or send back) the expense report in 3 days, then the system automatically sends the approver's Manager a reminder email.

If the approver's Manager does not approve (or send back) the expense report in the configured number of calendar days, then the expense report is automatically forwarded by the system to the processor.

## SUBMITTER > MANAGER > SECOND APPROVER > PROCESSOR

This workflow is available on the **Approval Routing** page in Product Settings. The following section describes how this workflow option is impacted by the Approval Time Out setting.

Expense Settings > Approval Routing

### APPROVAL ROUTING

This is where you define how Expense will route expense reports for approval

Need help? [How it works](#)

**Save**

**Step 1: Select your approval routing**

After your employees submit an expense report for approval who should it go to?

- Processor. [Show me an example](#)
- Manager > Processor. [Show me an example](#)
- Manager > Authorized Approver > Processor. [Show me an example](#)
- Manager > Second Approver > Processor. [Show me an example](#)
- Manager > Manager's Manager (up to 5 levels) > Processor. [Show me an example](#)

**Step 2: Choose workflow preferences**

Sometimes expense reports need to be approved by a manager outside the regular approval route. You can choose whether employees, managers, or both are allowed to select additional approvers for the report.

- Allow managers to add another approver to the list.
- Allow employees to add another approver to the list.
- Reroute to approver's manager if report stays pending approval for this many days:

Sometimes employees want to make changes to a report they have already submitted. You can choose whether employees can recall a report.

If the approver does not approve (or send back) the expense report after 3 calendar days, then the system automatically sends the approver a reminder email.

If the approver does not approve (or send back) the expense report after the configured number of calendar days, then the expense report is automatically escalated by the system to the approver's Manager.

**NOTE:** An approver's Manager is configured using the **Manager** field on the approver's **Create User** or **Edit User** page. A Second Approver is configured using the **Second Approver** field on the approver's **Create User** or **Edit User** page.

The screenshot shows the 'Create User' form in SAP Concur. The form is titled 'Create User' and includes a 'Save' button and a 'Cancel' button. Below the buttons, there are several sections of input fields:

- Automatically send invite email on save:** A checked checkbox.
- User Information:** A checked checkbox for 'Active'.
- Login (email address):** A text field containing 'cm@company.com'.
- Password:** A text field with masked characters.
- Retype Password:** A text field with masked characters.
- First Name:** A text field containing 'Chris'.
- Last Name:** A text field containing 'Miller'.
- Middle Name:** An empty text field.
- Employee ID:** A text field containing 'cm@company.com'.
- Email:** A text field containing 'cm@company.com'.
- Country/Region Of Residence:** A dropdown menu set to 'UNITED STATES'.
- State/Province:** A dropdown menu set to 'Washington'.
- Exempt from Expense Type Limit rules?:** An unchecked checkbox.
- Region:** An empty dropdown menu.
- Business Unit:** An empty dropdown menu.
- Reimbursement Method:** A dropdown menu set to 'Company Check (via Accounts)'.
- Invoice User Country:** A dropdown menu set to 'All'.
- Invoice Policy Group:** A dropdown menu with a search box.
- Manager:** A dropdown menu set to 'Admin, Company'.
- Second Approver:** A dropdown menu set to 'No 2nd Approver'.
- Invoice Approver:** A dropdown menu set to 'No Default Manager'.
- Purchase Request Approver:** A dropdown menu set to 'No Default Manager'.

The 'Manager' and 'Second Approver' fields are highlighted with a red box. Below the form, there is a section for 'User Permissions - check all that apply'.

In the event that **Manager** and/or **Second Approver** are blank, those approvers are skipped by the system resulting in the expense report reaching the processor sooner.

If the approver's Manager does not approve (or send back) the expense report in 3 days, then the system automatically sends the approver's Manager a reminder email.

If the approver's Manager does not approve (or send back) the expense report in the configured number of calendar days, then the expense report is automatically escalated by the system to the submitter's Second Approver.

If the Second Approver does not approve (or send back) the expense report in 3 days, then the system automatically sends the Second Approver a reminder email.

If the Second Approver does not approve (or send back) the expense report in the configured number of calendar days, then the expense report is automatically forwarded by the system to the Second Approver's Manager.

If the Second Approver's Manager does not approve (or send back) the expense report in 3 days, then the system automatically sends the Second Approver's Manager a reminder email.

If the Second Approver's Manager does not approve (or send back) the expense report in the configured number of calendar days, then the expense report is automatically forwarded by the system to the processor.

## Section 4: Approval Email Notifications

When an expense report enters the approval queue for a user with the **Can Approve Expense Reports** role, the approver receives a notification email. After 3 calendar days, the approver receives a reminder email. After that, the approver receives daily reminders until they have approved the report.

Approvers can choose whether they receive email notifications when a report is submitted for their approval on the **Expense Preferences** page of Profile.

Users can choose whether they receive email notifications when their report status changes on the **Expense Preferences** page of Profile.

The screenshot displays the Concur Expense Preferences page. The left sidebar contains navigation links for Profile, Personal Information, Change Password, System Settings, and Mobile Registration. The main content area is titled 'Expense Preferences' and includes a 'Save' button and a 'Cancel' button. Below these buttons, there is a section titled 'Send email when...' with three checked options: 'The status of an expense report changes', 'New company card transactions arrive', and 'Faxed receipts are successfully received'. A section titled 'Prompt...' has one unchecked option: 'For an approver when an expense report is submitted'. The footer of the page shows the Concur logo and copyright information: '© Copyright 2015 - Concur - All Rights Reserved'.