

# **Concur Invoice: Workflow – Authorized Approvers Setup Guide**

**Last Revised: February 24, 2020**

Applies to these SAP Concur solutions:

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



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# Revision History

Date	Notes/Comments/Changes
October 27, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
February 17, 2021	Updated the copyright year; no other changes; cover date not updated
April 17, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
February 24, 2020	Updated information about default approver in the <i>Additional Notes</i> section.
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April 13, 2019	Changed the term "payment request" to "invoice" as part of the new user experience for Concur Invoice including images.
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April 22, 2017	Corrected information to identify a zero amount for an approver who may be included in the AA or COA approval chain but may not authorize an amount above zero. This is typically used for a manager who wishes to see/approve the report but does not have any signing authority for any amount in the cost center. An unlimited approval amount is only for a NULL value.
December 14, 2016	Changed copyright and cover; no other content changes.
December 5, 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
May 15, 2015	Updated the images to the enhanced UI and made general updates to the content.
September 16, 2014	Added information about the two user interfaces; no other content changes.
April 16, 2014	Changed copyright and cover; no other content changes.
December 13, 2013	New guide.



# Workflow – Authorized Approvers

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**NOTE:** Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

## Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur staff. In this case, the client must initiate a service request with SAP Concur support.

## Section 2: Workflow Guides

Refer to these guides when configuring and maintaining workflows.

Setup Guide	Description
<i>Concur Invoice: Workflow – General Information</i>	Read this guide for general information about invoice workflows.
<i>Concur Invoice: Workflow – Authorized Approvers</i>	Read this guide if the company uses authorized approvers but only <i>after</i> reading the <i>Concur Invoice: Workflow – General Information Setup Guide</i> .
<i>Concur Invoice: Workflow – Cost Object Approvals</i>	Read this guide if the company uses cost object approvals but only <i>after</i> reading the <i>Concur Invoice: Workflow – General Information Setup Guide</i> .
<i>Concur Invoice: Workflow – Email Notifications</i>	Read this guide if the company uses email notifications for status changes and approval notification but only <i>after</i> reading the <i>Concur Invoice: Workflow – General Information Setup Guide</i> .

## Section 3: Authorized Approvers Overview

An *authorized approver* is a Concur Invoice user with the standard Invoice Approver role *and* special approver permissions:

- **Limit approval:** If the company wants to use limit approval, the administrator assigns each authorized approver an amount limit. The authorized approver can then approve an invoice if the invoice amount is equal to or less than that assigned limit. (Refer to the *Definition of "Amount" for Limit Approval* section below.)
  - and/or –
- **Exception approval:** If the company wants to use exception approval, the administrator defines a minimum and maximum exception level. The authorized approver can approve an invoice if the invoice has an exception level at or between the defined minimum and maximum levels.

An authorized approver can have limit approval, exception approval, or both. A workflow can combine one or more standard Invoice approvers and one or more authorized approvers. In addition, the administrator has many more options with which to customize the Authorized Approver feature – workflow conditions, workflow level filters, and ad hoc steps – to meet the needs to the company, as described in this guide.

### ***Setting an Unlimited Approval Amount***

When configuring the approver, a limit amount of null will result in an unlimited approval/no limit approval amount.

### ***Definition of "Amount" for Limit Approval***

The "amount" that is used to locate the appropriate authorized approver (limit approval) is the *requested/approved* amount. Whether the amount is *requested* or *approved* depends on where the invoice is in the workflow. When the user submits the invoice – before it has been approved – the "amount" is the sum of the entries on the invoice. After approval, the "amount" is the approved amount.

Example: Assume that the user submits an invoice for 1,000.00 and the first approver is a "limit" authorized approver; the system locates the appropriate authorized approver using the amount of 1,000.00. Further, assume that the approver approved only 900.00. If the next step in the workflow requires another "limit" authorized approver, the system locates one using the amount of 900.00.

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**NOTE:** To have the invoice go directly to the approver with the appropriate limit, be sure to select the **Restrict approvers to those with limit authority** check box when defining the workflow step. Refer to *Add/Edit the Workflow Options, Workflow Steps, Workflow Rules* in this guide for more information.

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## **Delegates**

When a delegate is acting on behalf of an authorized approver, the delegate inherits the authority of that authorized approver, including that authorized approver's limits (if any), currencies, and exception authority (if any).



For more information, refer to the *Shared: Delegate Configuration Setup Guide*.

## Approval Status Flags

Concur Invoice has two status flags that indicate if the invoice was approved by an authorized approver:

- *Limit Approved* flag for limit approvals
- *Exception Approved* flag for exception approvals

Concur Invoice sets the flag to No at the beginning of the workflow. It is changed to Yes only when the invoice is approved by an authorized approver who has the appropriate authority. If the invoice is returned to the employee, then the flag is reset to No.

The flag is merely an indicator; it does not affect the workflow or guarantee approval by an authorized approver. To ensure that an invoice is not paid without approval by an authorized approver, the administrator must define *workflow rules* based on this flag. For example, the administrator can create a workflow rule to perform an action (such as send the invoice back to the employee or generate an exception) if the flag is still set to No when it reaches Accounting Review (in Invoice Processor).

## How the System Determines Which Approver an Employee Uses

To determine the appropriate approver:

1. Concur Invoice first follows the steps regarding default approvers as described in *Concur Invoice: Workflows – General Information Setup Guide* to identify the default approver.
2. Concur Invoice next looks at the configuration for the workflow step to see if it is an authorized approver step.
  - ◆ If **No**: The invoice proceeds to the default approver. If no default approver exists, the user may select from the list of regular approvers.
  - ◆ If **Yes**: Concur Invoice evaluates the default approver to see if they are an authorized approver.
    - If **No**: Concur Invoice searches for authorized approvers at the appropriate level in the hierarchy and may prompt the user to search for an approver.
    - If **Yes**: Concur Invoice checks to see whether the step is configured to require limit-based or exception-based approvers.
      - \* If **No**: The invoice proceeds to the default approver. If no default approver exists, Concur Invoice searches for authorized approvers at the appropriate level in the hierarchy *without regard for the amount or exception limits for the approvers.* \*\*
      - \* If **Yes**: The default approver is evaluated to see if they are an authorized approver at the right point in the hierarchy with the

appropriate limit. (If a default approver does not exist, then the **No** path is followed.)

- If **No**: Concur Invoice searches for authorized approvers at the appropriate level in the hierarchy who have sufficient amount or exception limits to approve the invoice. \*\*
- If **Yes**: The invoice proceeds to the default approver.

\*\* When Concur Invoice searches for approvers:

- If no approver is found, Concur Invoice searches at the next level *higher* in the hierarchy – repeating this process until an approver is found.
- If one approver is found, the invoice is routed to that approver.
- If more than one approver is found, the user is prompted to select an authorized approver from the list of available, qualified authorized approvers. The invoice is then routed to the selected approver.
- If the workflow is configured to use the default approver lookup to find the authorized approver, Concur Invoice will search up the default approver chain for an authorized approver with the correct limit authority and send the invoice straight to that approver.



For more information, refer to the *Find Authorized Approver Using Default Approver Lookup* section of this guide.

## Filter Authorized Approvers by Workflow Approval Step

As described above, the system determines the available authorized approvers based on criteria such as the authorized approver hierarchy, the limit assigned to the approver, the range of rule exceptions, and workflow rule conditions.

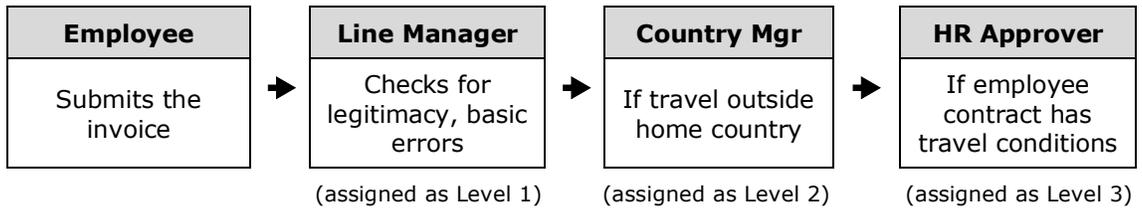
The administrator can also filter the available authorized approvers based on the workflow approval step. For example, the company may want certain approvers at the first approval step in the workflow but not at the remaining approval steps. The company can assign a "level" number to a workflow step and assign that same "level" number to an authorized approver. Therefore, if the company assigns level 1 to the first workflow approval step and assigns level 1 to each line manager, then line managers are available as authorized approvers only for the first approval step.

Administrators can use the "level" filter to enhance the company's existing configuration or in lieu of the existing configuration. This feature is simply a filter that can be added at any workflow approval step.

### Example

Assume that instead of creating complicated workflows with intricate conditions and other criteria, the company simply assigns levels to the workflow steps and to the authorized approvers.

For example, the company assigns these levels to these workflow approval steps:



The company assigns these levels to the approvers:

Name	Level
John (default approver)	1
Fred	1
Crystal	2
Susan	3
Terry	
Vic	3

In this case:

- For the Line Manager step (1), both John and Fred can approve at level 1 but since John is the default approver, then John is automatically selected as the approver.
- For the Country Manager step (2), Crystal is the only option.
- For the HR Manager step (3), the user selects between Susan and Vic.
- Since Terry is not assigned a level, then Terry will never be used in this workflow.

Note the following:

- Not all workflow steps must be assigned a level. However, note that *all* authorized approvers will be available for those steps not assigned a level (assuming there is no other criteria to exclude the approver like limit, exception, hierarchy, etc.). For example, if the final workflow step above (HR Approver) was not assigned a level, then all approvers would be available.

In summary:

- ◆ Approvers assigned a level can approve at the level they match.
- ◆ If every approval step is assigned a level but an approver is not assigned a level or does not match any level, then that approver will not be available in that workflow.
- ◆ If any approval step is not assigned a level, all approvers are available - regardless of the level assigned to the approver (assuming there is no other excluding criteria).

- If an authorized approver must be available for more than one level (like levels 1 and 2), then there must be two records for that approver – one for each level.

**IMPORTANT:**

- ◆ Each section of the authorized approver hierarchy will accept *only one* level per user, so each level must be assigned at different sections of the hierarchy.
- ◆ The levels can be added to users via the Employee Import or the Authorized Approver list (**Administration** > **Invoice** > **Workflows** > **Authorized Approver** tab).
- ◆ Levels cannot be added to approvers via User Administration.

***Configuration of the "Level" Filter***

For information about configuring the levels, refer to the *Configure the "Level" Filter* section in this guide.

## Find Authorized Approver Using Default Approver Lookup

### Overview

A workflow can be configured to use the default approver chain to find an authorized approver. The option is on the **Workflows** page (in Step 1) labeled **Use default approver lookup to find authorized approver**.

The screenshot shows the 'Workflows' configuration page with the 'General' tab selected. The 'Use default approver lookup to find authorized approver' checkbox is checked and highlighted with a red circle. Other visible settings include:

- Workflow Type: Payment Request
- Workflow Name: Level
- Require Hardcopy Receipts:
- Approval Time Expired Action: No Action
- Expiration Email To Approver: None
- Assignment Timeout Action: No Action
- Do not display the skip steps to the employee:
- Only display approvers at or above the current approver's level:
- Steps Can Be Added By: Both Employee and Approver
- Allow ad-hoc steps after final processor step:

When selected, the authorized approval workflow step will select the next approver within the user's default approver chain that has the required limit approval to approve the invoice. The other approvers in the chain that do not have authority to approve the invoice amount will not receive the invoice in their approval queue.



For a complete definition of "amount" as it relates to limit approvals, refer to *Definition of "Amount" for Limit Approval* in this guide.

Please note the following about this feature:

- The workflow can only contain one Authorized Approval step when using this option.
- The approver field for the Authorized Approval step should not be editable by the user or approver.
- If user-added steps are enabled, they should not be set as Authorized Approval steps.
- This feature does not apply to the Cost Object Approval step.

- This feature works best with a flat (no levels) hierarchy. If levels exist, default approvers may be disqualified as appropriate approvers for the invoice when they are not authorized approvers in the appropriate place in the hierarchy.

**Examples**

**WORKFLOW CONFIGURATION**

Step 1 – Regular Approver

Step 2 – Department Manager

Step 3 – Authorized Approver

Step 4 – Processor

**AUTHORIZED APPROVER TABLE**

Approver	Limit	Default approver for this user
A1	100	A2
A2	1000	A3
A3	5000	C10
C1	100	C2
C2	1000	C3
C3	5000	C10
C10	Unlimited	

**EXAMPLE 1**

Employee submits an invoice for \$4,000.00. Employee’s default approver is A1.

Workflow Step	Type	Role	Approver	Logic
1	Regular Approver	Line Manager	A1	Invoice goes to A1, employee’s default approver.
2	Regular Approver	Department Manager	A2	Invoice goes to A2, A1’s default approver

Workflow Step	Type	Role	Approver	Logic
3	Authorized Approver	Signing Manager	A3	Authorized Approver resolution starts with A1, the employee's default manager. A1 has insufficient authority and is discarded. A1's default manager is evaluated next. A2 has insufficient authority and is discarded. A2's default manager is evaluated next. A3 has sufficient signing authority and is assigned to this step.
4	Processor	Processor		

**EXAMPLE 2**

Employee submits an invoice for \$12,000.00. Employee's default approver is A1.

Workflow Step	Type	Role	Approver	Logic
1	Regular Approver	Line Manager	A1	Invoice goes to A1, employee's default approver.
2	Regular Approver	Department Manager	A2	Invoice goes to A2, A1's default approver
3	Authorized Approver	Signing Manager	C10	Authorized Approver resolution starts with A1, the employee's default manager. A1 has insufficient authority and is discarded. A1's default manager is evaluated next. A2 has insufficient authority and is discarded. A2's default manager is evaluated next. A3 has insufficient authority and is discarded. A3's default manager is evaluated next. C10 has sufficient signing authority and is assigned to this step.
4	Processor	Processor		

### **Additional Notes**

The assigned approver is re-evaluated at the point in time that the invoice enters the authorized approver step. If the approver data has changed since submission, the assigned approver may also change.

- If the default approver for the employee or any approver in the lookup path has been changed, the client must resubmit the invoice.
- If an approver has been inactivated, that approver is no longer eligible to approve the invoice.
- If a default approver has been removed *and not replaced* (blank field) from one of the user profiles in the lookup path *AND* that approver was previously selected as the authorized approver, that approver will still be used so that the invoice continues to move through the workflow.



For more information, refer to the *Using the Default Approver Hierarchy for Authorized Approvers* topic in the Configuration section of this guide.

## **Section 4: Configuration**

Note the following:

- For limit-based authorized approvers:
  - ◆ The amount can differ by approver.
  - ◆ The amount is set for each approver in the Authorized Approver List, in User Administration, or in the employee import.



For a complete definition of "amount" as it relates to limit approvals, refer to *Definition of "Amount" for Limit Approval* in this guide.

- For exception-based authorized approvers:
  - ◆ The minimum/maximum exception range applies to all exception-based authorized approvers.
  - ◆ The range is set in **Administration > Invoice > Workflows > Authorized Approver** tab.

## Global Group vs Authorized Approver Hierarchy

The steps to configure authorized approvers differs depending upon whether the company uses *only* the global group or uses the authorized approver hierarchy. The following table shows the similarities and the differences with a full description on the following pages.

#	Step	Global group only	Authorized Approver hierarchy
1	Define the Invoice Authorized Approver hierarchy: <ul style="list-style-type: none"> <li>Set up the hierarchy.</li> <li>Create a connected (multi-level) list of the hierarchy levels.</li> </ul>		X
2	Activate the Authorized Approver feature: <ul style="list-style-type: none"> <li>Activate the feature.</li> <li>For exception-based approval configurations, define the upper and lower exception level.</li> </ul>	X	X
3	Add/Edit the workflow, workflow steps, and workflow rules to require authorized approvers: <ul style="list-style-type: none"> <li>For each workflow step that requires an authorized approver, change the role of the person completing the step to Authorized Approver.</li> <li>Indicate whether the step requires limit or exception approval.</li> <li>If users are permitted to insert ad hoc approval steps, edit the workflow to restrict those steps to authorized approvers.</li> </ul>	X	X
4	Assign the proper rights to users using one or more of these: <ul style="list-style-type: none"> <li>Authorized Approver List</li> <li>Employee import</li> <li>User Administration</li> </ul>	X	X

### Step 1: Define the Invoice Authorized Approver Hierarchy

#### *Understand the Hierarchy*

The *authorized approver hierarchy* defines the invoices that an authorized approver may approve by the level in a hierarchy. You must define the authorized approver hierarchy (**Invoice > Feature Hierarchies**) and import/create its associated source list before the authorized approver feature can be activated.

By default, the Request Authorized Approver hierarchy uses the Request and Employee fields, such as cost center, project code, division, and so on.



For more information on hierarchies, refer to the *Shared: Feature Hierarchies Setup Guide*.

**Example 1**

Assume that an invoice has a Cost Center as 101 and requires an authorized approver. In this case, Concur Invoice searches its list of authorized approvers for an approver with a Cost Center of 101. If no approvers are found, then it searches the next level up in the authorized approver hierarchy. It continues this process until a level that has approvers is found.

For our example, assume that approvers do exist for Cost Center 101. It then displays all authorized approvers with Cost Centers of 101 regardless of the limit. It is up to the employee or approver to choose the correct authorized approver to move to the next step.

For example, if the data is:

Approver	Company	Cost Center
1	SAP Concur	100
2	SAP Concur	

Then:

- Approver 1 is authorized for SAP Concur Cost Center 100.
- Approver 2 is authorized for any cost center since no cost center is defined.
- If an invoice has Company=SAP Concur, Cost Center=100, then the authorized approver shown for that invoice is Approver 1.
- If the invoice has Cost Center = 200, then only Approver 2 appears on the list.

If none of the criteria match or if no authorized approvers are in the table, then a workflow error occurs. The table below shows an example of the fields and data that the hierarchy for authorized approver is accessing.

**Example 2**

Here is the authorized approver information for another company.

Emp ID	Level 1 = Country	Level 2 = Company	Level 3 = Division	Level 4 = Cost Center	Level 5	Level 6	Level 7	Limit	Exception Approval Authority
1	USA	Acme	Sales	101				1000 USD	No
1	USA	Acme	Sales	102				1000 USD	No
2	USA	Acme	Sales					5000 USD	No

Emp ID	Level 1 = Country	Level 2 = Company	Level 3 = Division	Level 4 = Cost Center	Level 5	Level 6	Level 7	Limit	Exception Approval Authority
3	USA	Acme						10000 USD	Yes
4	Germ	Acme	Ops	201				2000 EUR	No
5	Germ	Acme	Ops	202				2000 EUR	Yes

Employee ID identifies each approver in this table. One approver might be listed multiple times, once for each combination of levels they are authorized to approve. Each row can have a different limit.

For each approver, the system identifies the types of invoices that the approver is authorized to approve based on the hierarchy, limit, and/or exception.

In this example, assume the following:

- The invoice has a Cost Center as 101.
- The invoice requires an authorized approver.
- The invoice total is 1500 USD.



For a complete definition of "amount" as it relates to limit approvals, refer to *Definition of "Amount" for Limit Approval* in this guide.

- The workflow step is configured to restrict options to those approvers who have limits able to approve the invoice.

In this case, Concur Invoice searches its list of authorized approvers for an approver with a Cost Center of 101 *and* with a limit of 1500 USD or greater. If no approvers are found, then it searches the next level up in the authorized approver hierarchy. It continues this process until a level that has approvers is found.

For our example, the approvers found at Cost Center 101 do not have a sufficient authority level to approve the invoice. Concur Invoice then searches Division *Sales* for possible approvers and selects Approver 2.

### **Create Hierarchy and Import Connected List Data**

Create the hierarchy and import or enter the connected (multi-level) list data.



For more information, refer to the *Shared: Feature Hierarchies Setup Guide* and the *Shared: List Management Setup Guide*.

## Step 2: Activate the Authorized Approver Feature

### *Understand the Process*

You must complete one or two actions on this page depending on the type of authorized approvers the company will use. If the authorized approvers will approve invoices based on:

- **For limit only:** Activate the feature. (Then define the actual limit – per approver – using the Authorized Approver List, the employee import, or User Administration.)
- **For exception only:** Activate the feature *and* define the exception limits.
- **For both:** Activate the feature *and* define the exception limits. (Then define the actual limit—per approver—by using the Authorized Approver List, the employee import, or User Administration.)

The screenshot shows the 'Workflows' configuration page in SAP. The 'Authorized Approvers' tab is selected and highlighted with a red circle. Below the tabs, the 'Configuration' sub-tab is also highlighted with a red circle. The page contains a 'Save' button and a 'Cancel' button. The main configuration area includes a checkbox labeled 'Authorized Approver feature is available for workflows:' which is checked. Below this, there are two input fields: 'Minimum Exception Level:' with the value '3' and 'Maximum Exception Level:' with the value '12'.

### *Procedure*

▶ **To use the Configuration tab:**

1. Click **Administration** > **Invoice** > **Workflows** (left menu). The **Workflows** page appears.
2. Click the **Authorized Approvers** tab.

- Click the **Configuration** tab.

- To activate the feature, select **Authorized Approver feature is available for workflows**.
- To define exception limits:

Field	Description
Minimum Exception Level	Enter the minimum exception level that authorized approvers can approve.
Maximum Exception Level	Enter the maximum exception level that authorized approvers can approve.

- Click **Save**.

### Step 3: Add/Edit the Workflow Options, Workflow Steps, Workflow Rules

#### ***Understand Ad Hoc Steps***

If users are permitted to insert ad hoc approval steps, you can edit the workflow to restrict those steps to authorized approvers.

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**NOTE:** The workflow options you need to make these choices do not appear in Workflow until you have selected **Authorized Approver feature is available for workflows** on the **Configuration** tab of the **Authorized Approvers** tab.

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## Restrict Ad Hoc Steps to Authorized Approvers

▶ **To restrict ad hoc steps to authorized approvers:**

1. Click **Administration** > **Invoice** > **Workflows** (left menu). The **Workflows** page appears.
2. On the **Workflows** tab, either:
  - ◆ Select the desired workflow and click **Modify**.
  - or –
  - ◆ Double-click the desired workflow.
3. On the **1 General** page, make the desired changes:

The screenshot shows the 'Workflows' configuration page with the 'General' tab selected. A red circle highlights the 'Restrict Authorized Approver for' dropdown menu, which is currently set to 'All Employee-Editable steps'. Other visible options include 'Restrict approvers to those with limit authority for employee-added steps' and 'Restrict approvers to those with exception authority for employee-added steps'.

Field	Description
Restrict Authorized Approver for	Select one of these: <ul style="list-style-type: none"> <li>• None of the steps</li> <li>• All Employee-Editable steps</li> <li>• Final Employee-Editable step</li> </ul>
Restrict approvers to those with limit authority for employee-added steps	Select this check box for limit-based approvers.
Restrict approvers to those with exception authority for employee-added steps	Select this check box for exception-based approvers.

## Understand Steps and Workflow Rules

The following are some examples of workflows you might create.

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**NOTE:** Some of the examples are based on certain custom fields that are not part of the default configuration. To create custom fields, refer to the *Concur Invoice: Forms and Fields Setup Guide*.

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### Example 1

Assume that the company has assigned default approvers and the workflow needs to have an authorized approver of limits to 1000 USD and limits to 5000 USD. The company can set up a workflow rule that states that an invoice should first be routed to the default approver and then go to the authorized approver.

However, if the amount is below the first authorized approver limit (for example, 500 USD), assume that the company does not want the invoice to go to the second authorized approver. You can create a rule that says:

**Condition:** If LimitApproved equals Yes,

**Action:** Then skip this step.

### Condition

The screenshot shows the 'Edit Condition' dialog box. The title bar says 'Edit Condition' with a close button (X). The 'Name' field contains 'Skip Vendor Approval if Vendor Is Appi'. The 'Force Evaluation' checkbox is checked. Below this, there are 'Insert' and 'Remove' buttons. A list of conditions is shown with a small square icon to the left of each. The first condition is selected. It consists of a dropdown menu (currently empty), a text field containing 'Vendor Remittance Address', a dropdown menu (currently showing 'Is Approved'), a text field containing 'Equal', a dropdown menu (currently showing 'Value'), a text field containing 'Yes', and an empty text field. At the bottom right, there are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

## Action



Dialog box titled "Edit Action" with a close button (X) in the top right corner. The "Action Name:" field contains "Skip Step". The "Message:" field contains the text: "The authorized approver step is skipped. This payment request is limit approved." At the bottom right, there are "Save" and "Cancel" buttons.

### Example 2

The administrator might also write a rule that routes the invoice to an authorized approver with limit authority before the invoice goes to the processor. If no one with limit authority approved the invoice by the time the invoice has gone to the processor, then an exception is given that prevents the invoice from continuing in the workflow:

**Condition:** If LimitApproved equals No,

**Action:** Then generate an exception or send an email.

### Create an Authorized Approver Step

Assume in this example, we will add an authorized approver step between the standard approval step and the Invoice processor step.

#### ► To create an authorized approver step:

1. Click **Administration** > **Invoice** > **Workflows** (left menu). The **Workflows** page appears.
2. On the **Workflows** tab, either:
  - ◆ Select the desired workflow and click **Modify**.  
– or –
  - ◆ Double-click the desired workflow.

3. On the **2 Steps** page, click **New**. The **Add Workflow Step** window appears.

**Add Workflow Step** ✕

Step Name:    
 ! This field is required

Role:  ▼

Approver Editable By:  ▼

Deletable By:  ▼

Initial Status:  ▼

Approval Actions:  ▼

Email Employee when step is complete:

Can exit step with blocking exceptions:

4. In the **Role** field, select *Authorized Approver*. Two new check boxes appear.

**Add Workflow Step** ✕

Step Name:    
 ! This field is required

Role:  ▼

Restrict approvers to those with limit authority:

Restrict approvers to those with exception authority:

Approver Editable By:  ▼

Deletable By:  ▼

Initial Status:  ▼

Approval Actions:  ▼

Authorized Approver Level:

Email Employee when step is complete:

Can exit step with blocking exceptions:

- ◆ Select **Restrict approvers to those with limit authority** to limit the type of authorized approver.
- ◆ Select **Restrict approvers to those with exception authority** to limit the type of authorized approver.

---

**NOTE:** If neither of these is checked, any approver may be used for the step, but the limit-approved or exception-approved indicator will be set **only** if the approver is authorized.

---

5. The **Authorized Approver Level** field also appears. Enter the number that matches the associated authorized approvers.



For information about levels, refer to the *Filter Authorized Approvers by Workflow Approval Step* in this guide.

6. Complete all other fields as desired.



For information about these fields, refer to the *Concur Invoice: Workflows – General Information Setup Guide*.

7. Click **Save**.

8. Create any desired workflow rules on the  **Step Rules** page.



For information about creating workflow rules, refer to the *Concur Invoice: Workflows – General Information Setup Guide*.

### **Using the Default Approver Hierarchy for Authorized Approvers**

You can configure the workflow to use the default approver chain to search for an authorized approver. This setting pre-empts the following workflow step settings:

- Only display approvers at or above the current approver’s level
- Restrict approvers to those with limit authority for employee-added steps

▶ **To use the default approver hierarchy to find authorized approvers:**

1. Select the workflow to update on the **Workflows** page.
2. Click **Modify**.

3. Select the **Only display approvers at or above the current approver's level** and the **Use default approver lookup to find authorized approver** check boxes on the **General** step.

The screenshot shows the 'Workflows' configuration interface. The 'General' step is selected. The 'Workflow Type' is 'Payment Request' and the 'Workflow Name' is 'Level'. The 'Only display approvers at or above the current approver's level' checkbox is checked, and the 'Use default approver lookup to find authorized approver' checkbox is also checked. Other options include 'Require Hardcopy Receipts', 'Approval Time Expired Action', 'Expiration Email To Approver', 'Assignment Timeout Action', 'Steps Can Be Added By', and 'Allow ad-hoc steps after final processor step'.

4. Click **Done**.



For more information about this feature, refer to the *Find Authorized Approver Using Default Approver Lookup* section of this guide.

## Step 4: Assign the Proper Rights to Users

There are three ways to enter and define authorized approvers in Invoice:

- Enter the approvers manually using the Authorized Approver List
- Use the employee import
- Assign the permissions manually in User Administration

**Regardless of how the authorized approvers are entered into Invoice, they all appear in the Authorized Approver List.**

---

**NOTE:** If you are assigning "levels" to authorized approvers, refer to *Filter Authorized Approvers by Workflow Approval Step* in this guide.

---

## Authorized Approver List

Using this page, for *all* authorized approvers, identify:

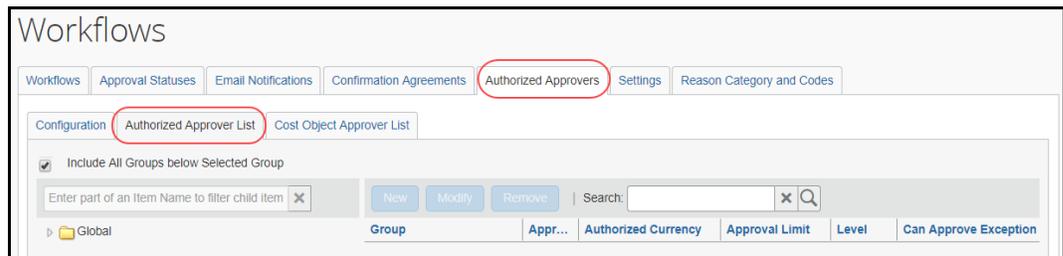
- The group for which the approver will approve invoices
- The approver's name

Then:

- **For limit-only approvers:** Define the limit amount.
- **For exception-only approvers:** Indicate that the approver can exception approve.
- **For both:** Define the limit amount *and* indicate that the approver can exception approve.

▶ **To add authorized approvers:**

1. Click **Administration > Invoice > Workflows** (left menu). The **Workflows** page appears.
2. Click the **Authorized Approvers** tab.
3. Click the **Authorized Approver List** tab.



4. On the left side of the page, select the  icon to expand the desired group.



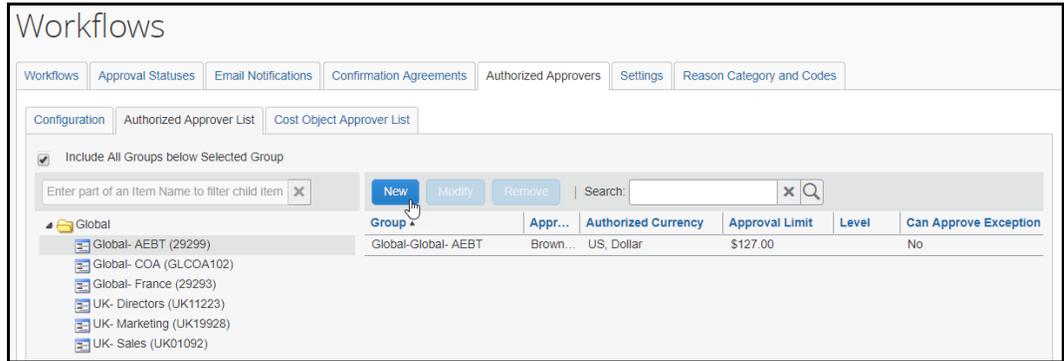

---

**NOTE:** The groups that appear here are from the Authorized Approver Hierarchy.

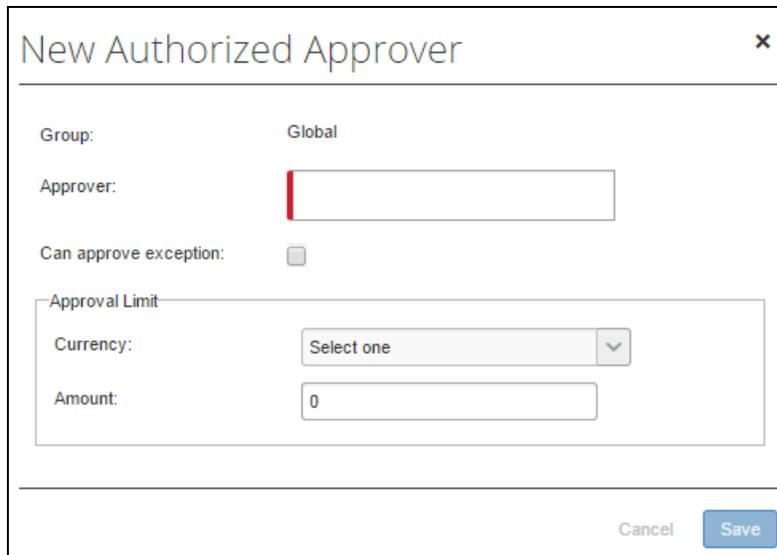
---

5. Select the group that is associated this authorized approver.

- On the right side of the page, click **New**.



The **New Authorized Approver** window appears.



- Complete all appropriate fields.

Field	Description
Approver	Select an approver.
Can approve exception	Select the check box to give this authorized approver exception approval.

Field	Description
Approval Limit	<p>If you want this authorized approver to have limit approval, select the currency and the amount. If they are to have unlimited approval, set to no approval limit currency, and leave the approval limit amount blank.</p> <p>The limit is an upper limit, meaning that they can approve up to this amount.</p> <p><b>NOTE:</b> You can enter 0 in the <b>Approval Limit</b> field. This puts the approver into the authorized approver workflow but will prevent that approver from having final authority to approve the invoice (cannot limit-approve). They can approve the invoice to move it forward in the workflow but, since the Limit Approved status is not changed, the invoice moves to the next authorized approver or processor – depending on how the workflow is designed. For example, it allows a first-line supervisor to view (and be aware of) the invoices their staff is submitting but does not let that person have final approval. In addition, you can, if desired, create workflow rules based on the Limit Approved flag.</p> <p> For a complete definition of "amount" as it relates to limit approvals, refer to <i>Definition of "Amount" for Limit Approval</i> in this guide.</p>
Level	<p>The <b>Level</b> field appears if levels have been assigned to a workflow approval step. To use the <b>Level</b> field, refer to <i>Filter Authorized Approvers by Workflow Approval Step</i> in this guide.</p>

8. Click **Save**.

### **Employee Import**

You can use the employee import to assign the proper authorized approver rights to users.



For more information, refer to the *Shared: Employee Import Specification*.

### **User Administrator**

The settings that appear in User Administration (**Administration > User Administration**) differ depending on whether the configuration includes:

- The Global group only
- At least one level in the Authorized Approver Hierarchy

## GLOBAL GROUP ONLY

If the Authorized Approver feature is activated *and* the company has only one group (Global), then the **Authorized Approver** check box appears in the **Expense and Invoices Setting** section in **Administration > Company > Company Admin > User Administration**.

**Expense and Invoice Settings**

[Approvers](#)
[Expense Preferences](#)
[Invoice Preferences](#)
[Expense Delegates](#)
[Invoice Delegates](#)
[Purchase Request Delegates](#)

Country of Residence: UNITED STATES  
 State/Province: Select one  
 Ledger: DEFAULT  
 Reimbursement Currency: US, Dollar  
 Cash Advance Account Code: 10799  
 Org Unit 1-Division:   
 Org Unit 2-Department:   
 Org Unit 3-Region:   
 Default Language: English (United States)  
 Authorized Approver  
 Manager Approval Limit: 100  
 Approval Limit Currency: US, Dollar

Note the following:

- In order to see the check box described here, the user must have the User Admin rights *and* the Invoice User Administration rights.
- This method is used only for limit-based authorized approvers. It cannot be used for exception-based authorized approvers.

When the administrator selects the check box, the **Manager Approval Limit** field and the **Approval Limit Currency** list appear. The administrator makes the appropriate choices and clicks **Save**.

---

**NOTE:** You can enter 0 in the **Manager Approval Limit** field. This puts the approver into the authorized approver workflow but will prevent that approver from having final authority to approve the invoice (cannot limit-approve). They can approve the invoice to move it forward in the workflow but, since the Limit Approved status is not changed, the invoice moves to the next authorized approver or processor – depending on how the workflow is designed. For example, it allows a first-line supervisor to view (and be aware of) the invoices their staff is submitting but does not let that person have final approval. In addition, you can, if desired, create workflow rules based on the Limit Approved flag.

---

## AUTHORIZED APPROVER FEATURE HIERARCHY

If the Authorized Approver feature is activated *and* the company's Authorized Approver hierarchy has at least one level (in addition to Global), then the **Authorized Approval Limits** link appears in the **Expense and Invoices Setting** section in **Administration > Company > Company Admin > User Administration**.

The screenshot shows the 'Expense and Invoice Settings' page. In the top navigation bar, the link 'Authorized Approval Limits' is circled in red. Other navigation links include 'Approvers', 'Expense Delegates', 'Invoice Delegates', 'Expense Preferences', 'Purchase Request Delegates', 'Invoice Preferences', and 'Company Car'. The main settings area contains various dropdown menus and input fields for user configuration, such as 'Country of Residence' (UNITED STATES), 'State/Province' (Select one), 'Ledger' (DEFAULT), 'Reimbursement Currency' (US, Dollar), and 'Cash Advance Account Code' (10799).

**NOTE:** To see the link described here, the administrator must have the User Admin rights *and* the Invoice User Administration rights. In addition, the employee must be an approver.

The administrator clicks the link. The **Authorized Approval Limits** window appears.

The screenshot shows the 'Authorized Approval Limits' window. At the top, it says 'Authorized Approver Type: Invoice Authorized Approver'. Below that is a search filter: 'Filter: Enter part of an Item Name to filter child item'. On the left, there is a tree view showing a hierarchy of approval levels under 'Global', including 'Global- AEBT (29299)', 'Global- COA (GLCOA102)', 'Global- France (29293)', 'UK- Directors (UK11223)', 'UK- Marketing (UK19928)', and 'UK- Sales (UK01092)'. On the right, there are configuration options: 'Can approve exception:' with a checkbox, and 'Approval Limit' with a 'Currency:' dropdown set to 'US, Dollar' and an 'Amount:' input field containing '127'. At the bottom right, there are 'Delete', 'Cancel', and 'Save' buttons.

On the left side, the administrator selects the appropriate level in the hierarchy.

On the right side:

- For exception approvers, the administrator selects the **Can approve exception** check box. (The actual exception levels apply to all authorized approvers and are defined on the **Authorized Approvers** tab in Workflows.)
- For limit approvers, the administrator selects the desired currency and enters the amount.



For a complete definition of "amount" as it relates to limit approvals, refer to *Definition of "Amount" for Limit Approval* in this guide.

---

**NOTE:** You can enter 0 in the **Amount** field. This puts the approver into the authorized approver workflow but will prevent that approver from having final authority to approve the invoice. They can approve the invoice to move it forward in the workflow but, since the Limit Approved status is not changed, the invoice moves to the next authorized approver or processor – depending on how the workflow is designed. For example, it allows a first-line supervisor to view (and be aware of) the invoices their staff is submitting but does not let that person have final approval. In addition, you can, if desired, create workflow rules based on the Limit Approved flag.

---

- If an approver has both types of approval authority, the administrator defines both.

## Section 5: Configure the Level Filter

Refer to *Filter Authorized Approvers by Workflow Approval Step* in this guide for information about this feature.

### Step 1: Assign the Level to the Workflow Step

To assign the level to the workflow step:

1. Click **Administration** > **Invoice** > **Workflows** (left menu). The **Workflows** page appears.
2. On the **Workflows** tab, double-click the desired workflow.
3. Select the  **Steps** page.
4. Double-click the desired workflow step. The **Modify Workflow Step** window appears.
5. In the **Role** field, select *Authorized Approver*.

6. Use the **Authorized Approver Level** field to assign the appropriate level to the step.

The screenshot shows the 'Modify Workflow Step' dialog box. The 'Role' dropdown is set to 'Authorized Approver'. The 'Authorized Approver Level' field is empty and highlighted with a red circle. A red arrow points from the 'Authorized Approver' dropdown to the 'Authorized Approver Level' field. Other fields include 'Step Name: Approval for Processing', 'Restrict approvers to those with limit authority: [unchecked]', 'Restrict approvers to those with exception authority: [unchecked]', 'Approver Editable By: No One', 'Deletable By: No One', 'Initial Status: Accounting Review', and 'Approval Actions: Approve, Send Back to Employee'. There are 'Save' and 'Cancel' buttons at the bottom right.

---

**NOTE:** The **Authorized Approver Level** field appears only if the *Authorized Approver* option is selected in the **Role** field.

---

7. Click **Save**.

## Step 2: Assign the Level to the Approver

Once the level is added to the workflow step (described above), the **Level** field will appear in the **New Authorized Approver** and **Modify Authorized Approver** window.

▶ **To assign the level to an approver:**

1. Click **Administration** > **Invoice** > **Workflows** (left menu). The **Workflows** page appears.
2. Click the **Authorized Approvers** tab and then the **Authorized Approver List** tab.
3. On the left side of the page, select the appropriate hierarchy node.
4. On the right side of the page, double-click the desired approver.

5. In the **Modify Authorized Approver** window, enter the desired level number in the **Level** field.

6. Click **Save**.

Alternatively, authorized approvers may be assigned to levels via record type 720 in the employee import.



For more information, refer to the *Shared: Employee Import Specification*.

## Section 6: Edit Authorized Approver Information

Note the following about editing authorized approver information:

- An edit to an authorized approver record goes into effect immediately upon save. The new values are used to search for and evaluate that approver from the point of save forward.
- Any invoices currently assigned to the edited authorized approver will use the new values in determining whether or not the invoice is limit-approved or exception-approved on approval.

You can edit authorized approver information using the Authorized Approver List, the employee import, and/or User Administration. For more information, refer to *Assign the Proper Right to Users* in this guide.

## Section 7: Remove Authorized Approvers

Note the following about removing authorized approvers:

- Removing a user's authorized approver permissions does not delete the standard Invoice approver role nor does it delete the approver from the system. It simply removes the authorized approver capabilities; the approver is no longer available when a workflow step calls for an authorized approver.
- If an invoice is in the approver's queue when the authorized approver is deleted, the invoice stays in the approval queue but is not limit-approved.
- If the invoice has not yet reached the approver, the workflow adjusts accordingly. Since Concur Invoice evaluates the approver at the time the prior

## Section 7: Remove Authorized Approvers

step is completed, the invoice simply moves to a different authorized approver.

You can remove authorized approver permissions by using the Authorized Approver List, the employee import, and/or User Administration. Refer to *Assign the Proper Right to Users* in this guide.

