Concur Request: Workflow – General Information

Setup Guide

Last Revised: October 14, 2023

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
October 14, 2023	In the *Workflow Configuration – Creating > Using the Steps Page* section, added the *Native Integration* selection to the **Role** field description, and added the **Integration Type** field.
June 30, 2023	In the *Overview of Workflows - General > How the System Determines Which Approver to User > Exception - Approver Has Already Approved* section, removed ", or was delegate approved" from the first bullet.
May 19, 2023	In the *Overview - Workflow Configuration > Condition Page* section, added the **Any Previous approvers** and **Any Previous approvers (excluding adhoc*)*** data objects to the **Data Object** field description.
March 10, 2023	In the *Workflow Configuration – Creating > Creating a Workflow* section, added a note to the **Email Employee when step is complete** field description about status change email notifications not being sent for auto-approved (skipped) steps.
February 18, 2023	Made the following updates: • Corrected references to the *Workflow Configuration – Creating* section in the guide. In some places, the guide referenced the *Workflow Procedure – Creating* section instead of the *Workflow Configuration – Creating* section. • In the *Understanding Workflow Rules > Condition Page* section: – Added the **Travel Reservation Exception** data object to the **Data Object** field description and removed the list of unsupported options from the condition editor table. – Added the **Travel Reservation Exception** data object and **Reason code associated with trip segment** field to the fields for data objects table.
February 8, 2023	Removed the Callout option for the External Validation workflow step. Request event subscription services should be used for the External Validation feature.
December 5, 2022	In the *Creating a Workflow > Using the Steps Page* section, added a note concerning employee notification emails not being copied to the employee's delegates.
October 1, 2022	Updated screenshots and edited content for the new user experience.
July 28, 2022	Made the following updates: • In the *Workflow – Event Notifications* section, added reference to the *Request Approval Statuses* section for more information. • In the *Request Approval Statuses* section, updated the description of the Pending External Validation approval status.

Date	Notes / Comments / Changes
July 6, 2022	Made the following updates to the *Creating a Workflow > Using the General Page* section: • Updated the description of the **Only display approvers at or above the current approver's level** and **Use default approver lookup to find authorized approver** settings to indicate the new **Automatically assign authorized approvers** setting should not be used in tandem with these two settings. • Added the **Automatically assign authorized approvers** setting and setting description.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
October 18, 2021	In the *Workflow – Event Notifications* section, removed the following note: **NOTE:** Currently, the functionality documented in this section is not fully functional yet. While you may see some of the new features in the user interface, please do not configure event notifications at this time. We are targeting to have the full functionality available with the October 2021 release. As of the October 2021 release, the full functionality is now available.
October 16, 2021	In the *Workflow Configuration – Creating > Creating a Workflow > Using the General Page* section, changed "skip rules" to "step rules" in the Approval Time Expired Action row in step 3.
September 20, 2021	Added the *Workflow – Event Notifications* section.
September 2, 2021	Made the following updates: • Moved the information from the *Integrated with Travel* and *Integrated with Travel Configuration* sections in this guide to the *Concur Request: Travel and TMC Integration Setup Guide*. • Replaced the information in the *Integrated with Travel* section with a reference that refers readers to the *Concur Request: Travel and TMC Integration Setup Guide* for more information about the Concur Request integration with Concur Travel and the integration configuration. • Removed the *Integrated with Travel Configuration* section from this guide.
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
December 5, 2020	In the *Workflow Configuration – Creating > Using the General Page* section, replaced "processor step" with "Request Administrator step" in the Approval Time Expired Action field description.
October 6, 2020	Added the following statement to the *Restrict Access to Travel Tab Configuration* section: Note that this also applies if a delegate wants to book on behalf of a user; it is not sufficient only for the delegate to have the Approve then Book user permission; the user for whom is booked will need this permission, or the delegate will not be able to book Travel on behalf of this user.

Date	Notes / Comments / Changes
September 29, 2020	In the *Offline PNR Retrieval Configuration* section, renamed the *Concur Request: TMC Integration Setup Guide* reference to *Concur Request: Travel and TMC Integration Setup Guide*.
August 12, 2020	Made the following updates: • In the *Available Data Variables* section, added the following note for the %L_SubmittingUserName% variable to the Variables column in the table: *NOTE: This field label and field value are not currently available in Concur Request. Do not use them in email notifications.* • Updated the information about permissions in the *Restrict Access to Travel Tab Configuration* section, including replacing references to "role" with "permission", and adding references to the Approve then Book permission.
July 20, 2020	Removed the *Request/Authorization Request/Concur Request* section to align with Concur Request product branding.
June 4, 2020	Changed “Authorization Request” to “Concur Request” in Request guide references to align with Concur Request product branding.
June 3, 2020	Changed "Authorization Request" to "Concur Request" in guide title to align with Concur Request product branding.
April 22, 2020	Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated
January 27, 2020	Updated and added additional information about the Concur Request integration with Concur Travel in the *Integrated with Travel* and *Integrated with Travel Configuration* sections.
January 10, 2020	Updated the copyright; no other changes; cover date not updated
December 7, 2019	Removed reference(s) to legacy Budget Insight feature. Clients who want to use budget functionality are recommended to implement the new Budget product that SAP Concur released last year.
November 27, 2019	Removed Amtrak reference from the following note in the *Integrated with Travel Configuration* section: The Approve then Book process for train tickets only supports SNCF and UK Rail Trainline.
September 9, 2019	Updated the first note in the description of the **Email Employee when step is complete** check box in the *Workflow Configuration – Creating* section.
June 19, 2019	Added information about Pending External Validation approval status to the *Request Approval Statuses* section. Also updated the image of the **Site Settings** page to include the new **Display the Close link for Authorization Request Users** setting.
April 13, 2019	Added Budget Approver to the terminology table.
March 1, 2019	Updated the **Change Type** field description in the *Email Notifications > Configuration > Available Data Variables* section to include the new *Notification* value.

Date	Notes / Comments / Changes
January 18, 2019	Changed copyright and added a note about the **Can Book Travel** check box to the *Integrated with Travel Configuration > Restrict Access to Travel Tab Configuration* section.
October 4, 2018	Added the *Integrated with Travel Configuration > Handling Requests That Can't be Booked in Travel* section, and updated the *What the User Sees – Approve then Book Process* and *Post Approval Trip Updates* sections.
July 26, 2018	Updated the *Integrated with Travel > What the User Sees – Approve then Book Process* section.
July 18, 2018	Added reference the *Concur Travel: Approvals, Rules, and Classes/Policies Travel Service Guide* guide in *Section 18: Integrated with Travel Configuration*.
April 12, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated.
February 8 2018	Changed copyright and updated guide name in reference to the *Shared: Employee Import Specification* guide.
September 16 2017	Updated the *Email Notifications > Overview* section.
May 31 2017	Updated the *Offline PNR Retrieval Configuration* and *Exception – Approver has Already Approved* sections and the definition for the *Skip approval step if approver has already approved* setting.
March 23 2017	Updated the *Passive Approval* and *Creating a Workflow > Using the General Page* sections.
February 23 2017	Updated the *Passive Approval* and *What the User Sees – Approve then Book Process* sections.
January 20 2017	Updated the *Notification to Approver When Booked Amount is Greater than Approved Amount* section.
January 12 2017	Updated the *Post Approval Trip Update* section.
January 10 2017	Updated the definition of the Approval Time Expired Action.
December 21 2016	Added a note to the *Integrated with Travel Configuration > Basic Configuration* section.
December 14 2016	Changed copyright and cover; no other content changes.
December 9 2016	Updated the *Passive Approval* and *Post Approval Trip Update* sections, and the *Workflow Rule Actions > Change Approver* definition.
November 30 2016	Updated the *Available Data Variables* section to add the CWT "Clipper" Agency Proposal data variable, and information about adding the Travel Details section to the approval email.
October 26 2016	Updated the *Post-Approval Trip Updates* section.
October 20 2016	Updated the *Permissions* section and guide content to new corporate style; no content changes.
September 9 2016	Added two new sections to *Integrated with Travel Configuration*: *Passive Approval* and *Post-Approval Trip Updates*.
June 17 2016	Updated note in *What the User Sees – Approve then Book Process* section.

Date	Notes / Comments / Changes
June 10 2016	Added a warning to the *Configuring Pre-Approval Conditions* section.
May 25 2016	Updated the *Notification to Approver When Booked Amount is Greater than Approved Amount* section.
May 16 2016	Updated the *Email Notifications - Including a Link to the Request* section, added the *Configuring Pre-Approval Conditions* section to the *Integrated with Travel Configuration* section, and updated the *Permissions* section and guide to comply with corporate style guidelines.
May 3 2016	Updated the *Restrict Access to Travel Tab Configuration* section.
April 15 2016	Added new Approved Amount Before Booking data variable, and updated the *Notification to Approver when Booked Amount is Greater than Approved Amount* section.
March 18 2016	Added new section *Restrict Access to Travel Tab Configuration*.
February 26 2016	Added new section *Offline PNR Retrieval Configuration*.
February 22 2016	Updated the User Comment Data Variable.
February 19 2016	Added warning note to *Notification to Approver When Booked Amount is Greater than Approved Amount* feature information- this feature should not be used yet.
January 15 2016	Updated information about Approval Time Expired settings.
November 20 2015	Added information about the Total Post Approved Amount field in email notification and workflow rules, added the *Notification to Approver When Booked Amount is Greater than Approved Amount* section, changed references for *Authorization Request: Risk Management Integration Setup Guide* to *Authorization Request: Risk Management Setup Guide*.
September 18 2015	Added the *Integrated with Travel Configuration > Agency Booking Configuration* section.
April 10 2015	Updated the *What the User Sees – Starting in Request Process* section.
March 13 2015	Updated **Integrated with Travel Configuration** section.
January 16 2015	Updated the screen shots to the enhanced UI and updated **Integrated with Travel Configuration** section.
December 22 2015	Added new User Comment variable for workflow email notifications.
November 30 2014	Integration Administrator has changed to Import/Extract Administrator; no other content changes
November 14 2014	Updated Configuration to change Request Administrator to Request Configuration Administrator where necessary.
September 19 2014	Added information about two user interfaces; no other content changes.
October 17 2014	Added information about workflow step TMC Agent role.

Date	Notes / Comments / Changes
August 22 2014	Added new **Integrated with Travel** section. Also added: For rules: • Data object – Request – added: ♦ Ignore Booking Policy
July 11 2014	For rules: • Data object – Segment – added: ♦ Class
April 22 2014	Added information about: • Prevent Approval After the Approval Time Limit • %ChangeType% email reminder option
February 11 2014	Removed references that Agency Proposals is available only in France; it is now available worldwide
January 17 2014	Added information about default Approver 2
October 28 2013	Added: • For rules: ♦ Data object – Segment – added: – Booking origin ♦ Data object – Request – now available: – Highest Location Risk Level – Main Destination Risk Level ♦ Data object - Request Entry - now available: – Location Risk Level ♦ Data object - Segment - now available: – From Location Risk Level – To Location Risk Level • In workflow steps, the **Role** list contains *Risk Manager* if Risk Management has been enabled. • For email reminders, added a note about default reminders for Risk Management.
July 19 2013	Added to the Request Entry Attendee data object: • Middle Initial • Suffix • Custom 21 to 25
July 1 2013	Added to email notifications: • Main Destination • Highest Country Risk Level (not yet available) • Approval Limit Date • Total Remaining Amount

Date	Notes / Comments / Changes
June 14 2013	Added information about: • **Expiration Email to Approver** field • New email options for workflow step rules
May 17 2013	Added information about Request data object: • Has Event Request • Has Offline Agency Segments
April 26 2013	Added information about: • Amount-Daily Limit for Request Cash Advance
March 28 2013	Data object - Request: • Changed: Request Type Code to Request Type • Added: ♦ Created By Delegate ♦ Highest Location Risk Level (used with Risk Management; not yet available) ♦ Main Destination Risk Level (used with Risk Management; not yet available) Data object - Request Entry - added: • Location Risk Level (used with Risk Management; not yet available) Data object - Segment - added: • From Location Risk Level (used with Risk Management; not yet available) • To Location Risk Level (used with Risk Management; not yet available)
March 4 2013	Added a note about the *Default Agency Confirmation Available Notification* and the *Default Agency Proposal Available Notification*, which are used with the Agency Proposals feature (refer to the *Authorization Request: Agency Proposals Setup Guide*)
February 22 2013	Added information about: • Name change from "Travel Request" to "Request" • The **Request Type Code** field to workflow rules • The Filter expenses to those that are applicable to Cost Object option
January 18 2013	Clarified that "days" in the **Expire After This Many Days** field are 24-hour periods from the time the travel request is submitted Added information about these Request data object options: • Main Destination City • Main Destination Country
January 4 2013	Clarified that "days" in the **Expire After This Many Days** field are calendar days - not business days
December 28 2012	Made rebranding and/or copyright changes; no content changes
November 20 2012	Added information about the objects used for cash Advance Limits

Date	Notes / Comments / Changes
October 19 2012	Added information about additional fields/values for rules and the setting for cost object approval
July 13 2012	Added information about the **Duration (Days)** field
June 22 2012	Added information about the **Policy Compliant** field
May 18 2012	Added information about attendee rules and vendor rules
April 20 2012	Added information about %ATTACHMENT%
March 6 2012	Made rebranding and/or copyright changes; no content changes
January 20 2012	Added information about recall after approval
December 19 2011	Added the options for all of the condition editor data objects
November 22 2011	Added information about Processor
October 21 2011	Added additional data objects
September 23 2011	Added information about the two cancellation emails
July 22 2011	User interface changes - "Request" changed to "Travel Request" - updated menu options and screen shots
June 21 2011	New Printed Reports screen shot
June 3 2011	Changed occurrences of "Request" to "Travel Request" - no other changes to content
May 31 2011	Added information about authorized approvers and the *Travel Request: Workflow - Authorized Approval Setup Guide*
March 18 2011	Added information about: • Workflows moved to the *current* user interface • Email Notifications moved to the Workflow tool
January 21 2011	Changes: • Update to match current feature set • Updated the copyright and made rebranding changes
October 15 2010	Initial publication

Workflow – General Information

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.

Also, 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: Overview of Concur Request

Refer to the *Concur Request: Overview Guide* for general information about requests, such as what the user sees, what the approver sees, workflow, settings, configuration basics, etc.

Section 3: Concur Request Configurations

Not all Concur Request features are available for all Concur Request configurations.

Configuration	Is this feature available?
Stand-alone	Yes, Required
Integrated with Concur Expense (but not Concur Travel)	Yes, Required
Integrated with Concur Travel (but not Concur Expense)	Yes, Required
Integrated with Concur Expense and Concur Travel	Yes, Required

Section 4: Workflow Guides

Refer to these guides when configuring and maintaining workflows.

Setup Guide	Description
Concur Request: Workflow - General Information	Read this guide for general information about request workflows.
Concur Request: Workflow - Authorized Approval	Read this guide if the company uses authorized approvers but only ***after*** reading the *Concur Request: Workflow - General Information Setup Guide*.
Concur Request: Workflow - Cost Object Approvals	Read this guide if the company uses cost object approvals but only ***after*** reading the *Concur Request: Workflow - General Information Setup Guide*.

About this Guide

The Workflows tool in the Administration > Request is used to manage:

- Workflows
- Request approval statuses
- Email notifications
- Confirmation agreements
- Authorized approvers
- Workflow settings

This guide describes each of these sections ***except*** Authorized approvers.

📖 For more information, refer to *Concur Request: Workflow - Authorized Approval Setup Guide*.

Section 5: Overview of Workflows - General

Terminology

Term	Description
Workflow	A *workflow* defines how a request is routed for approval through the system after it is submitted by the user.

Term	Description
Workflow rule	A set of criteria that, when met, activates a request workflow step Each workflow step can have multiple workflow rules. A workflow rule consists of a condition and one or more actions. The condition is an expression that examines the data from a request, or employee data for the employee, makes comparisons, and then evaluates whether it is true or false. • If true, the system performs the action defined by the rule. • If false, the system does not perform the action.
Role	A mechanism that identifies the person responsible for moving the request to the next step There is also a *System* role. A step identified with the system role indicates that the request was moved to the next step automatically without human interaction.
Approver	*Approver* is a general term that identifies any employee who has the authority to approve requests.
Budget Approver	Budget approvers approves invoice and purchase request transactions. 📖 For more information, refer to the *Shared: Budget Setup Guide*.
Default Approver Default Approver 2	Generally, every employee is assigned a *default approver*. When an employee submits a request, it is automatically sent to the default approver for review and approval. If an employee does not have a default approver, the employee may be prompted to select an approver (depending on configuration) or prompted to contact an administrator for assistance. The default approver can be set by the User Admin, via the employee import, or – depending on configuration – by the employee in Profile > Profile Settings > Request Approvers. **NOTE:** Whether an employee can select their own approver – while submitting or in Profile – is configurable. **Second default approver:** The user may have a second default approver. If so, the admin can design the workflow to send the request to the first default approver and then to the second default approver. If the workflow includes the second default approver, then the field for the second default approver appears in Profile. All permissions and restrictions that apply to the first default approver also apply to the second default approver.

Workflow Basics

A *workflow* defines how a request is routed for approval through the system after it is submitted by the user. Generally, after the user submits a request, it is routed to the request approver, who reviews and approves it. Once approved, it becomes available to the user to attach to an expense report.

Though an administrator can add additional steps, a request workflow always consists of *at least* these steps:

Step	Description
Request Submitted	The employee submits the request.
Manager Approval	The request approver approves the request.

Assigned to a Request Policy

During the configuration process, the administrator assigns the request workflow to a request policy. This allows a company to have different workflows for different policies.

Default Request Workflow

Concur Request provides a default request workflow. It can be used "as is" or the administrator can copy the default workflow and then modify the copy to meet the company's particular needs.

The table below lists the default steps. The **Role** column defines the type of user who takes action at this step. If no approvers are involved, then the role is *System*, which means that the system moves the request along to the next step automatically without human interaction.

The default request workflow contains the following steps:

Step Order	Step Name	Role
1	Request Submitted	System
2	Manager Approval	Request Approver
3	Request Approved	System

How the System Determines Which Approver to Use

The request workflow is set at the point the user submits the request. The Concur Request uses the workflow configuration to create steps that the request will follow and fills in each step with an approver based on the default approver assigned to the user in the previous step. If no default approver exists, then the approver remains blank for that step and the user in the prior step will be asked to select an approver.

When an employee submits a request, the system checks to see if a default approver has been assigned to the employee:

- If yes, then that person is the assigned approver for the next workflow step. Workflow actions (like change approver) can modify this default approver when the request arrives at that workflow step.

- If no, then the system checks to see if users can choose their own approvers:
  - **Yes:** If the employee is permitted to select their approver, then:
    - The user may edit the default approver in the profile.
    - If no default approver is assigned to the next workflow step, then the employee is prompted to select one on submit.
    - If a default approver has been assigned, then the default approver's name appears but the employee can select a different approver if desired.
  - **No:** If the employee is ***not*** permitted to select their approver, then:
    - If a default approver has been assigned, then the request is routed to that person.
    - If a default approver has ***not*** been assigned, then the employee is notified that there is no valid approver and to contact the Concur administrator.
  - **Optional:** If the step in the workflow involves a processor and not an approver, then no prompt for an approver is displayed.
- If the **Prompt for approver when a request is submitted** option is selected in User Administration or **Profile** > **Profile Settings** > **Request Preferences**
  - and -
  If the **Allow users to select their own approver for requests** option is selected on the **Settings** tab (as described in *Workflow Settings* in this guide)
  - then -
  the **Approval Flow** tab is displayed when the employee clicks **Submit Request** – allowing the user to review and optionally modify the selected approver
  - ***if*** -
  the step does *not* include a processor, which prevents the choosing of an approver for that step.

When the approver approves the request, the approver for the next approval step is set as the default approver for the current approver. Again, this default approver may be modified by workflow actions.

- If the default approver for the next step is not set, the current approver is prompted to select an approver.
- If the **Prompt for approver when a request is submitted** option is selected in User Administration or **Profile** > **Profile Settings > Request Preferences**, then the **Approval Flow** tab is displayed – allowing the approver to review and optionally modify the selected approvers or add ad-hoc steps (if allowed).
- If a processor is set for the next step, the **Approval Flow** page is not displayed.

NOTE: Workflow rule actions that *change the approver* are not executed until the request arrives at that workflow step. This means that the approver displayed on the **Approval Flow** tab - up to that point - may not be the person who approves the request in the end.

Exception - Approver Has Already Approved

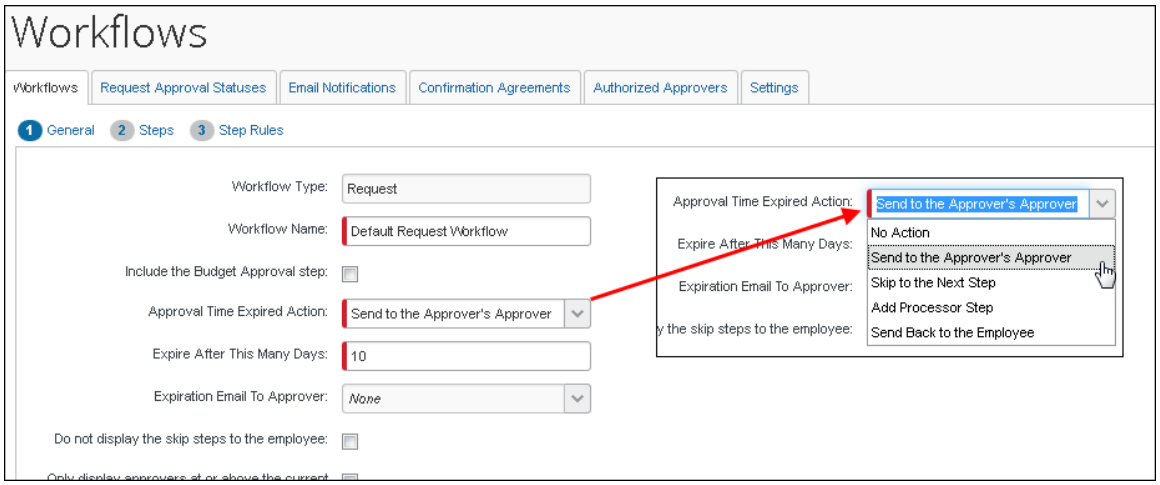
Note the following exception to the process described above: If the administrator selects the **Skip approval step if approver has already approved** setting (described in the *Workflow Configuration – Creating* section), then the system skips subsequent occurrences of the same approver if that approver previously approved the request.

Note the following:

- The approver must actually ***approve*** the request. The subsequent "skips" do not occur if the *original* approval has timed out or has been skipped.
- Ad-hoc steps are not skipped even if the approver previously approved the request.
- Steps that include a request process are not skipped even if the processor previously approved the request.
- The approver step is not skipped if the approver already approved the request in a Cost Object approval step or a Budget approval step, as that approval only applied to the cost objects or budget associated with the request.

Approver Made Inactive

If an approver is made inactive or the approver role is removed from the user while a request is pending action by that approver, Concur Request immediately takes the company's time-out action. Meaning, the system handles the request as shown in the **Approval Time Expired Action** list.



If the company does not use the time-out feature, the request is sent back to the employee.

Adding a Processor to a Workflow

Before adding a processor (TMC Agent or Request Administrator) to a workflow, refer to the *Concur Request: Processor (Configuration) Setup Guide*.

Section 6: End-User Experience

Approval Flow Tab

As part of the company configuration, the company can allow its Concur Request users to select their own approvers. In addition, the company can allow users (employees and approvers) to rearrange workflow steps.

NOTE: If a processor is set for any workflow step, the **Approval Flow** page will not be displayed.

Whether or not the company allows employees or approvers to edit a workflow, employees can access the **Approval Flow** tab.

- If employees are allowed to edit their own workflow, then this page contains **Add Approval Step** links so the user can add or remove ad-hoc approver steps from the list. Workflow steps from the configured workflow cannot be removed.
- If employees do not have the proper permissions, the fields are all read-only.

For the most part, there are three types of edits. The type(s) allowed, and the behavior displayed, depends on the permissions granted the user. The options are:

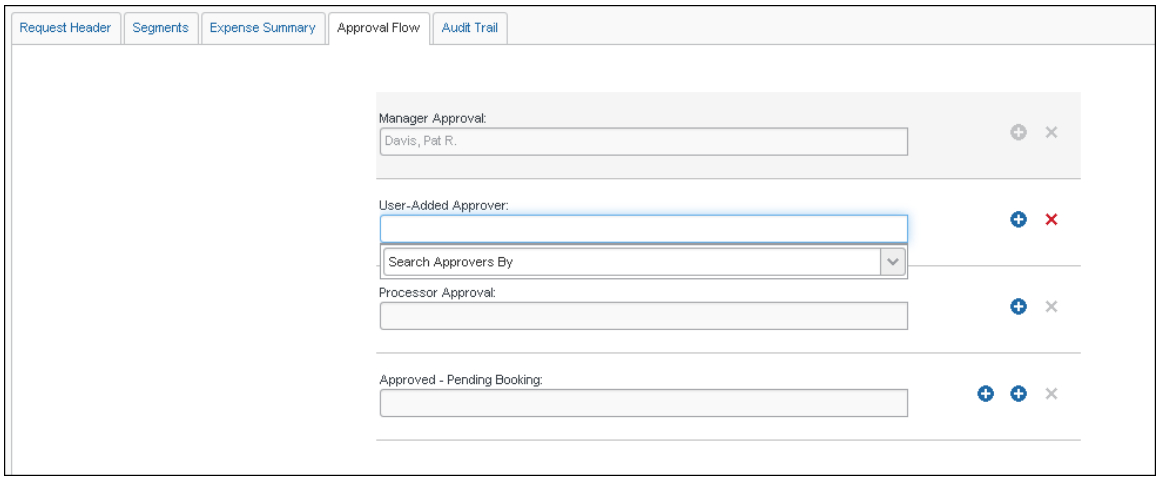
- Edit the selected request approver for a step
- Add a new step/approver
- Delete an existing ad-hoc step

Approve & Forward Feature

The administrator can set an option so that the **Approve & Forward** button appears on the approver page.

Refer to the *Workflow Configuration – Creating* section in this guide. The administrator sets the **Steps Can Be Added By** option to *Approver Only* or *Both Employee and Approver* on the **Workflow** tab.

When the approver clicks the **Approve & Forward** button, the **Approval Flow** tab opens with the new step already inserted and the insertion point set in the field - ready for the approver to make the selection.



The approver selects the next approver and clicks **Approve**. The request is approved and then moves to the next approver.

Request Returned to the Employee

If the request is sent back to the employee ***and*** the employee resubmits the request, the workflow is set to the current workflow settings. Depending on the current workflow settings, the employee may have to make the desired changes again.

Section 7: Integrated with Concur Travel

For information about Concur Request integrated with Concur Travel and configuring the integration, refer to the *Concur Request: Travel and TMC Integration Setup Guide*.

Section 8: Overview - Workflow Configuration

Workflow Design

First, determine the type of workflow you want by reviewing these general workflow concepts:

General concept	Description
Centralized approval workflow	With this type of request workflow, the employee can *view* the name of their default approver but cannot select a different approver. In this case, when the employee submits a request, it is automatically routed to the default approver.
Decentralized workflow or Employee-directed Approval	Where the employee selects their approver: • The employee selects from a list of approvers. • The employee might be assigned a default approver, but the employee can select a different approver if desired. • The employee can change the workflow steps and add additional steps using the **Approvals Flow** tab.
Approver-directed approval	Like the decentralized workflow, the ***approver*** – but not the employee – can route the employee's request to another approver.
Approval time expired	After a certain number of days (calendar days - not business days) that a request is not approved, the request can be rerouted to another approver, skipped, or sent back to the employee.

Configuration Steps

Then, when configuring the desired number of workflows, perform these steps in the following order.

NOTE: These steps are discussed ***briefly*** here and ***in detail*** later in this guide.

1. Create any custom request approval statuses that you may use in the workflow.

   Refer to *Request Approval Statuses* in this guide.

2. Create a request workflow by copying an existing request workflow.

3. Make the desired changes to the copy. Add additional steps, change step configuration settings, and create workflow rules if desired.

4. Assign the request workflow to a policy.

Understanding Workflow Rules

During the configuration process, once you have created the workflow steps, you can attach rules to each step. A workflow rule consists of two parts:

- **A conditional expression:** The *if* portion of an *if / then* statement, such as, "if the request amount is greater than 5,000 USD"
- **An action or actions:** The *then* portion of an *if / then* statement, such as, "then route the request to the Executive Approver"

The system compares the request data or employee data to the conditional expression (if one exists) for each step of the workflow process. If the criteria are met, the system activates the resulting action.

Keep the following in mind:

- Workflow rules execute at the beginning of the step – before any human interaction. If not met, then the request goes on to the next workflow step or waits for an approver to move it along by approving it or activating other approval-related actions, such as Send Back to Employee.
- A workflow step can have multiple rules applied to it, so if one rule is false, it checks for the next rule and resulting action, and so on until one of the rules is met. An option is available to force all rules to be reviewed before moving on to the next step.

Conditional Expressions and the Condition Page

A typical rule for "if the request amount is greater than 5,000 USD" is:

To set up a workflow rule, the administrator uses a condition editor. This section explains the condition editor.

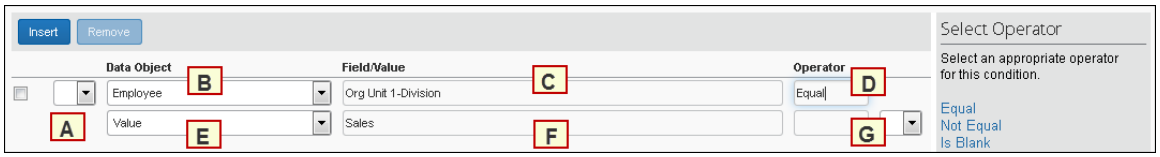
Keep the following in mind when creating or editing conditional expressions.

- There is no limit to the number of conditions that exist in an expression.
- It is comprised of two conditions, separated by *and*.
- Most conditions are comprised of a **field** then an **operator,** then a **value**.
  - A *field* consists of a data object (essentially a database table) and fields in that data object (essentially a database column). The field selected defines the data type of the condition (number, text, date, and so on).
  - An *operator* is one of several pre-defined comparison operators (equals, not equals, is greater than, and so on). The list of operators changes depending on the type of data being compared.

  - A *value* is a constant, and like the field, can be of any data type. The data type of the value must match the data type of the field.
  - If the condition uses a second field, its data type must match that of the first field.
- When a conditional expression is composed of multiple conditions, each condition is separated by either *and* or *or*.
- Parentheses are optional and are used to define order of operation for the *and / or* operators. If the parentheses are omitted, *and/or* operations are carried out left to right. There is no precedence of *and* over *or*. The evaluation of the expression simply proceeds from left to right.
- If a conditional expression contains parentheses, the count of *left* parentheses must match the count of *right* parentheses. You can use up to three parentheses for both left and right sides.
  - Example of correct placement of parentheses and total left/right count:
    `(Condition 1) and (Condition 2)`
  - Examples of incorrect parentheses even though total left/right count matches:
    `Condition1 ) And ( Condition2`
    `Condition1 ) And ( Condition2 ) Or ( Condition3`
    `( Condition1 )) And ( Condition2`

Condition Page

The **Condition** page in the Workflows tool is similar to the **Condition Editor** page used in the Audit Rules tool and Expense Processor.



Each condition appears on two lines in the condition editor. The table below describes the condition editor.

Field	Description
A: Left Parenthesis	Select zero to three parentheses, depending on the complexity of the condition.

Field	Description
B: Data Object	Not all data objects are supported in Request. ! If you create a condition with an unsupported data object, you will encounter workflow errors. The **supported** options are: • Agency (used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*) • Any Previous approver • Any Previous approver (excluding adhoc) • Employee • Request • Request Allocation • Request Cash Advance • Request Entry • Request Entry Attendee • Request Exception • Segment • Travel Reservation Exception
C: Field / Value	Click an item in the helper pane. The information that appears in this pane is based upon the selection made in the **Data Object** list.
D: Operator	Click an item in the helper pane. The information that appears in this pane is based upon previous choices.
E: Data Object	The system provides the option that best suits the previous choices. Change it if necessary.
F: Field / Value	Click an item in the helper pane. The information that appears in this pane is based upon the selection made in the **Data Object** list.
G: Right Parenthesis	Select zero to three parentheses, depending on the complexity of the condition.
H: And / Or	Click either option to join the current condition to the next condition; this line appears when there are multiple conditions, and only between conditions, never after the final condition.

The fields for the data objects are listed in the tables below.

Field	Description
Agency	Agency Proposal Type (Used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*)

Field	Description	
Employee	Cash Advance Balance	Has Default Approver 2
	City	Ledger
	Country of Residence	Locale
	Custom 01 - 21	Logon ID
	Email Address	Oldest Cash Advance Date
	Employee First Name	Org Unit 1 - 6
	Employee ID	Reimbursement Currency
	Employee Last Name	Reimbursement Method
	Expense Audit Required	State/Province
	Has Default Approver	

Field	Description	
Request	Agency Office Approval Status Approval Time Limit Approved Amount Before Booking Approved by Delegate Authorized Date Cash Advance Policy Fixed Limit Amount (Refer to the *Concur Request: Cash Advance Setup Guide*.) Created By Delegate Creation Date Currency Custom 01 - 20 Duration (Days) (For more information, refer to the *Concur Request: Audit Rules Setup Guide*.) End Date End Time Ever Recalled After Approval Ever Sent Back Exception Approved Exception Level Total Extension of First Approve Date First Submit Date Has Accepted Agency Proposal (Used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*) Has Agency Booked Segments Has Attachment Has Cash Advance Has Comments	Has Event Request (Refer to the *Concur Request: Event Requests Setup Guide*.) Has Exceptions Has Expected Expenses Has Offline Agency Segments (For an example, refer to the *Concur Request: Audit Rules Setup Guide*.) Has Segments or Expenses Has Self Booked Segments Hierarchy Node Key Highest Location Risk Level (Used with Concur Risk Management; refer to the *Concur Request: Risk Management Setup Guide*.) Is Closed/Inactivated Is Deleted Ignore Booking Policy (Used with Enforce Online/Offline Policy; refer to the *Concur Request: Site Settings Setup Guide*.) Limit Approved Main Destination City Main Destination Country Main Destination Risk Level (Used with Concur Risk Management; refer to the *Concur Request: Risk Management Setup Guide*.) Maximum Exception Level Name Policy Previous Approved Amount Processor Entry Date Purpose *(cont'd next page)*

Field	Description	
Request (cont'd)	Request Policy Request Type Start Date Start Time Submit Date Submitted by Delegate Total Amount Cash Advance Related Request Entries (Refer to the *Concur Request: Cash Advance Setup Guide*.)	Total Approved Amount Total Cash Advance Amount-Daily Limit Total Posted Amount Total Post Approved Amount Total Remaining Amount
Request Allocation	Custom 01 - 20	
Request Cash Advance	Account Code Amount Requested Amount-Daily Total (Refer to the *Concur Request: Cash Advance Setup Guide*.) Cash Advance Name City	Currency of Advance Purpose Request Date Requested Disbursement Date Status Travel End Date Travel Start Date
Request Entry	Amount Approved Amount Average Cost Per Attendee City Country Currency Custom 01 - 40 Entry Description Exchange Rate Expense Type Foreign Amount Has Allocations Has Attendees Has Comments	Has Exceptions Has Segments Is Fully Allocated (For an example, refer to the *Concur Request: Allocations Setup Guide*.) Location Risk Level (Used with Concur Risk Management; refer to the *Concur Request: Risk Management Setup Guide*.) Number of Attendees Org Unit 1 - 6 Transaction Date Vendor Vendor Name
Request Entry Attendee	Attendee Title Attendee Type Company Custom 1 - 25 External ID	First Name Last Name Middle Initial Suffix
Request Exception	Exception Code Exception Level	

Field	Description	
Segment	Arrival Date Arrival Slot (Used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*) Arrival Time Booking Origin Class of Service Class Custom 01 - 40 Departure Date Departure Slot (Used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*) Departure Time From Location Detail To Location Detail From Country From Country Group From Location Name From Location Risk Level (Used with Concur Risk Management; refer to the *Concur Request: Risk Management Setup Guide*.)	Has Exceptions Is Agency Booked Is Self Booked Passenger Name Record Policy Compliant (For more information, refer to the *Concur Request: Audit Rules Setup Guide*.) Segment Type Service Name (Used with the Agency Proposal feature; refer to the *Concur Request: Agency Proposals Setup Guide*) To Country To Country Group To Location Name To Location Risk Level (Used with Concur Risk Management; refer to the *Concur Request: Risk Management Setup Guide*.) Vehicle Type Vendor Vendor Name
Travel Reservation Exception	Reason code associated with trip segment	

Workflow Rule Approval Actions

Workflow Rule Approval Actions occur once an approver approves an item, at a specific step in the workflow. The approval actions are:

Approval Action	Description
Change Approver	Sends the request to another approver when the conditions are met Designate the approver on this page. Once rerouted, it continues in the same workflow as the original workflow. **NOTE:** Even when a request's approval step has a Change Approver rule ***and*** meets the conditions of the rule, the **Approval Flow** window initially displays the name of the "changed from" approver – not the "change to" approver. The system cannot know the name of the "changed to" approver until after the request enters the approval step and the system is able to evaluate the conditions of the change approver rule.
Generate Exception	Displays a message to the use and/or approver **Levels:** Exceptions have a level number associated with them. Requests are always submitted; however, the level can be used for creating queries and tracking issues.
Send Back to Employee	Sends the request back to the employee **NOTES:** • This action resets the workflow process, so the original workflow process begins again once the user resubmits the request. • You can apply a message to the step to explain why the system is returning the request. You cannot view this comment from the request comments. • If an action that the system performs during a step of the workflow process sets the approval status of the request to Send Back to Employee, then the system views the workflow as complete. In such instances, the system always sends a "workflow step complete" notification email to the affected user. However, if the employee has marked the email notification check box, the system sends a default alternate "request returned" email to the employee regardless of their preference settings. The email notifications are configured on the **Email Notifications** tab in Workflows. 📖 Refer to *Email Notifications* in this guide. The system logs all the completed steps in the history of the request for the user to view.

Approval Action	Description
Send Email	Sends an email notification to an employee designated here • For the email address, the admin can either: ♦ Enter an email address ***– or –*** ♦ Send the email to the user's default approver • For the email body and subject, the admin can either: ♦ Enter a subject line and message ***– or –*** ♦ Select an email notification (either a default notification or you can create and use a custom email notification)
Skip Step	Skips the current step if the condition is met, and moves to the next step in the workflow **NOTES:** • You can apply a message to the step to explain why Concur Request skipped the step. • You can view this comment from the request comments.

Workflow Rule Approval Action Order

The actions occur in the following order:

1. All exceptions and email actions
2. Any one of the following, if added to the condition:
   - Skip this workflow step
   - Change approver
   - Send back to employee

Workflow Rule Limitations

There are a few limitations built into Concur Request to avoid creating illogical workflow rules as outlined in this section.

A single workflow rule can contain only ***one*** of these actions:

- Skip step
- Change approver
- Send back to employee

A workflow rule can contain multiple instances of these actions:

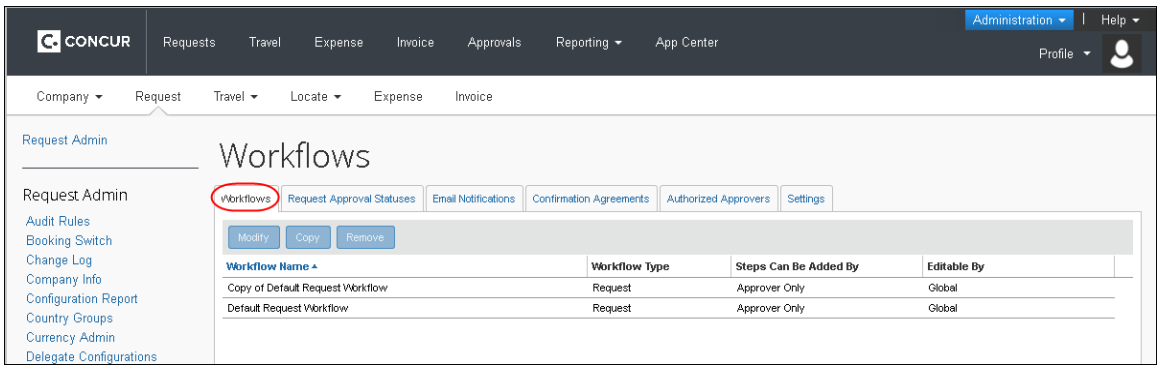
- Generate an exception
- Send email

Section 9: Accessing the Workflows Tool

Accessing the Tool

To access Workflows:

1. Click **Administration** > **Request**.
2. Click **Workflows** (left menu). The **Workflows** tab of the **Workflows** page appears.



The following information appears.

Column	Description
Workflow Name	Name of the workflow
Workflow Type	Type of workflow
Steps Can Be Added By	User type who can add steps to the workflow while it is in process
Editable By	Members of group(s) that can edit this workflow

Section 10: Workflow Configuration - Creating

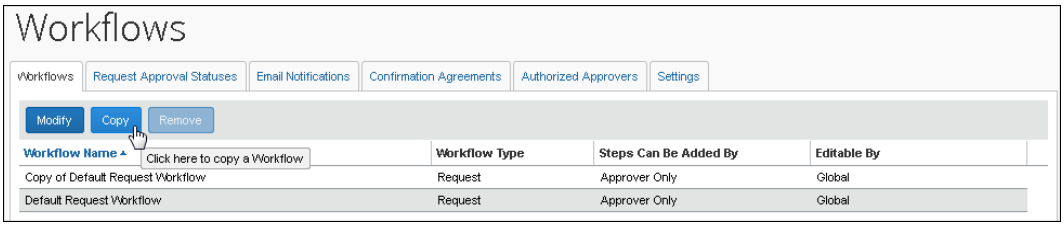
Creating a Workflow

To create a new request workflow, copy an existing workflow and make the desired edits to the copy.

Using the General Page

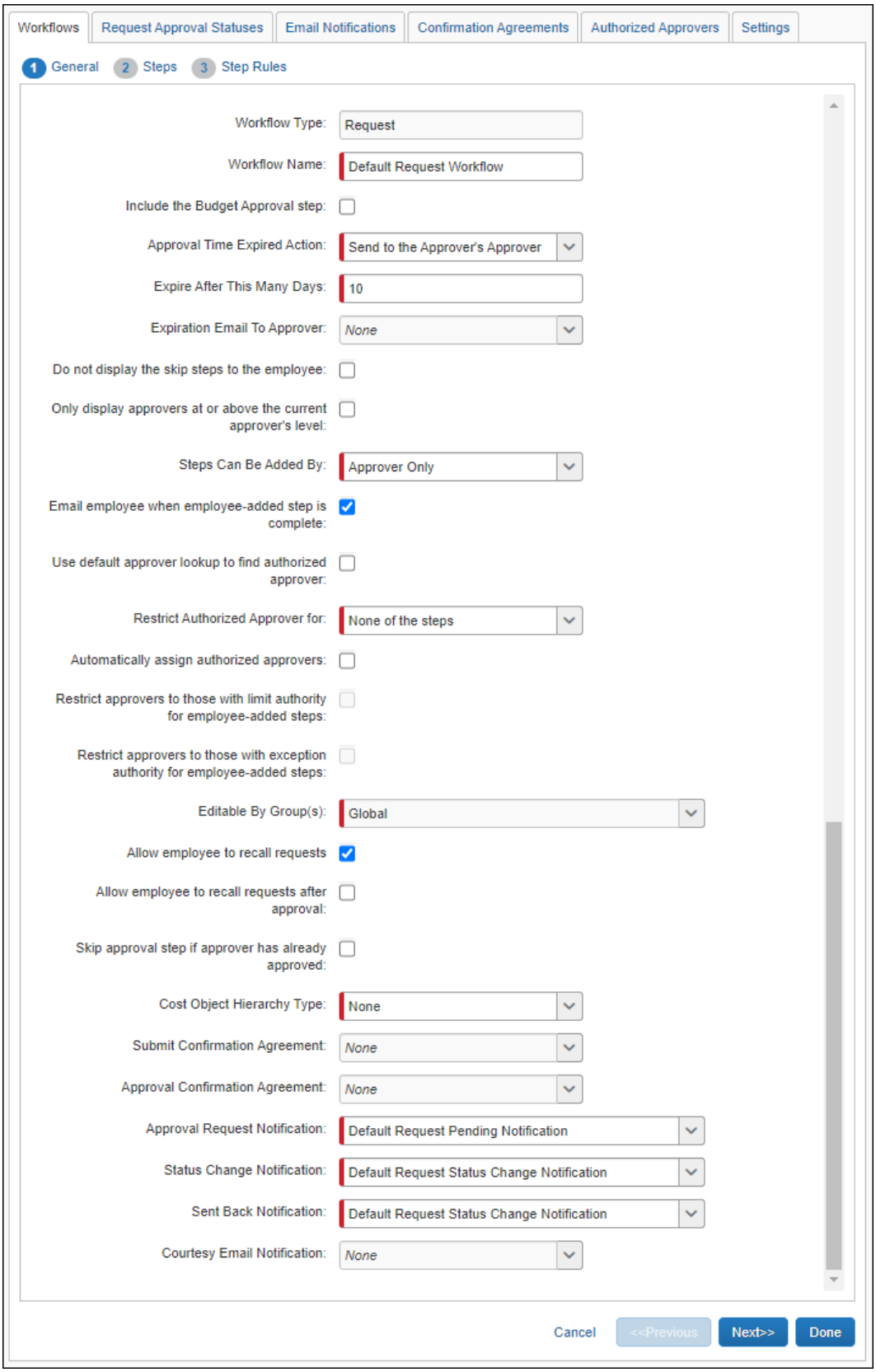
To create a new workflow:

1. On the **Workflow** tab, click the desired workflow.



2. Click **Copy**.

The **General** page appears.



3. Complete all required fields.

Field	Description
Workflow Type	This field is read-only.
Workflow Name	Type a new name for the workflow. This name does not have to be unique.
Include the Budget Approval step	Select (enable) this check box to add the Budget Approval step to the workflow. 📖 Refer to the *Shared: Budget Setup Guide*.
Approval Time Expired Action	Click one of the following to define the action to take when an approver has not approved a request for the defined number of days: • No action; the *No Action* option means that there is no time limit for an approver to approve a request • Reroute the request to the approver's approver; if there is no such approver, then the system creates a Request Administrator step • Skip this step and go to the next step **NOTE**: If the request reaches the step via a Timeout action, step rules are ignored. If the Timeout action occurs on the last workflow step, then the request is approved. This ensures an approver reviews the request, and it does not proceed through workflow without this basic approval. • Send to the processor - ***do not use this option*** • Send back to the employee See **Expiration Email to Approver** below. **NOTES:** • If Passive Approval is enabled at the policy level, this workflow field should be set to No Action. The policy setting will determine the correct action. 📖 For more information, refer to the *Concur Request: Policies and Groups Setup Guide*. • A scheduled job for this action is run daily by default to check for the timeouts each day and reroute the request according to the defined action. The scheduled job can be seen and edited using the Import/Extract Administrator tool. Depending on your company's implementation, you may have to submit a case to SAP Concur support for assistance with this task.

Field	Description
Expire After This Many Days	Enter the number of days the approver has before the action as defined in the **Approval Time Expired Action** field takes place. Calculation: The expiration time is calculated from when the request is submitted ***plus*** the number in this field ***times*** 24 hours, ***then*** to the next time the expiration job is run (which can be run any time during the day).
Expiration Email to Approver	If any option other than *None* is selected from the **Approval Time Expired Action** list, then this list appears. Click any of the email notifications in the list. That email will be sent to the approver when the workflow step expires. 📖 You can also create a custom notification using Workflows > Email Notifications. Refer to *Email Notifications* in this guide.
Do not display the skip steps to the employee	If there are workflow steps that can be skipped, then the employee does not see that those steps are part of the workflow on the **Approval Flow** tab in Concur Request. The system determines whether a step is skipped based on the workflow rules and the skip step rule action defined at the step level. If you clear (disable) this check box, then any step with a skip step action is displayed in parentheses.
Only display approvers at or above the current approver's level Use default approver lookup to find authorized approver	These fields appear only if authorized approver is activated. We recommend that clients do not use this setting in tandem with the **Automatically assign authorized approvers** setting. 📖 Refer to the *Concur Request: Workflow – Authorized Approval Setup Guide*.
Steps Can Be Added By	Click the desired option to indicate whether employees and/or approvers can add steps during the workflow process using the **Approval Flow** tab in Concur Request. **NOTES:** • If the **Allow users to select their own approver for requests** field on the **Settings** tab is ***not*** selected, then the employee does not see this option. • If this option is set to either *Approver Only* or *Both Employee and Approver*, then the **Approve & Forward** button appears on the approver page.
Email employee when employee-added step is complete	Select (enable) this check box to send an email to the employee when the step that they added has an action taken on it, such as approved. This field is only available if you have chosen an option in the **Steps Can Be Added** field.

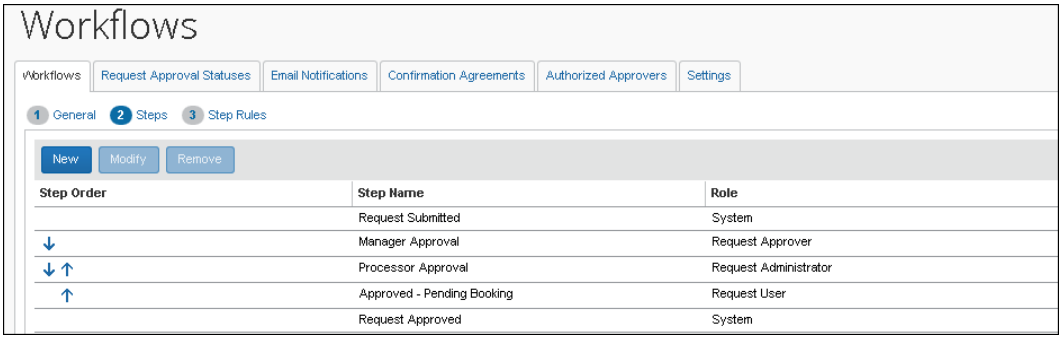
Field	Description
Restrict Authorized Approver for Restrict approvers to those with limit authority for employee-added steps Restrict approvers to those with exception authority for employee-added steps	These fields appear only if the authorized approver feature is activated. 📖 Refer to the *Concur Request: Workflow – Authorized Approval Setup Guide*.

Field	Description
Automatically assign authorized approvers	This setting only applies if authorized approver is activated. Use this setting to ensure that all authorized approval steps have an assigned Authorized Approver for the expense report, **without user action**. Important considerations before enabling this setting: • If there are multiple possible Authorized Approvers that could be assigned to a specific Authorized Approver workflow step, the system will order the choices alphabetically by last name, followed by first name (if there is more than one person with the same last name) and then select the first choice from the alphabetized list. • Enabling this setting is not recommended when there might be large numbers of possible approvers for some workflow steps. In this situation, the user needs to select the appropriate approver for the request rather than sending all reports to the alphabetically-first approver. • The individual **Request Preferences** page setting, **Prompt for approver when a request is submitted**, will display the approval flow to the user for review during the submit process when the setting is selected (enabled). This can encourage the user to verify that the appropriate approver is assigned to each step prior to submitting the request. • Use of this feature is optimized by configuring the workflow to allow users to edit approvers, so this is strongly recommended. Refer to the **Approver Editable By** setting in the **Add Workflow Step** dialog. • Clients who currently use the **Use default approver lookup to find authorized approver** setting on the **General** page (**Workflows tab > General page**), should choose to either retain that setting or use the **Automatically assign authorized approvers** setting instead. We recommend that these two settings are not enabled and used at the same time. 📖 Refer to the *Concur Request: Workflow – Authorized Approvers Setup Guide*.
Editable By Group(s)	Select the group rights that an administrator must have in order to modify this workflow.

Field	Description
Allow employee to recall requests	Select (enable) this check box to allow the employee (or their delegate) to recall a request after it is submitted. The **Recall** button appears in Concur Request when the request is opened, allowing the user to recall the request. Recall is allowed up to the point that the request is ready for extract to the financial systems.
Allow employee to recall requests after approval	Select (enable) this check box to allow users to recall a request after it has been approved. For example, assume that the user's request for sales training was approved and then the date of the sales training class changed. The user can recall the request, make the desired changes, and submit again. The request will then go through the approval workflow. The user can recall a request if all of these are true: • The feature is enabled. • The request status is Approved. • Both the start and end dates are in the future. **NOTE:** A "blank" date is considered to be "in the past" so the recall option is unavailable. • There is no expense report (or an invoice from Concur's Central Reconciliation service) associated with the request. Then, the user can change dates, segments, amounts, etc. **NOTE:** The user cannot change a cash advance. **Email Notifications** • You can also select the email notification that will be sent to the travel agency – if there are agency-booked segments in the request – in Request Policies. 📖 Refer to the *Concur Request: Policies and Groups Setup Guide*. • You can configure the email in Email Notifications. 📖 Refer to *Email Notifications* in this guide.
Skip approval step if approver has already approved	Select (enable) this check box to have Concur Request skip subsequent occurrences of the same approver if that approver previously approved the request. **NOTE**: If a Budget Approval/Cost Object Approval step is followed by a default approver or Authorized Approver step, the system will not skip the second approval step, even if the first approver has the default approver or Authorized Approver authority. The first approval is for the cost object or budget, and does not include approval for Authorized Approval or default approval. 📖 Refer to *Exception - Approver Has Already Approved* in this guide.

Field	Description
Cost Object Hierarchy Type	Click the cost object approval hierarchy type. Refer to the *Concur Request: Workflow - Cost Object Approvals Setup Guide*.
Submit Confirmation Agreement	Click the confirmation agreement that will be displayed when the user submits the request. Refer to *Confirmation Agreements* in this guide.
Approval Confirmation Agreement	Click the confirmation agreement that will be displayed when the approver approves the request. Refer to *Confirmation Agreements* in this guide.
Approval Request Notification	Click the notification that is to be sent to the approver when the request is submitted by the user. Refer to *Email Notifications* in this guide.
Status Change Notification	Click the notification that is to be sent to the submitter when the workflow status of the request changes. Refer to *Email Notifications* in this guide.
Sent Back Notification	Click the notification that is to be sent to the submitter when the request is sent back to them. Refer to *Email Notifications* in this guide.
Courtesy Email Notification	Click the notification that is to be sent to a user's default approver if that person is ***not*** the first approver in the workflow or if another approver was selected by the user for the first step in the workflow (if the company allows users to select approvers). Refer to *Email Notifications* in this guide.

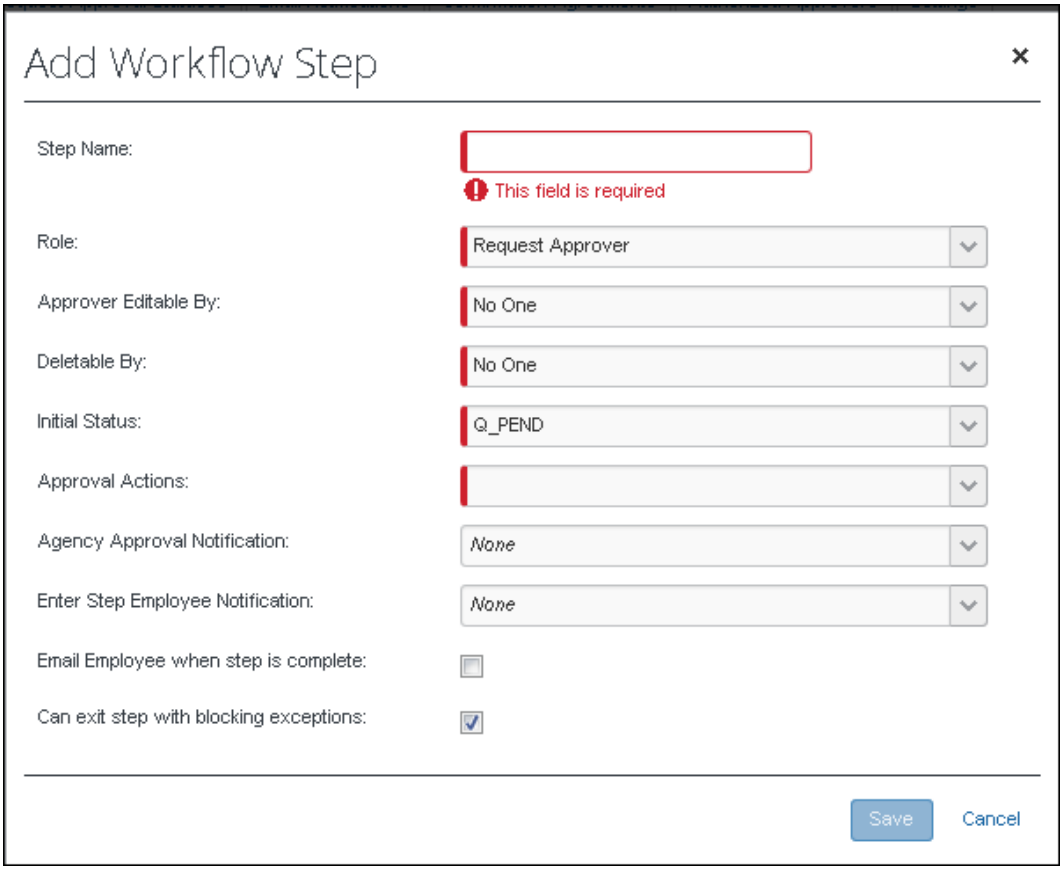
4. Click **Next**. The 2 **Steps** page appears.



Using the Steps Page

To create a new step:

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



2. Complete all required fields.

Field	Description
Step Name	Type any alphanumeric name for the workflow step. This name appears to the employee on the **Approval Flow** tab in Concur Request, so it is important to make this name clear for the employee.

Field	Description
Role	Click the role that represents the person responsible for this step. **NOTES:** • If you select *System*, then the step is fully automated and no employee is required. The page refreshes and only the applicable fields appear. • If you select an approver role, the system displays a multiple selection list of actions to the approver in the **Approval Actions** field. (See the field description below.) • If you select *Default Approver 2* (that is, you add a Default Approver 2 step to the workflow), then the second default approver field appears in the profiles of the users associated with this workflow. Consider configuring the step to skip in order to manage those times when the second default approver field is either inadvertently or intentionally left blank in the user's profile. • For TMC Agent or Request Administrator – **IMPORTANT:** Before adding to a workflow step, refer to the *Concur Request: Processor (Configuration) Setup Guide*. • For Request User: Used with the Concur Request to Concur Travel process flow. 📖 For more information, refer to the *Integrated with Travel* section of this guide. • For TMC Agent – Creating a workflow step with this role does not add an email notification to the TMC Agent user. Email notifications are enabled in Policies, and are sent to the email address associated with the configured Travel Agencies. 📖 For more information, refer to the *Concur Request: Policies and Groups Setup Guide* and *Concur Request: Travel Agency Offices*. • *Budget Approver* appears as an option if Budget has been enabled. 📖 For more information, refer to the *Shared: Budget Setup Guide*. • *Native Integration* appears as an option if the Funds and Grants Integration with Concur Solutions is enabled. 📖 For more information, refer to the *Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition*. • *Risk Manager* appears as an option if Risk Management has been enabled. 📖 For more information, refer to the *Concur Request: Risk Management Setup Guide*.

Field	Description
Approver Editable By	Click the role of the user who can edit the selected approver field for this step on the **Approval Flow** tab in Concur Request – the employee, approver, or both. **NOTES:** • The global setting on the **Settings** tab overrides what you have selected in this field. For example: If you have the **Allow users to select their own approver for requests** field on the **Settings** tab *not* selected ***- and -*** If you have *Employee* or *Both Employee and Approver* selected here ***- then-*** the employee is not allowed to select an approver; the field appears as read-only to the employee. • The approver can still select approvers, even if the global setting is not selected.
Deletable By	Click the role of the user who can delete this step on the **Approval Flow** tab in Concur Request – the employee, approver, or both.
Integration Type	The **Integration Type** field only appears when *Native Integration* is selected in the **Role** field. The Native Integration role and the **Integration Type** field only appear if the Funds and Grants Integration with Concur Solutions is enabled. 📖 For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.
Initial Status	Click the approval status that represents the request status at the time the Step begins, such as Submitted & Pending Approval. The employee can see this status.
Approval Actions	The options that appear here differ depending on the selection made on the **Role** field. Click an action that an approver can make to a request that is awaiting approval. The actions you specify here are visible to the approver in the approvals page in Concur Request. The approver decides which action to take.
Agency Approval Notification	Either: • Click None - if your company does not use this feature. • Click the email that will be sent to the travel agency at this step in the workflow - if your company uses this feature. 📖 Refer to *Email Notifications* in this guide. **NOTE:** Another option is to use the **Agency Last Approval Notification** field on the **Request Policies** page. Using the **Agency Last Approval Notification** field, an email is sent to the agency at ***final*** approval - whether or not the company uses ad-hoc steps after the approver step in the workflow.

Field	Description
Enter Step Employee Notification	Select an email notification to send to the employee when the workflow step is entered. **NOTE:** Enter Step Employee Notification emails are not copied to the employee's delegates.
Email Employee when step is complete	Select (enable) this check box if you want to send a notification email to the employee after this step has completed. **NOTES:** • The employee can turn off the delivery of workflow email notifications in their Request Preferences in Profile. This will suppress all workflow email notifications to that employee ***with the exception of*** the Sent Back to Employee notification and the final Request Approved system notification. • This email feature can be set to localize email content into the employee's language. • Status change email notifications are not sent for auto-approved steps (skipped).
Can exit step with blocking exceptions	Clear (disable) this check box to block the report from progressing past approval in workflow.

3. Click **Save**.

4. To make other changes:

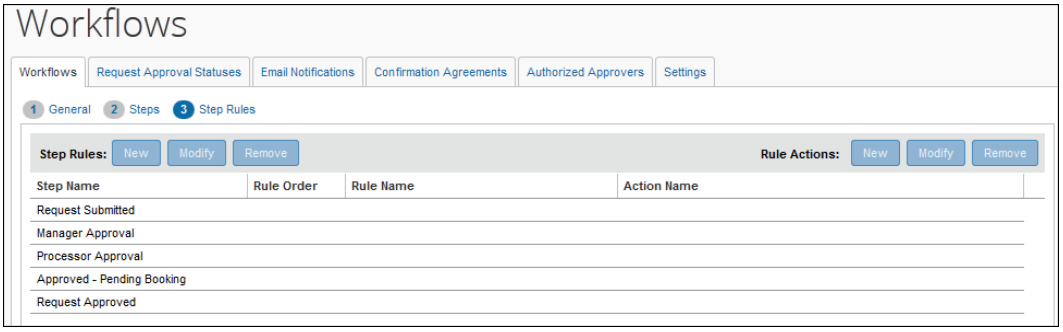
   - To remove any unnecessary workflow steps, click a step and then click **Remove**.

     NOTE: Not all steps can be removed.

   - To modify an existing step, click a step and then click **Modify**.
   - To place the steps in the proper workflow order, use the **Step Order** column.

     NOTE: Not all steps can be reordered.

5. Click **Next**. The **Step Rules** page appears.



Using the Step Rules Page

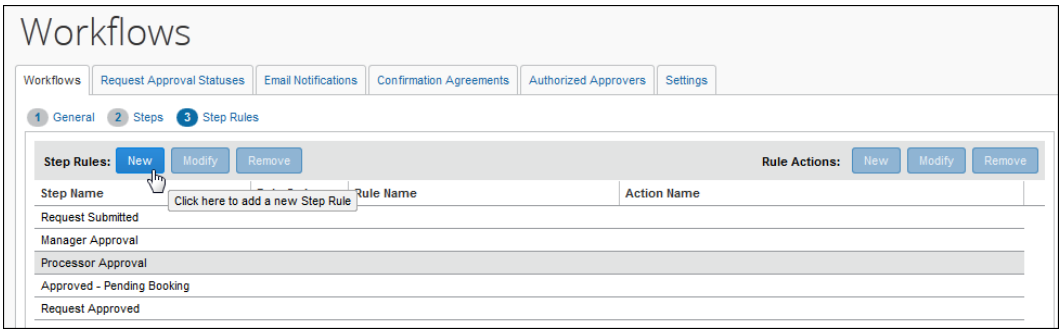
Before working with rules, refer to *Understanding Workflow Rules* in this guide.

This process includes three steps:

1. Name the rule.
2. Create a condition (the "if" portion - "it this happens").
3. Define the action (the "then" portion - "then do this").

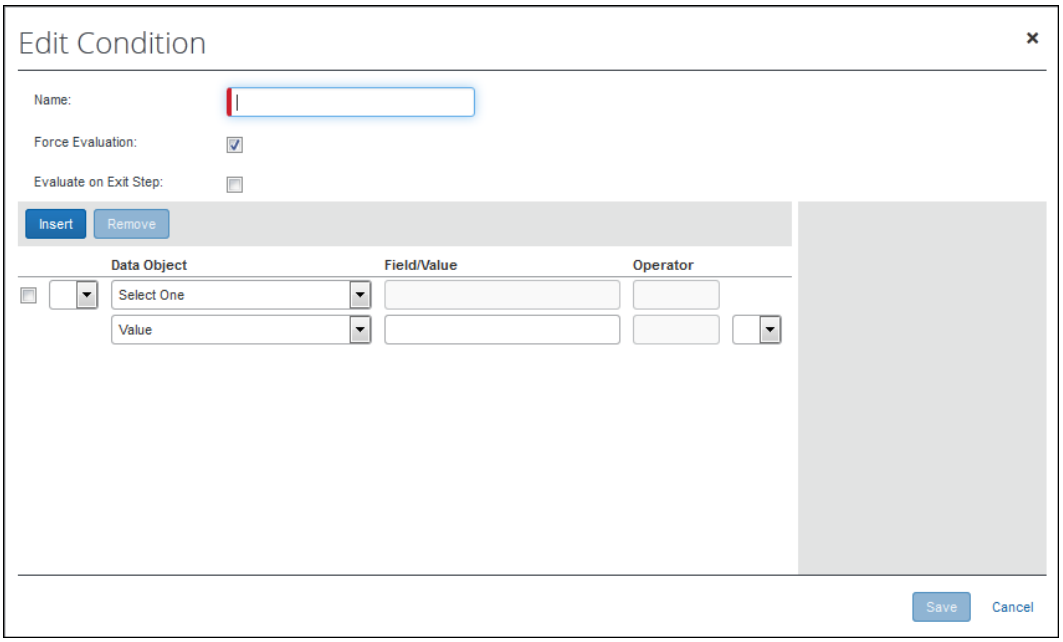
To create a workflow rule:

1. On the **Step Rules** page, click a step name.



NOTE: Not all steps can have rules. If the selected step can have a rule, the **New** button becomes available.

2. Click **New**. The **Edit Condition** window appears.



3. Complete the fields at the top of the window.

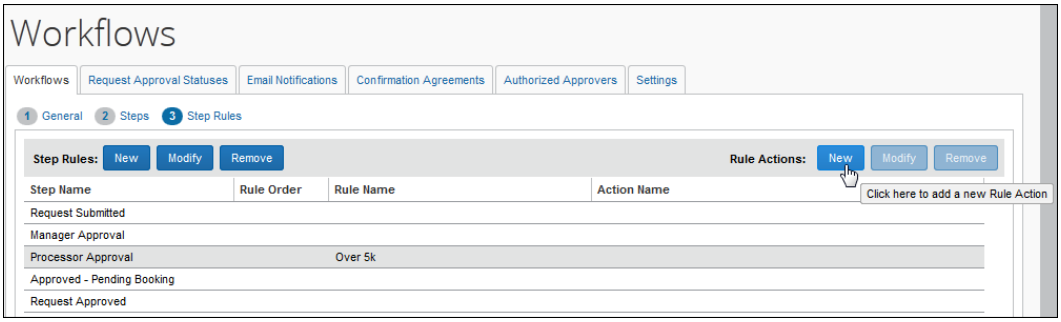
Field	Description
Name	Type any alphanumeric name for the workflow rule. The name does not have to be unique.
Force Evaluation	If clear (disabled), then the rule is evaluated and executed only if all other rules in this step were determined to be false. If selected (enabled) and there are multiple workflow rules, then the rule is evaluated regardless of whether the other rules are false or true.
Evaluate on Exit Step	Select (enable) to have the rule as the user/approver exits the step.

4. Create a condition.

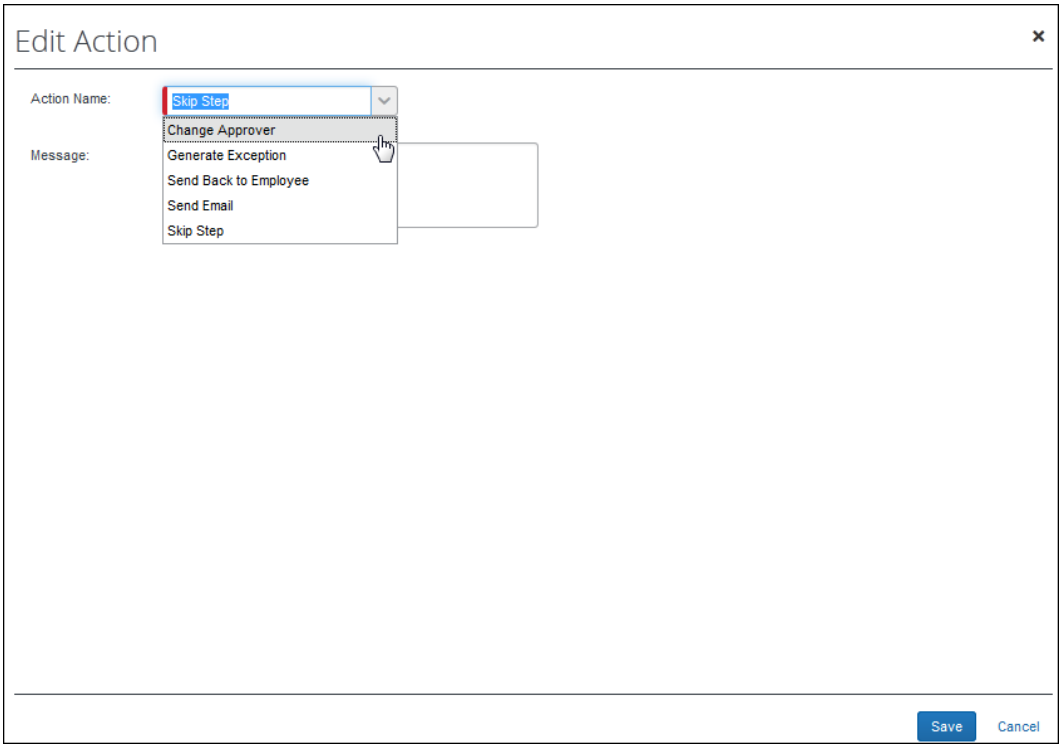
   Refer to *Understanding Workflow Rules* in this guide.

5. In the **Edit Condition** window, click **Save**. The new rule appears on the **Step Rules** page.

6. To add the action, click **New**.



The **Edit Action** window appears.



7. From the **Action Name** list, select the desired action.

NOTE: You may have multiple actions, but they cannot conflict with each other. If the actions conflict, an error message appears.

Once you choose an action from the list, the page refreshes and provides any fields needed for the action you selected.

8. Complete the remaining action field(s).

Action	Description
Change Approver	Select an approver. When the criteria for this condition occur, the system routes the request to the approver designated here.
Generate Exception	Select an exception from the helper pane or create a new one. A message appears to those you designate in the **Visibility** field.
Send Back to Employee	Enter a comment that the employee will see, explaining why the request was returned. This comment is viewable wherever request comments are viewable to the employee and/or approver.

Action	Description
Send Email	Do these two things: • Either: ♦ **Email Address:** Enter an email address. ***– or –*** ♦ **Default Approver:** Select the check box to send the email to the user's default approver, as it appears in the user's profile. **NOTE:** You cannot do both. If you select the **Default Approver** check box, the **Email Address** field becomes unavailable. • Either: ♦ **Email Notification:** Select an email notification (either one of the default notifications or create and use a custom email notification). ***– or –*** ♦ **Email Subject** / **Message:** Enter a subject line and message. **NOTE:** You cannot do both. If you select from the **Email Notification** list, the **Email Subject** and **Message** fields become unavailable.
Skip Step	Type a message in the **Message** field. This message is viewable wherever request messages are viewable to the employee and/or approver.

9. In the **Edit Action** window, click **Save**.
10. When done with all rules and actions, click **Done** on the **Workflows** tab.

Section 11: Workflow Configuration - Modifying and Deleting

Overview

Depending on your permissions, you may be able to edit or perhaps only view certain workflows.

You can make edits to a workflow at any time; however, note the following:

- The system does not update the workflow for a request that has already been submitted.
- If a request is returned to the user (for example, by the approver) and the user resubmits the request, the new workflow applies.
- If the workflow has been edited to add, delete, or reorder steps between the time the request was created and submitted, the system resets the workflow page to the new configuration (discarding any user changes), and displays a message to the employee advising them of this reset.

Configuration

Modifying Workflow Properties

On the **General** page, you can change any properties associated with that workflow, such as number of days for an approval timeout to be rerouted or whether a workflow can be employee edited.

To modify workflow properties:

1. On the **Workflows** tab, either:
   - Select the desired workflow and click **Modify**.
     – or –
   - Double-click the desired workflow.

   The **General** page appears.

2. Make the necessary changes.

   For details, refer to the *Workflow Configuration – Creating* section in this guide.

3. Click **Done**.

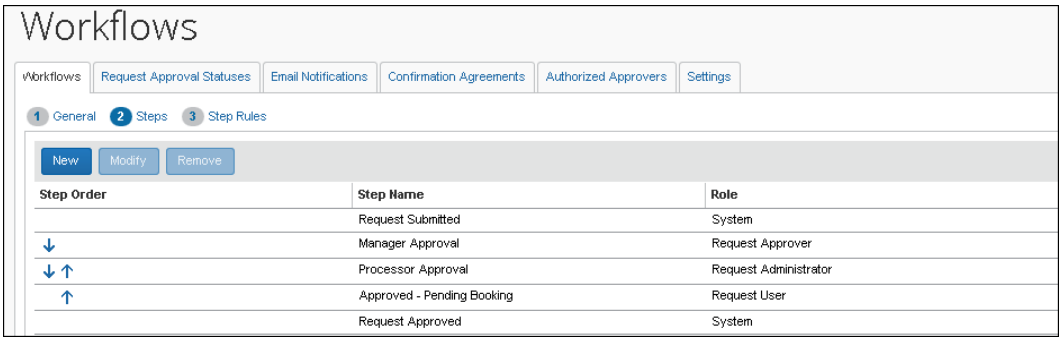
Modifying and Reordering Workflow Steps

To modify or reorder workflow steps:

1. On the **Workflows** tab, either:
   - Select the desired workflow and click **Modify**.
     – or –
   - Double-click the desired workflow.

   The **General** page appears.

2. Click **Steps** at the top of the page.



3. Either:
   - Select the desired step and click **Modify**.
     – or –
   - Double-click the desired step.
4. Make the desired changes.

   For details, refer to the *Workflow Configuration – Creating* section in this guide.
5. Click **Done**.

Modifying Workflow Rules and Actions

To modify a workflow rule or a rule action:

1. On the **Workflows** tab, either:
   - Select the desired workflow and click **Modify**.
     – or –
   - Double-click the desired workflow.

   The **General** page appears.
2. Click **Step Rules** at the top of the page.
3. To modify a rule:
   - Either:
     - Select the desired rule and click **Modify**.
       – or –
     - Double-click the desired rule.
   - Make the desired changes.

     For details, refer to *Workflow Configuration – Creating* in this guide.
   - Click **Save**.
4. To modify a rule action:
   - Either:
     - Select the desired rule action and click **Modify**.
       – or –
     - Double-click the desired rule action.
   - Make the desired changes.

     For details, refer to *Workflow Configuration – Creating* in this guide.

- Click **Save**.

5. Click **Done**.

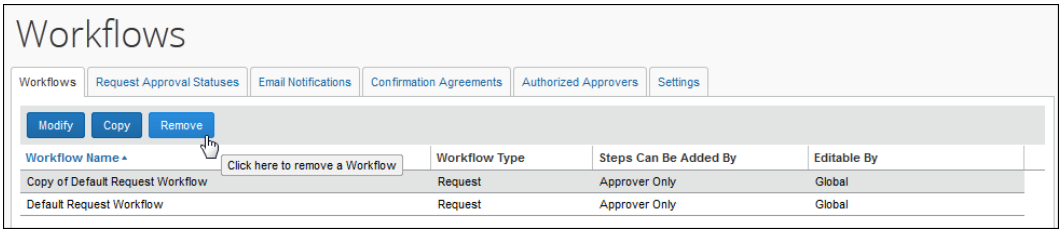
Deleting a Workflow or Workflow Steps

You can delete a request workflow or workflow steps if:

- The request workflow was created for use by your group or you are the global administrator.
- The request workflow is ***not*** currently assigned to a request policy. The system does not allow you to delete a workflow that is currently assigned to a policy. To delete a workflow that is currently in use, you must unassigned it from that policy.

To delete a workflow:

1. On the **Workflows** tab, click the desired workflow.



2. Click **Remove**.

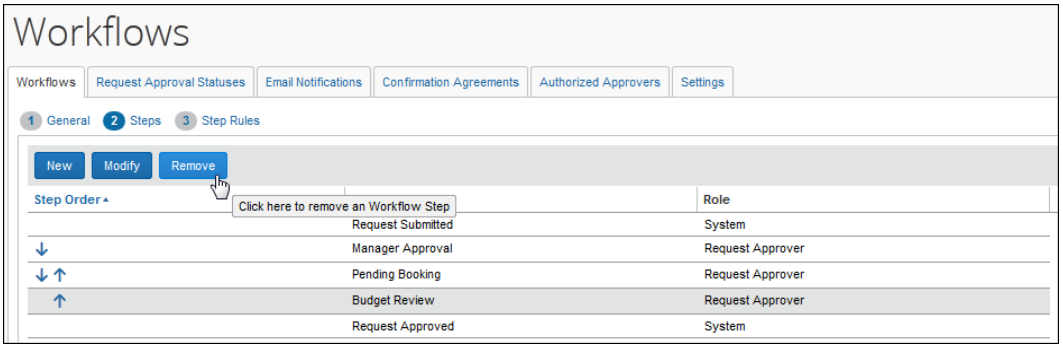
To delete workflow steps:

1. On the **Workflows** tab, either:
   - Select the desired workflow and click **Modify**.
     – or –
   - Double-click the desired workflow.

   The **General** page appears.

2. Click **Steps** at the top of the page.

3. Click the desired step.



4. Click **Remove**.

5. Click **Done**.

Section 12: Workflow – Special Situations

Prevent Approval After the Approval Time Limit

Overview

By default, it is possible for a request approver to approve a request after the defined approval time limit. For example, assume that Concur Request is integrated with Concur Travel so the user accesses Concur Travel to initiate the requested trip. In Concur Travel, the user is notified that the request must be approved by a certain date/time or the trip will be cancelled. The user accesses Concur Request and submits the corresponding request but – for some reason – the request approver does not approve the request in time.

By default, the approver can – even after the final date/time – open and approve the request. Using the configuration steps shown below, clients can create a workflow step rule to prevent the approver from approving the request after the approval time limit.

Configuration / Feature Activation

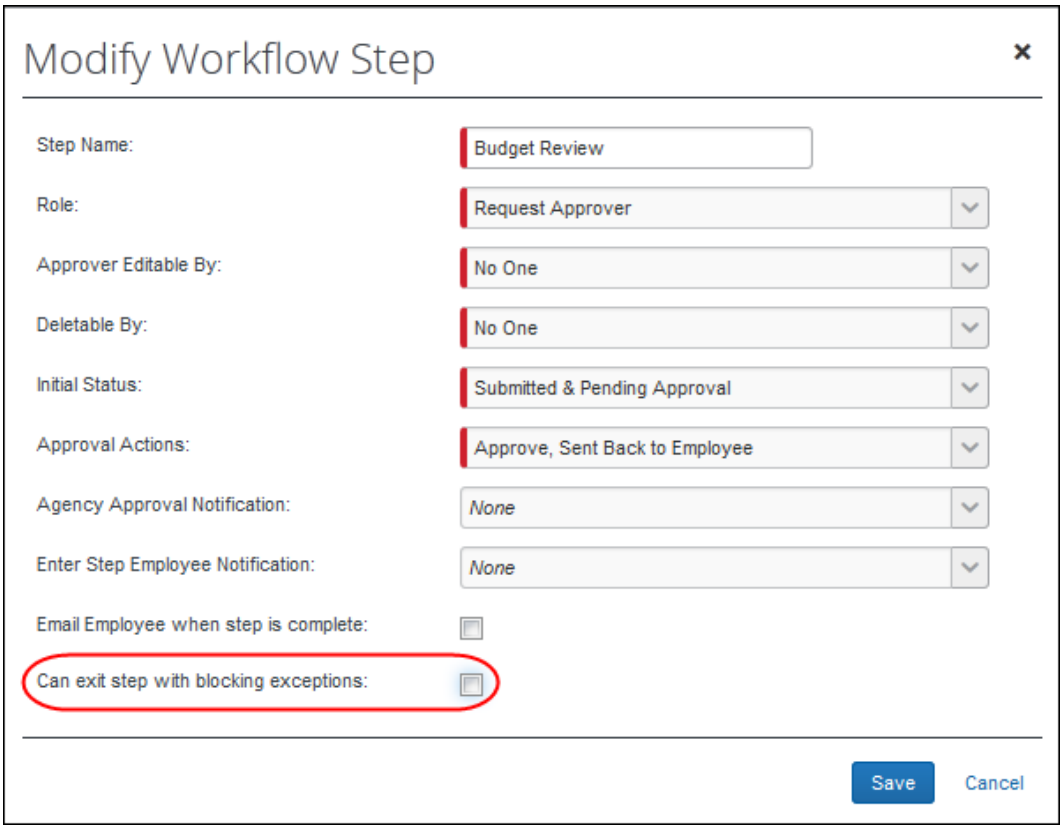
The basic process is this: The admin creates a workflow step and step rule that checks to see if the approval time limit is in the past. If it has, then the step rule creates a blocking exception.

To do so:

1. Click **Administration** > **Request** > **Workflows**.

2. On the **Workflows** tab, double-click the desired workflow.

3. On the **Steps** page, double-click the desired step. The **Modify Workflow Step** window appears.

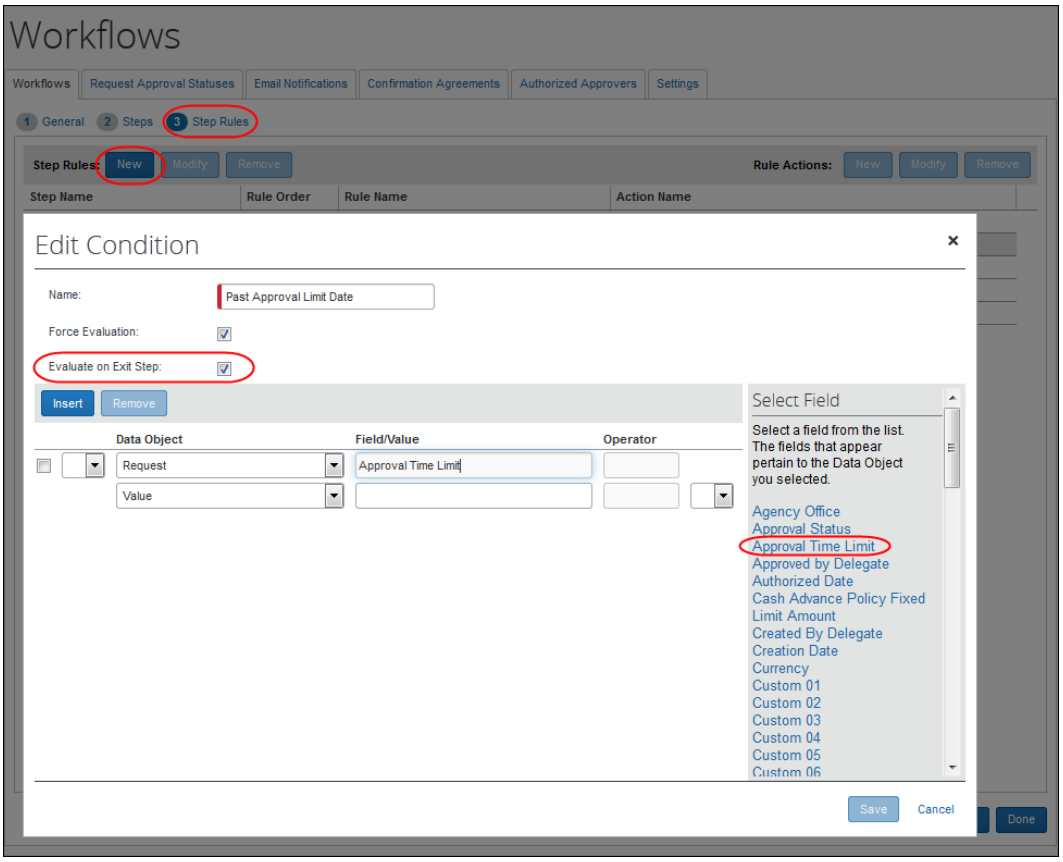


- Ensure that the **Can exit step with blocking exceptions** check box is cleared (disabled).

NOTE: This step ensures that the approver cannot bypass the blocking exception.

- Click **Save**.

4. On the **Step Rules** page, click the desired step and click **New**. The **Edit Condition** window appears.



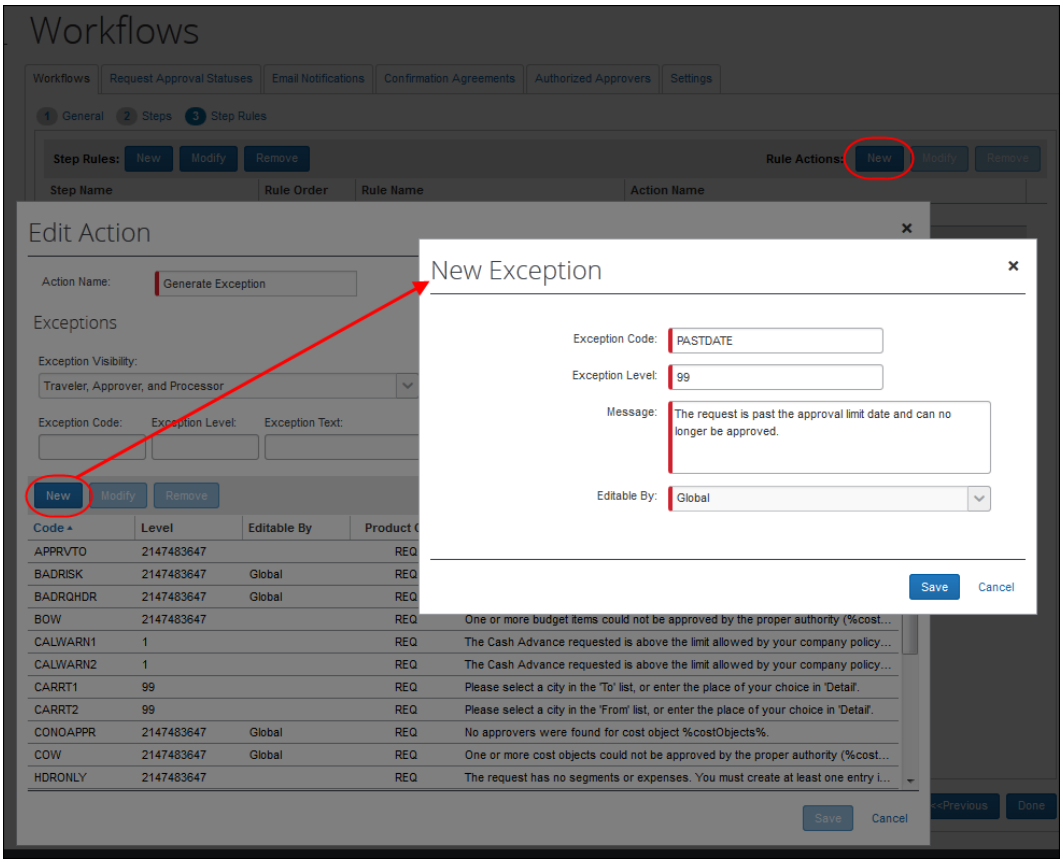
- Name the condition.
- Select (enable) the **Evaluate on Exit Step** check box.

NOTE: The condition evaluates the date ***and*** time. This setting ensures it evaluates at the time the approver exits (attempts to approve the request). So, if the approver *opens* the request within the proper time period but leaves it open – they cannot approve after the deadline has passed.

- In the **Data Object** list, click *Request*.
- In the **Field/Value** list, click *Approval Time Limit*.
- In the **Operator** list, click *Any* and then *Is now or in the past (time compared to GMT)*.
- Click **Save**.

5. Click the desired step and click **New** in the **Rule Actions** area. The **Edit Action** window appears.

6. In the **Exceptions** area of the **Edit Action** window, click **New** to create a new exception. The **New Exception** window appears.



- Enter a name.
- Enter an exception level (blocking) that prevents approval/submission.
- Enter a message.
- Click **Save**.

7. Select the new exception message for the rule and click **Save**.

Section 13: Workflow – Event Notifications

Overview

Event notifications can be configured for any editable workflow step. When a request reaches a specific step in a workflow that is configured for external notifications, a third-party application is notified of the event. Event notifications are always sent for certain events, but additional steps may be configured to be included in the notifications to meet company-specific needs.

Please refer to the SAP Concur Developer Center for additional information about the event subscription service (ESS).

Configuration

To create event notifications, you must configure them at the workflow step level.

External validation steps may be created as well, where the role assigned to the step is an external system and that system is prompted to complete the required action on the corresponding request.

Configuring an event notification

To configure an event notification

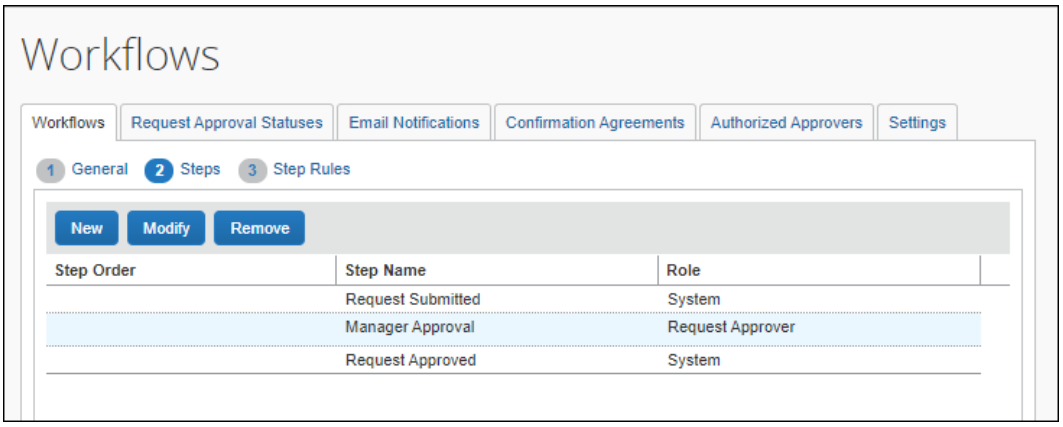
1. Click **Administration > Request > Request Admin > Workflows**. The **Workflows** page opens on the **Workflows** tab.

2. Select the workflow you want to modify. Once selected, the row turns blue and the **Modify** button becomes available.

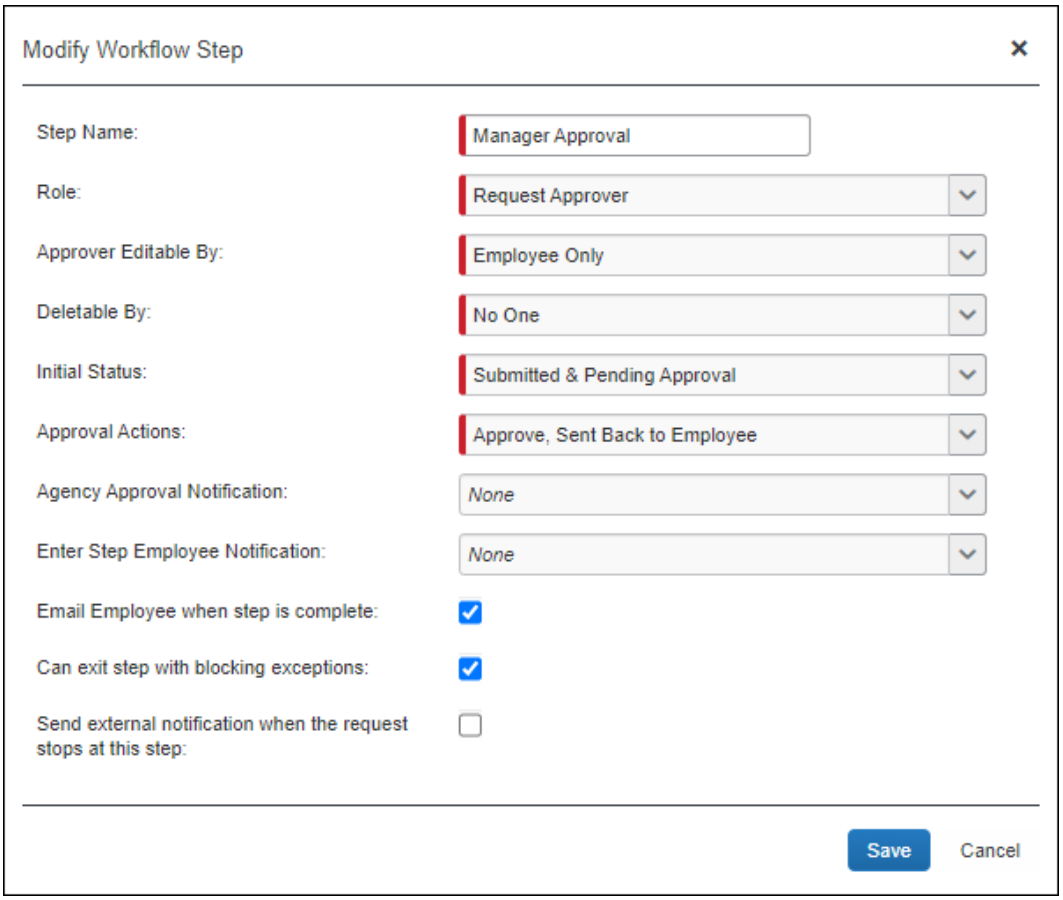
3. Click **Modify**.

4. Click **Steps** to open the **Steps** section of the **Workflows** tab.

5. Select the step where you want to create an external notification. Once selected, the step's row is highlighted.



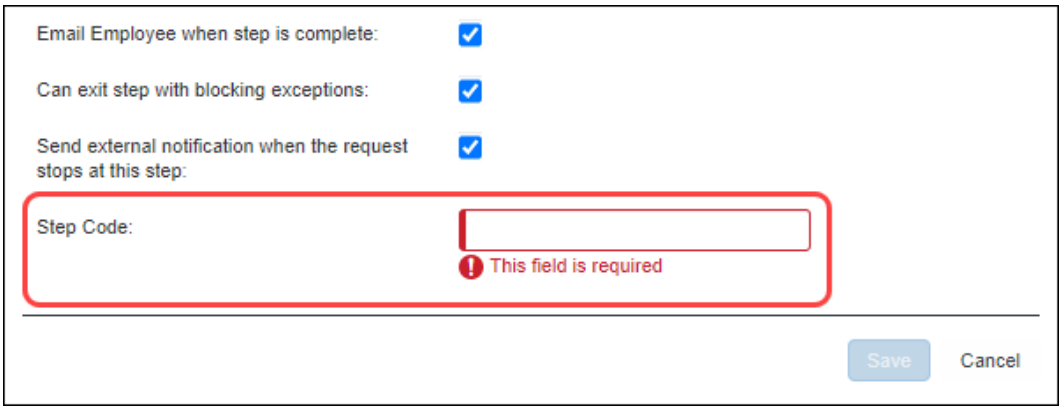
6. Click **Modify**. The **Modify Workflow Step** dialog opens.



NOTE: The **Send external notification when the request stops at this step** option is only available for steps you can modify in the workflow.

7. Select (enable) the **Send external notification when the request stops at this step** check box.

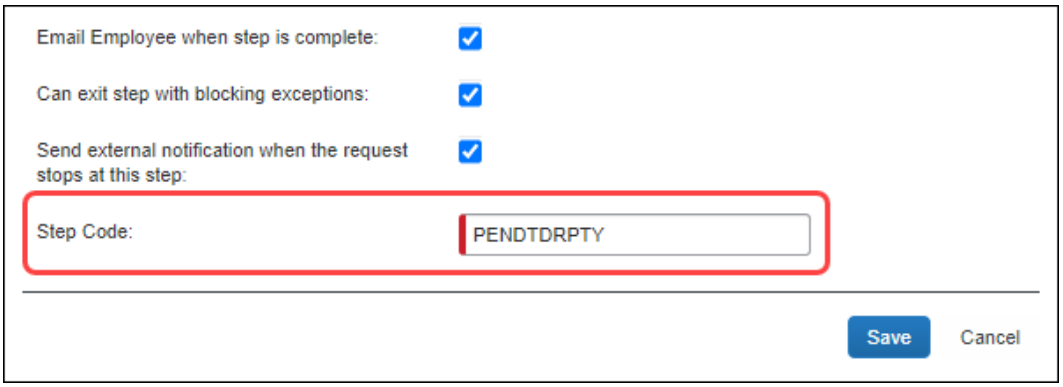
   When the check box is selected, the **Step Code** field displays.



8. In the **Step Code** field, enter a business code that is meaningful to the system subscribing to the event notifications.

   The **Step Code** displays as an attribute in the event scheme of the notification message that the third-party application receives. It can be used to filter the events for a particular workflow step when multiple workflow steps are configured for notifications with unique step codes. In the following example, **PENDTRDPTY** is equal to the event, Third-Party approval.

NOTE: The **Step Code** field has a 10-character limit.



9. Click **Save**.

   The workflow step is now configured to send an external notification when a request reaches the corresponding step in the workflow.

Configuring an external validation step

To configure an external validation step:

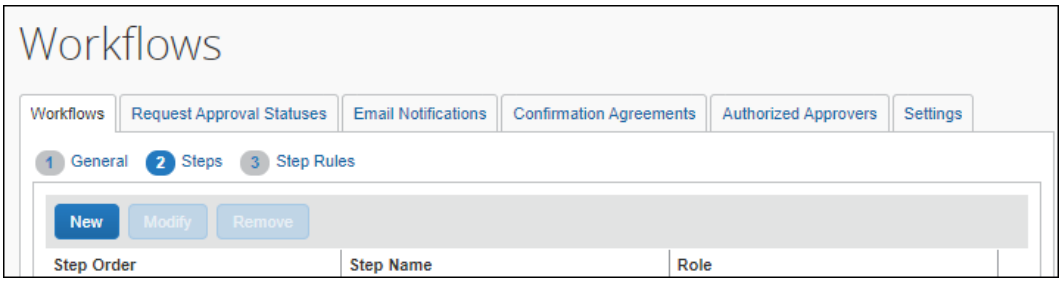
1. Click **Administration > Request > Request Admin > Workflows**. The **Workflows** page opens on the **Workflows** tab.

2. Select the workflow you want to modify. Once selected, the row turns blue and the **Modify** button becomes available.

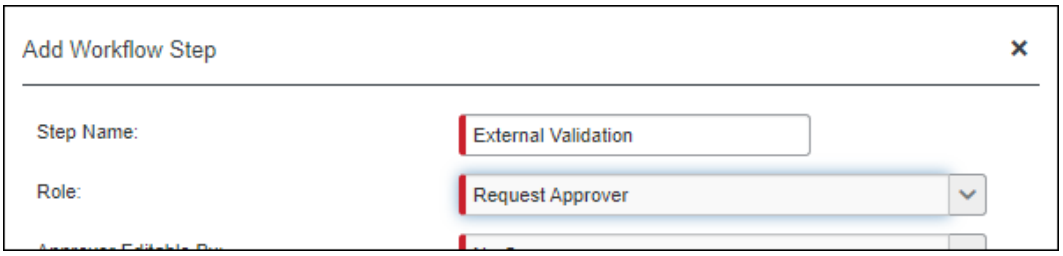
3. Click **Modify**.

4. Click **Steps** to open the **Steps** section of the **Workflows** tab.

5. Click **New** to create a new step. The **Add Workflow Step** dialog opens.



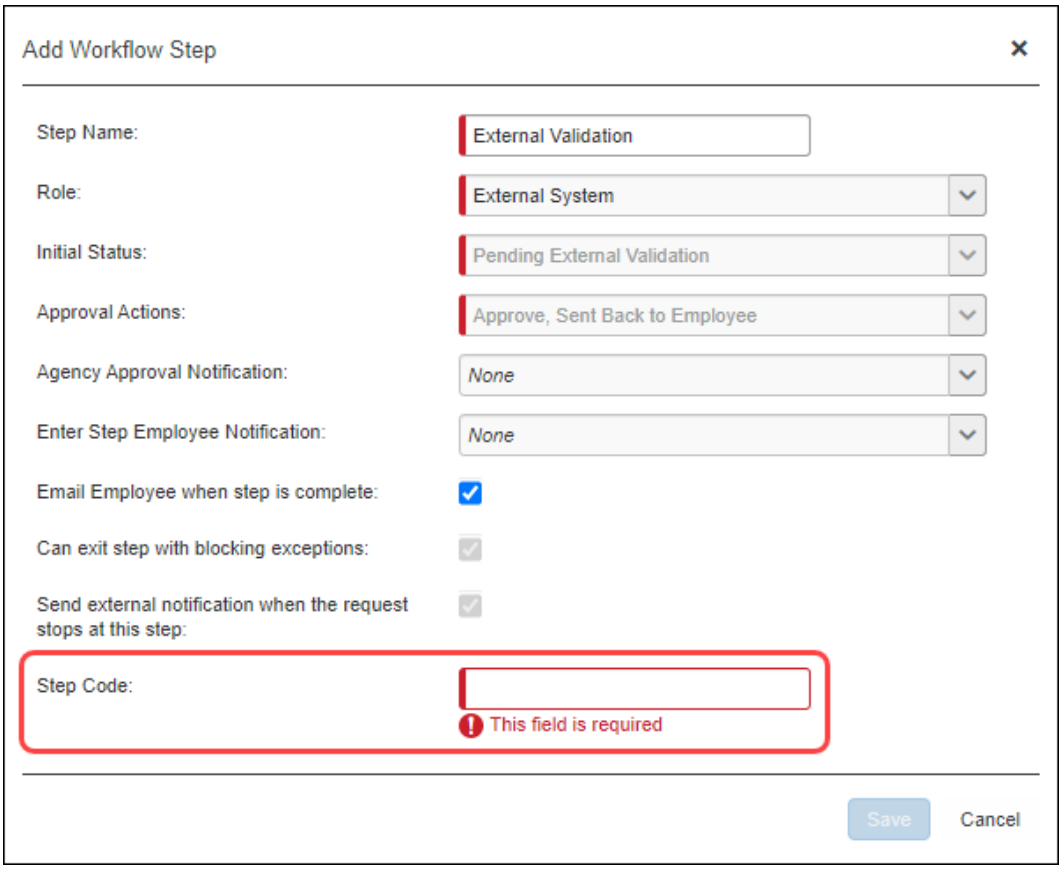
6. In the **Step Name** field, enter a name for this step.



7. In the **Role** list, select *External System*.

NOTE: When the *External System* role is selected, the SAP Concur administrator can configure any workflow step prior to extract as an external validation step. In addition, the workflow step is no longer limited to its order in the steps in the workflow; the workflow step can be moved up and down, and multiple External System steps may be configured in the same window.

When *External System* is selected, the **Step Code** field displays.

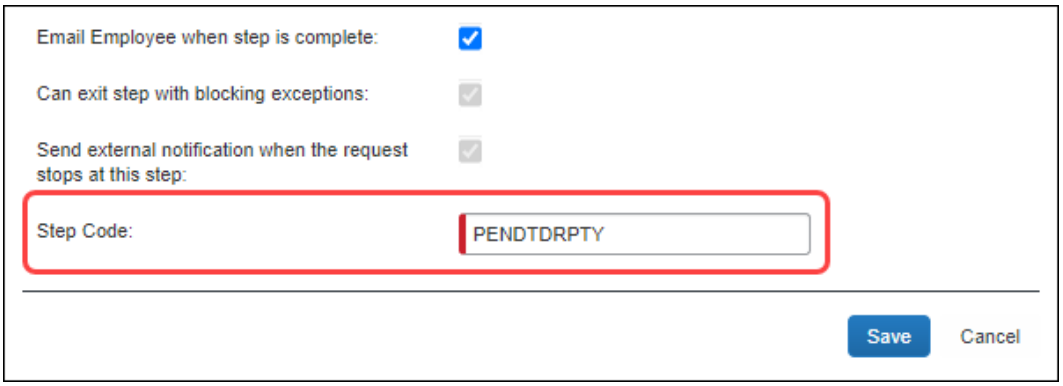


The step code serves as a filter for the third-party system to take action when the notification for this specific step is received. Clients define the **Step Code** based on their business needs (for example, PENDTRDPTY for pending third-party approval).

8. In the **Step Code** field, enter a business code that is meaningful to the system subscribing to the event notifications.

   The **Step Code** displays as an attribute in the event scheme of the notification message that the third-party application receives. It can be used to filter the events for a particular workflow step when multiple workflow steps are configured for notifications with unique step codes. In the following example, **PENDTRDPTY** is equal to the event, Third-Party approval.

NOTE: The **Step Code** field has a 10-character limit.



9. Click **Save**.

   The workflow step is now configured to send an external notification when a request reaches the corresponding step in the workflow. The request will remain in this workflow step until the external system approves or returns the request to the employee via API calls.

   For more information about the Pending External Validation status, refer to the *Request Approval Statuses* section in this guide.

Section 14: Request Approval Statuses

Overview

These are the default request approval statuses.

Approval Status	Description
Approval Time Expired	The request expired in the approval queue.
Approved	The appropriate managers have approved the request. The system does not set this status until all workflow steps that require manager approval have been completed.
Approved – Pending Booking	The request has been approved and is ready to be booked in Concur Travel. This status only appears for clients who have Concur Request integrated with Concur Travel. 📖 For more information, refer to the *Integrated with Travel* section of this guide.
Canceled	The request was canceled.
Not Submitted	The request has not been submitted and has not entered a workflow process.
Pending External Validation	This status is associated with the External Validation feature. For more information about this custom feature, refer to the *Configuring an external validation step* section of this guide. If you see this status and you are using the External Validation feature, refer to: • https://developer.concur.com/event-topics/request/v4.request-events.html for more information on receiving request events • https://developer.concur.com/api-reference/request/v4.endpoints.workflow-resources.html for more information on workflow actions for requests pending external validation with External System Validation The External System role should be the preferred role to use for this approval status in the workflow step. **NOTE:** In certain circumstances, the Request Administrator (Processor – non traveler actions) role could also be used for this approval status in the workflow step. If you use the Request Administrator role, the userId will be required for workflow actions. No other roles can be assigned to the Pending External Validation approval status in the workflow step.
Sent Back to Employee	The request is sent back to the employee for more information or correction.
Submitted	An employee has submitted the request.

Approval Status	Description
Submitted & Pending Approval	The request is somewhere in the approval process but has not been approved.

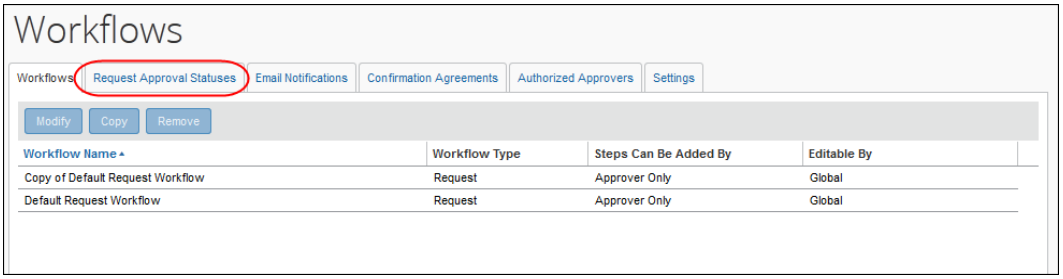
Configuration

Approval actions are actions that a request approver can take for a request that appears in the queue for approval. This is different from workflow rule approval actions, which are actions that are automatically taken upon workflow conditions being met.

Accessing the Request Approval Statuses Tab

To access the page:

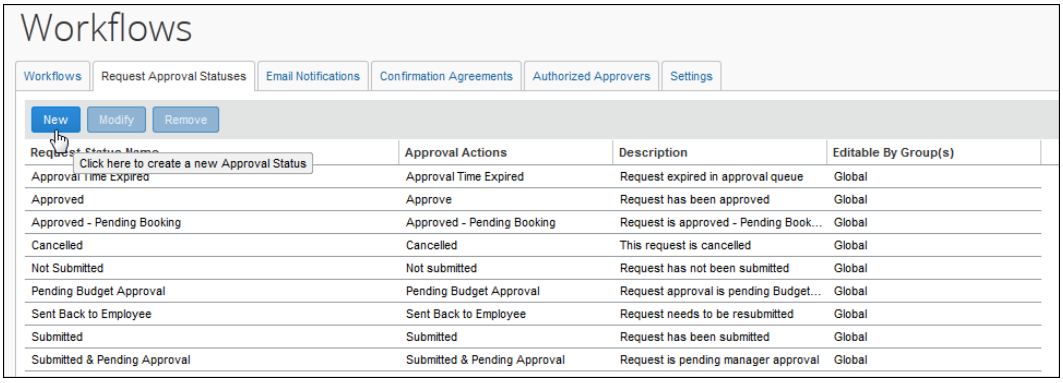
1. Click **Administration** > **Request**.
2. Click **Workflows** (left menu).
3. Click the **Request Approval Statuses** tab.



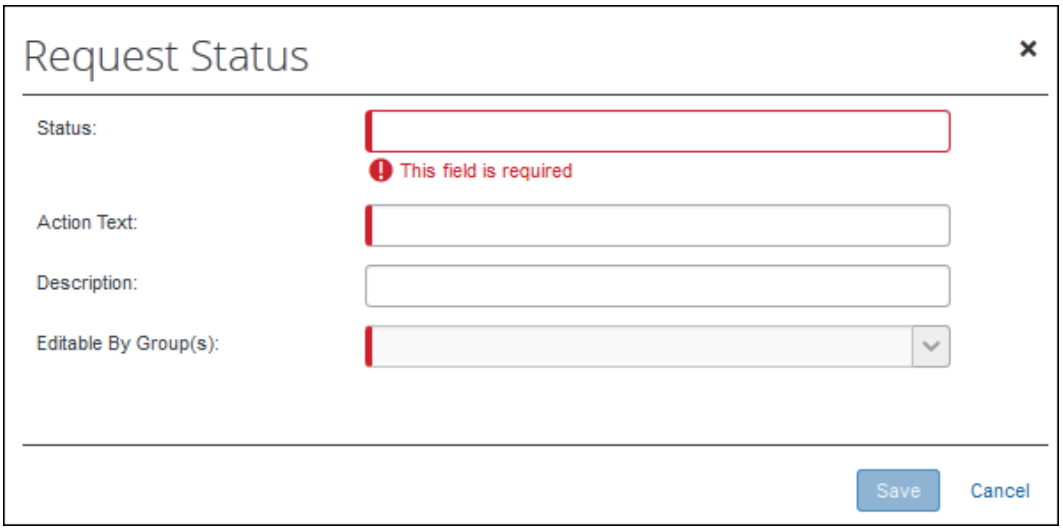
Adding a New Request Approval Status

To add a request approval status:

1. On the **Request Approval Statuses** tab, click **New**.



The **Report Status** window appears.



2. Enter the appropriate information.

Field	Description
Status	Type a name for the new status.
Action Text	Type the action text. This text appears to the approver.
Description	Type the description text.
Editable By Group(s)	Select the group configuration(s) that can edit this workflow.

3. Click **Save**.

Modifying a Request Approval Status

To modify a request approval status:

1. On the **Request Approval Statuses** tab, either:
   - Select the desired status and click **Modify**.
     – or –
   - Double-click the desired status.
2. Make the desired changes.

   For details, refer to *Adding a New Request Approval Status* in this guide.

3. Click **Save**.

Section 15: Email Notifications

Overview

Request email notifications are created by the administrator using the **Email Notifications** tab in Workflows. Email notifications are sent when these request-related actions occur:

Action	Once created, the email is:
Travel agency booking request – sent to the travel agency when the user *submits* the request; travel agency pre-books the trip	Assigned to the request policy using the **Agency Notification** field (Request Policies)
Status change – to let the traveler (and delegate) know when the status of a request changes	Assigned for the appropriate workflow step (Workflows)
Pending approval – to let the approver (and delegate) know if there are requests awaiting approval	
Travel agency approval – sent to the travel agency when the approver *approves* the request; travel agency completes the booking **NOTE**: This option is not supported for Cost Object Approval workflow steps.	
Travel agency approval – sent to the travel agency when the request reaches ***final*** approval; travel agency completes the booking *Final approval* means: • For companies using ad-hoc workflow steps, that is after the final approval. • For companies that do not use ad-hoc workflow steps, that is after the approver has approved the request. **NOTE:** In this case, you get the same result using the "Travel agency approval" notification (mentioned above) that is assigned to a workflow step.	Assigned to the request policy using the **Agency Last Approval Notification** field (Request Policies)
User recall after approval – sent to the travel agency when the user recalls the request after it has been approved	Assigned to the request policy using the **Agency Recall After Approval Notification** field (Request Policies)
Pre-approval cancellation – sent to the travel agency when the user cancels their request after submission but before approval (if cancellation is allowed)	Assigned to the request policy using the **Agency Pre-Approval Cancellation Notification** field (Request Policies – after **Enable Cancellation** is selected)
Post-approval cancellation – sent to the travel agency when the user cancels their request after approval (if cancellation is allowed)	Assigned to the request policy using the **Agency Post-Approval Cancellation Notification** field (Request Policies – after **Enable Cancellation** is selected)

Default Email Notifications

The default workflow email notifications are:

- Agency Booking Request Notification
- Agency Approval Notification
- Agency Recall After Approval Notification
- Agency Pre-Approval Cancellation Notification
- Agency Post-Approval Cancellation Notification
- Pending Notification
- Status Change Notification

NOTE: The *Agency Proposal Available Notification* and the *Agency Confirmation Available Notification* are also default notifications, but they are used with the Agency Proposal feature. For more information, refer to the *Concur Request: Agency Proposals Setup Guide*.

There are several default email notifications used with the Risk Management feature. For more information, refer to the *Concur Request: Risk Management Setup Guide*.

You can use the default notifications or create new ones by copying the default and then editing the copy.

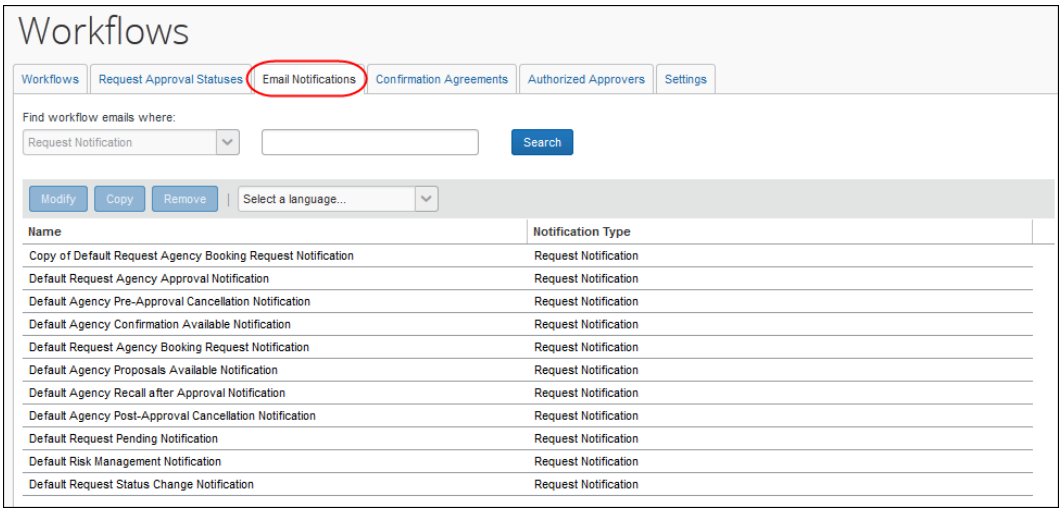
Depending on the type of notification, the configuration includes the **General** step, the **Primary Recipient** step, and *maybe* the **Delegate Recipient**.

- The Agency Booking Request Notification and the Agency Approval Notification go to the primary recipient only. The primary recipient is the travel agency.
- The Pending Notification goes to the primary recipient and the delegate recipient. The primary recipient is the approver; the delegate recipient is the approver's delegate (if there is one).
- The Status Change Notification goes to the primary recipient and the delegate recipient. The primary recipient is the traveler (user); the delegate recipient is the traveler's delegate (if there is one).
- The Recall After Approval Notification goes to the primary recipient only. The primary recipient is the travel agency.
- The Pre-Approval Cancellation Notification and the Post-Approval Cancellation Notification go to the primary recipient only. The primary recipient is the travel agency.

Configuration

To access the Email Notifications tab:

1. Click **Administration** > **Request**.
2. Click **Workflows** (left menu).
3. Click the **Email Notifications** tab.



NOTE: The *Default Agency Confirmation Available Notification* and the *Default Agency Proposal Available Notification* appear in this list. They are used with the Agency Proposals feature; refer to the *Concur Request: Agency Proposals Setup Guide.*

Adding an Email Notification

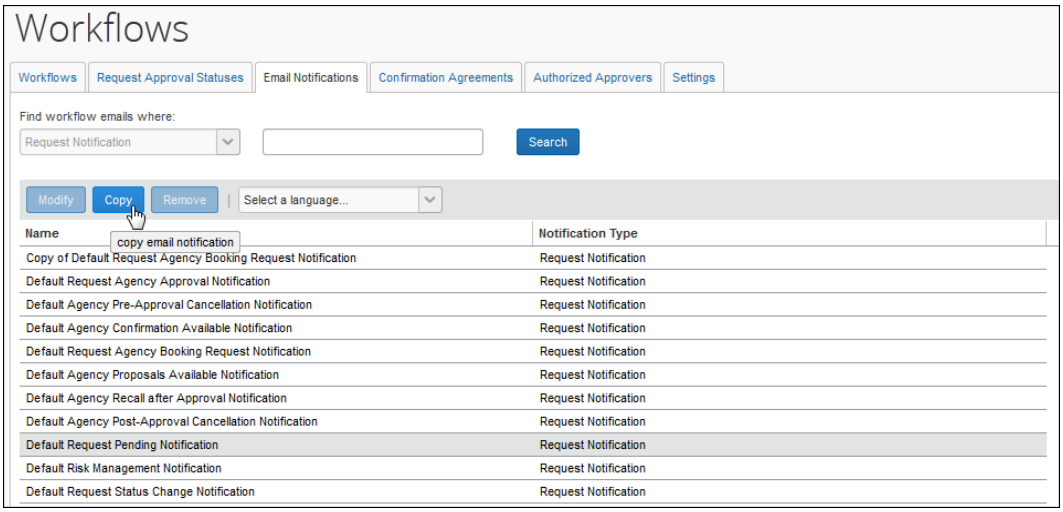
These steps apply to all notifications, however:

- The Travel Request Agency Booking Request Notification, Travel Request Agency Approval Notification, Agency Recall After Approval Notification, Agency Pre-Approval Cancellation Notification, and the Agency Post-Approval Cancellation Notification include the **General** step and the **Primary Recipient** step.
- The Request Pending Notification and the Request Status Change Notification include the **General** step, the **Primary Recipient** step, and the **Delegate Recipient**.

To add a new email notification, copy an existing notification and then edit the copy.

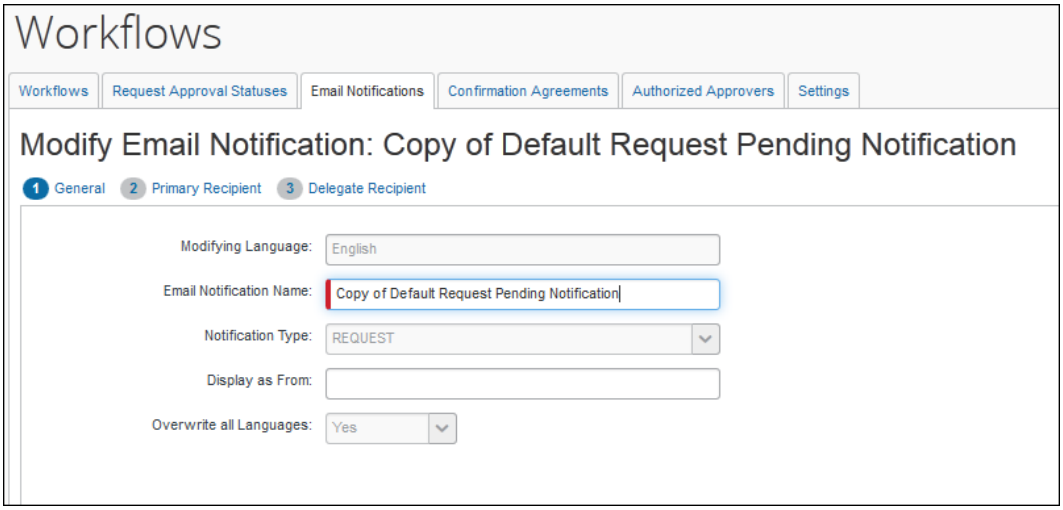
To add an email notification:

1. On the **Email Notifications** tab, click the notification to copy.
2. Click **Copy**.



NOTE: The *Default Agency Confirmation Available Notification* and the *Default Agency Proposal Available Notification* appear in this list. They are used with the Agency Proposals feature; refer to the *Concur Request: Agency Proposals Setup Guide.*

The **General** step of the **Modify Email Notification** page appears.

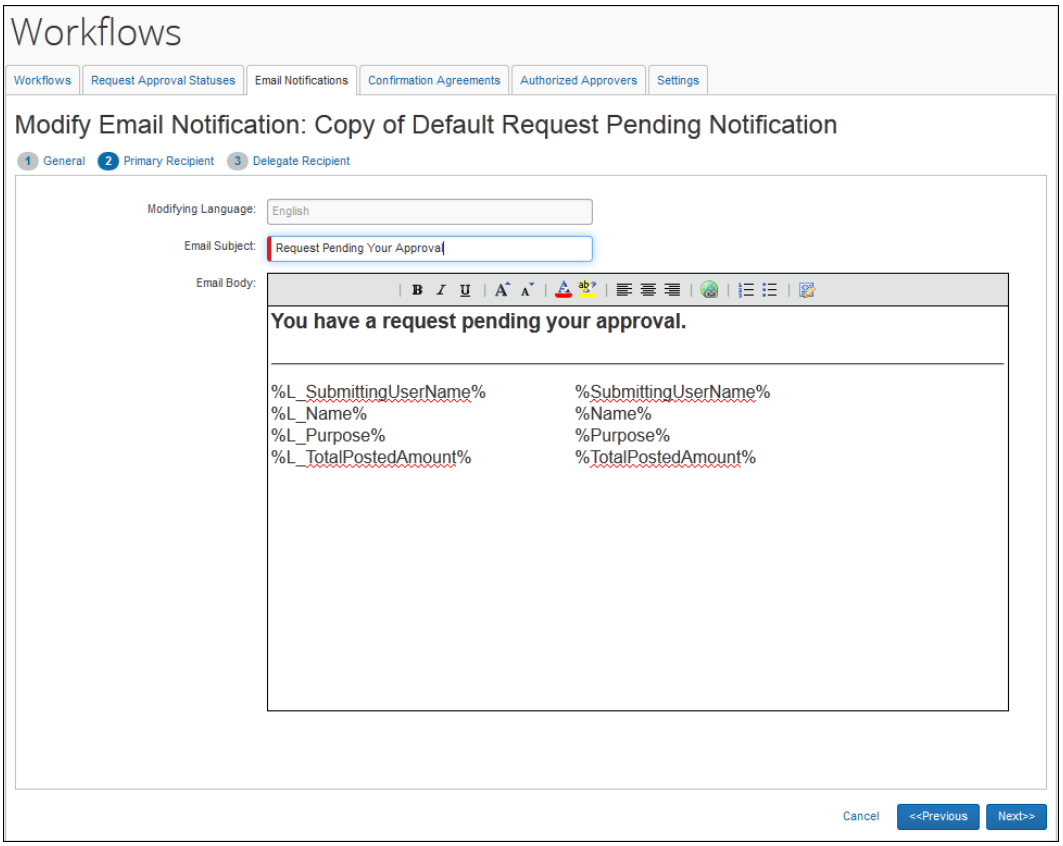


3. The only fields you can edit at this time are:

Field	Description
Email Notification Name	Edit the name as desired.
Display as From	Type the email address you would like the recipient to see when they receive the notification. This address can be used by the recipient to set mailbox rules that prevent automatic spam disposal or allow routing of the email to a designated folder or Forward action.

NOTE: If you need to make changes to the other fields, save this copy and then edit it as detailed in *Modifying an Email Notification* in this guide.

4. Click **Next**. The **Primary Recipient** step appears.



5. Make the desired changes to the **Email Subject** field. You can use "variable" fields to enter specific data in this field.

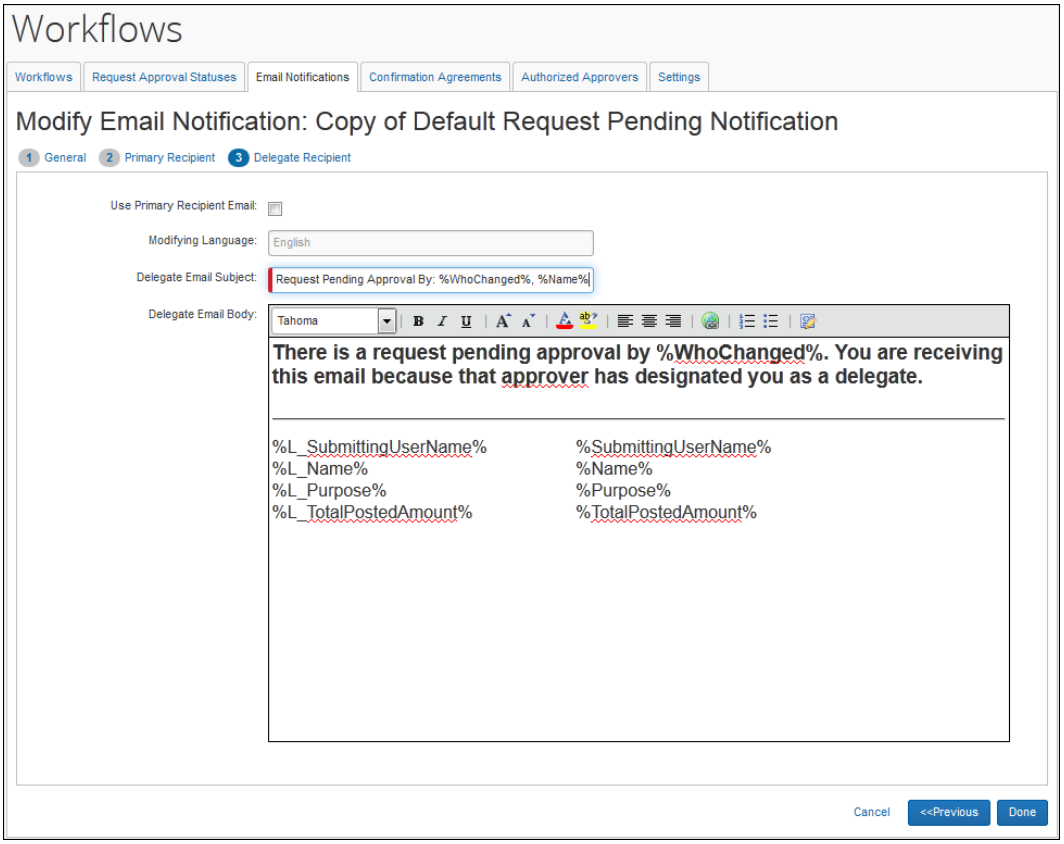
Refer to *Available Data Variables* in this guide for more options.

6. Make the desired changes to the **Email Body** field.
   - You can use "variable" fields to enter specific data in this field.

     Refer to *Available Data Variables* in this guide for more options.
   - Use the toolbar for bold, color, etc.

   - If you are familiar with HTML, you can also view the HTML code and edit it directly. To do so, click the **Source Edit** button at the right end of the toolbar.

7. Click **Next**. The **Delegate Recipient** step appears.



8. Make the desired changes to the **Email Subject** field. You can use "variable" fields to enter specific data in this field.

   Refer to *Available Data Variables* in this guide for more options.

9. Either:
   - If you want the primary recipient email and the delegate email to be the same, select the **Use Primary Recipient Email** check box.
   - If not, make the desired changes to the **Email Body** field. The variable fields and the HTML work the same way is in the primary recipient email.
10. Click **Done**.

Available Data Variables

Data from the request can be added to the email subject or body text, using data variables. These variables are placeholders that will be updated with the actual data when the email is sent. The variables are enclosed in percentage signs, which indicate to the system that they need to be replaced.

The variables can be used to insert the field label or the field value in the email:

- Adding an "L" (L) and underscore (_) to the beginning of the variable name tells the system to replace that variable with the field label.
- Variables without the L and underscore are replaced with the field value.

Certain fields will use the company-specific form field label (if available) instead of the default label.

Example:

The administrator would like the email to display the request name, in the following format:

Request Name: Trip to New York

The administrator can enter this information two ways:

- **Using variables for the label and the data:** The administrator enters the following line of text in the email editor to use the label configured for the field on the form definition applicable to the request.

  %L_Name%: %Name%

  NOTE: If the variable is blank, then neither the label nor the value variables will print in the resulting email.

- **Using text for the label and a variable for the data:** The administrator enters the following line of text in the email editor.

  Request Name: %Name%

The available variables are:

Field Label	Variables	Description
Approval Status Set To	Field Label: %L_StatusName% Field Value: %StatusName%	Status result from current workflow step actions
Approval Comment	Field Label: %L_ApprovalComment% Field Value: % ApprovalComment %	Comments on the request by all approvers.
Approval Limit Date	Field Label: %L_ApprovalLimitDate% Field Value: %ApprovalLimitDate%	Date the approval period expires
Approved Amount*	Field Label: %L_TotalApprovedAmount% Field Value: %TotalApprovedAmount%	Approved amount (at the point in the approval process when the email is generated)
Approved Amount Before Booking	Field Label: %L_TotalApprovedAmountBeforePEBK % Field Value: %TotalApprovedAmountBeforePEBK %	The request approved amount prior to booking travel. This variable is used with the *Approve Then Book* process flow.
Attachment	Field Value: %ATTACHMENT% 📖 Refer to *Including Attachments* below.	
Authorized Date*	Field Label: %L_AuthorizedDate% Field Value: %AuthorizedDate%	Date the request was authorized This field is not used in the request header. It was created for the time when the authorization request will be migrated to Concur Request.
Change Type	Field Value: %ChangeType% 📖 Refer to *Reservation / Modification* below.	Provides the text: • *Reservation* in the initial email • *Modification* in subsequent emails when a modification is performed on an agency managed segment • *Notification* in subsequent emails to the agency if no changes were made to the agency managed segments
Changed By	Field Label: %L_WhoChanged% Field Value: %WhoChanged%	Employee name from workflow step

Field Label	Variables	Description
Creation Date	Field Label: %L_CreationDate% Field Value: %CreationDate%	Date the request was created
Custom 1-20*	Field Label: %L_CustomXX% Field Value: %CustomXX%	Value in the custom fields, where XX is the number of the custom field
CWT "Clipper" Agency Proposal	Field Label: %L_CWT_Clipper_XML_Attachment% Field Value: %CWT_Clipper_XML_Attachment%	The request information for CWT "Clipper". This variable must be added to the email notification selected in the **Agency Notification** field of the policy. Only works with the French-France language.
End Date*	Field Label: %L_EndDate% Field Value: %EndDate%	End date of the request
End Time*	Field Label: %L_EndTime% Field Value: %EndTime%	End time of the request
First Approved Date*	Field Label: %L_FirstApproveDate% Field Value: %FirstApproveDate%	Date the request was first approved
Highest Country Risk Level	Field Label: %L_HighestCtryRiskLevel% Field Value: %HighestCtryRiskLevel%	Maximum country risk level on the request
Main Destination	Field Label: %L_MainDestination% Field Value: %MainDestination%	Main destination as it appears on the request header Displayed <City Name>, <Country Name or SubDivision Name>
Printed report	Field Value: %PRINT_<PFC_CODE>_XXXX% 📖 Refer to *Including the Printed Report* below.	
Purpose*	Field Label: %L_Purpose% Field Value: %Purpose%	Information in the **Purpose** field on the request
Request Comments	Field Label: %L_RequestComments% Field Value: %RequestComments%	Comments on the request header by any user (request owner, approver, or agent).
Request Date	Field Label: %L_StartDate% Field Value: %StartDate%	Start date of the request
Request Date*	Field Label: %L_UserDefinedDate% Field Value: %UserDefinedDate%	Date indicated on the request

Field Label	Variables	Description
Request From	Field Label: %L_SubmittingUserName% Field Value: %SubmittingUserName% **NOTE:** This field label and field value are not currently available in Concur Request. Do not use them in email notifications.	Employee that submitted the request (delegate or proxy)
Request From	Field Label: %L_EmpName% Field Value: %EmpName%	Employee name
Request ID	Field Label: %L_RequestId% Field Value: %RequestId%	Request unique identifier
Request Name*	Field Label: %L_Name% Field Value: %Name%	Name of the request
Requested Amount*	Field Label: %L_TotalPostedAmount% Field Value: %TotalPostedAmount%	Total amount requested
Segment Comments	Field Label: %L_SegmentComments% Field Value: %SegmentComments%	Comments of all segments
Start Date*	Field Label: %L_StartDate% Field Value: %StartDate%	Start date of the request
Start Time*	Field Label: %L_StartTime% Field Value: %StartTime%	Start time of the request
Submit Date	Field Label: %L_SubmitDate% Field Value: %SubmitDate%	Date the request was submitted
Total Remaining Amount	Field Label: %L_TotalRemainingAmount% Field Value: %TotalRemainingAmount%	Total amount remaining on the request
Total Post Approved Amount	Field Label: %L_TotalPostApprovedAmount% Field Value: %TotalPostApprovedAmount%	The total amount of the request, including any updates that happened after approval.
User Comment	Field Label: %L_UserComment% Field Value: %UserComment%	The request owner's comments at the request header level.
*These fields use the configured form field label, if available, instead of the default label.		

INCLUDING A LINK TO THE REQUEST

The email notification can include a link to the specified request. If this feature is enabled, the link also appears in the Email Reminders. This functionality must be enabled by SAP Concur staff. Contact SAP Concur support for more information.

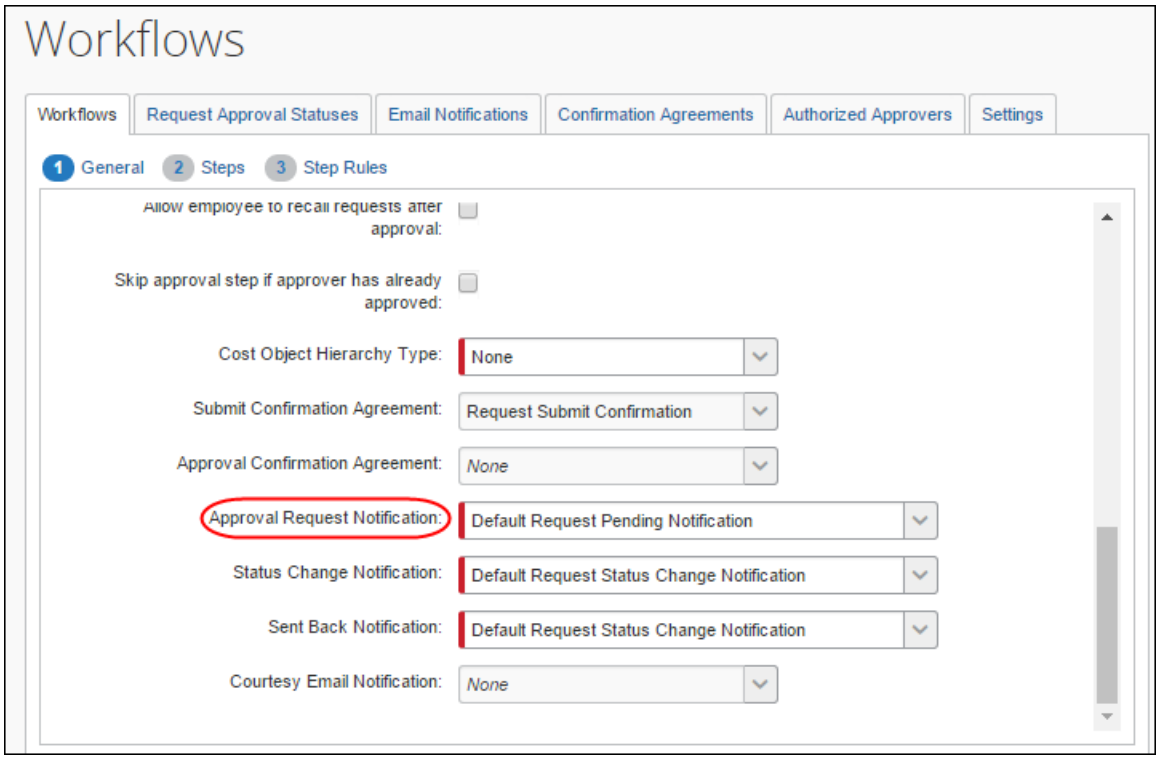
NOTE: This functionality is only available for clients that use SSO and can only be added to email notifications sent to the request approver.

Configuration (Completed by SAP Concur - Internal Only)

To add the link to the request to the approver email:

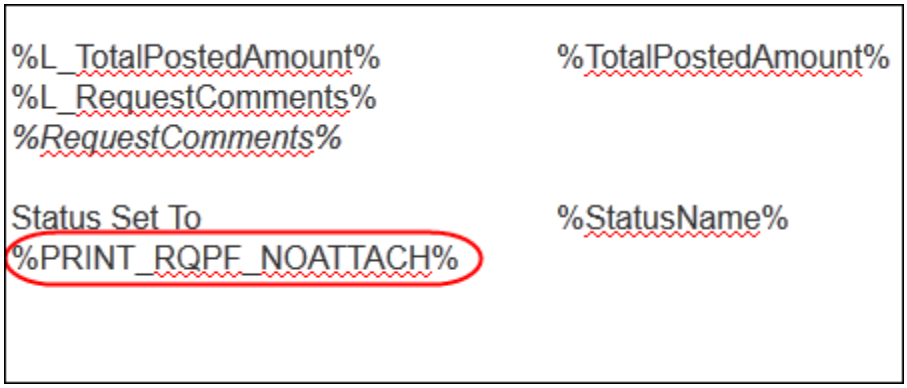
1. In the hosted management console, navigate to the **Settings** page for the company.
2. Set the **Use the CTE email URL?** setting to *Yes*.
3. Set the **URL used in CTE email** setting to the correct datacenter URL for the company.
4. Click **Save**.

The link will appear in the email notification configured as the **Approval Request Notification** in Workflows:



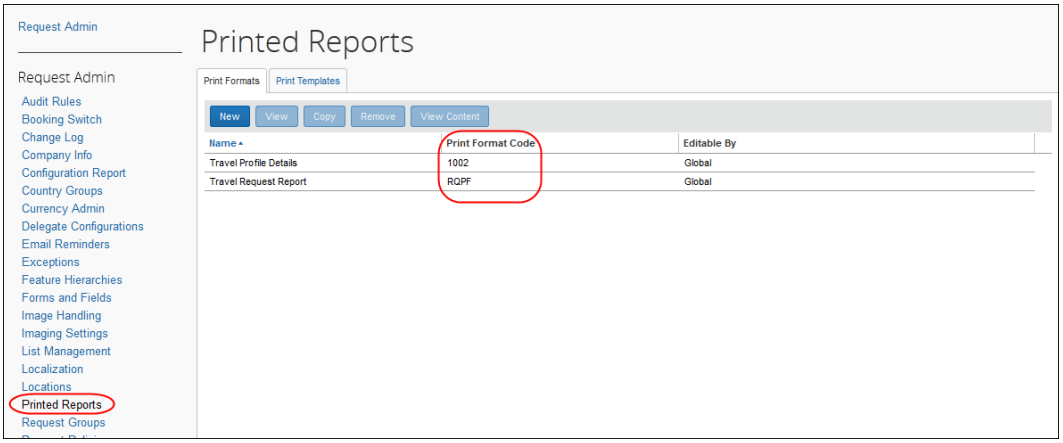
INCLUDING THE PRINTED REPORT

By default, the printed report is included in the two agency email notifications, but it can be added to the other notifications if desired.



The code is %PRINT_<PFC_CODE>_XXXX%

where <PFC_CODE> is the print format code (the default printed report is RQPF)



where XXXX is either:

<ATTACH>: The printed report is attached as a file to this email.

<NOATTACH>: The printed report is inserted into email body (default).

The printed report can be added to the approval emails and can include the Travel Details section (for requests with a PNR) to show the approver if the trip includes a policy violation.

Travel Details section if the trip is not policy compliant:

Itinerary Rule Violation
Itinerary messages - Require Approval

Flight Rule Violation
This price is more than twice the cheapest one. It is not allowed by your Travel policy. - Require Passive Approval

Violation Reason Code:
YC - Refusal of the cheapest rate due to the airline preference

Booker Comments
I like to pay more

Airfare quoted total:
73.96
Ticket non-refundable - penalties may apply

†Charles De Gaulle Intl Arpt (CDG) to Heathrow (LHR)

Flight: † Flight # 307 Y
Operated by: BA
Departure: Charles De Gaulle Intl Arpt (CDG) Fri 02/19/2016 at 10:20 AM
Arrival: Heathrow (LHR) Fri 02/19/2016 at 10:45 AM
Stops: Nonstop

Best Options

Category	Price	Vendor	Cities	Stops:
Best Price with the Fewest Stops	EUR 56.00 †		FRP-GBS	0
Least cost logical	EUR 56.00 †		FRP-GBS	0

Travel Details section if the trip is policy-compliant:

This trip conforms to the company's Travel policy, there are no policy violations to display.

For more information, refer to the *Concur Requests: Printed Reports Configuration Setup Guide*.

INCLUDING ATTACHMENTS

To include the header-level attachment with the email, add %ATTACHMENT% in the email body.

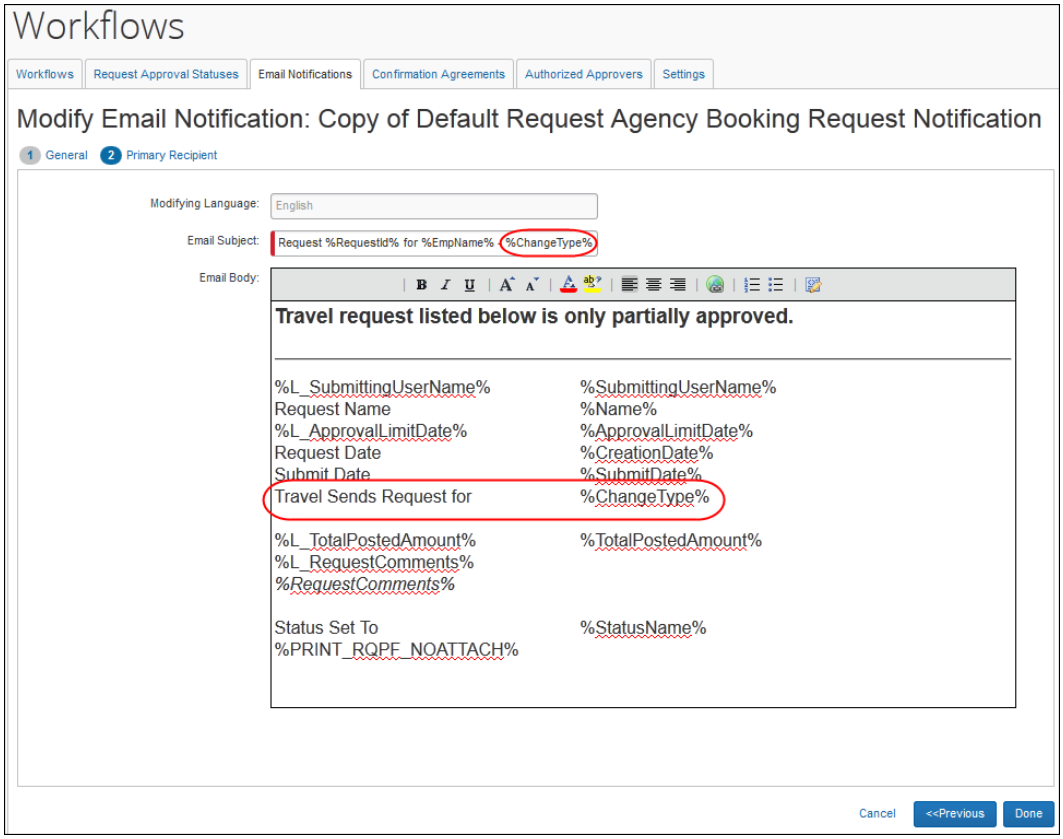
NOTE: If there is more than one attachment with the request, all attachments are combined into one PDF and sent with the email notification.

%L_TotalPostedAmount% %TotalPostedAmount%
%L_RequestComments%
%RequestComments%

Status Set To %StatusName%
%PRINT_RQPF_NOATTACH%
%ATTACHMENT%

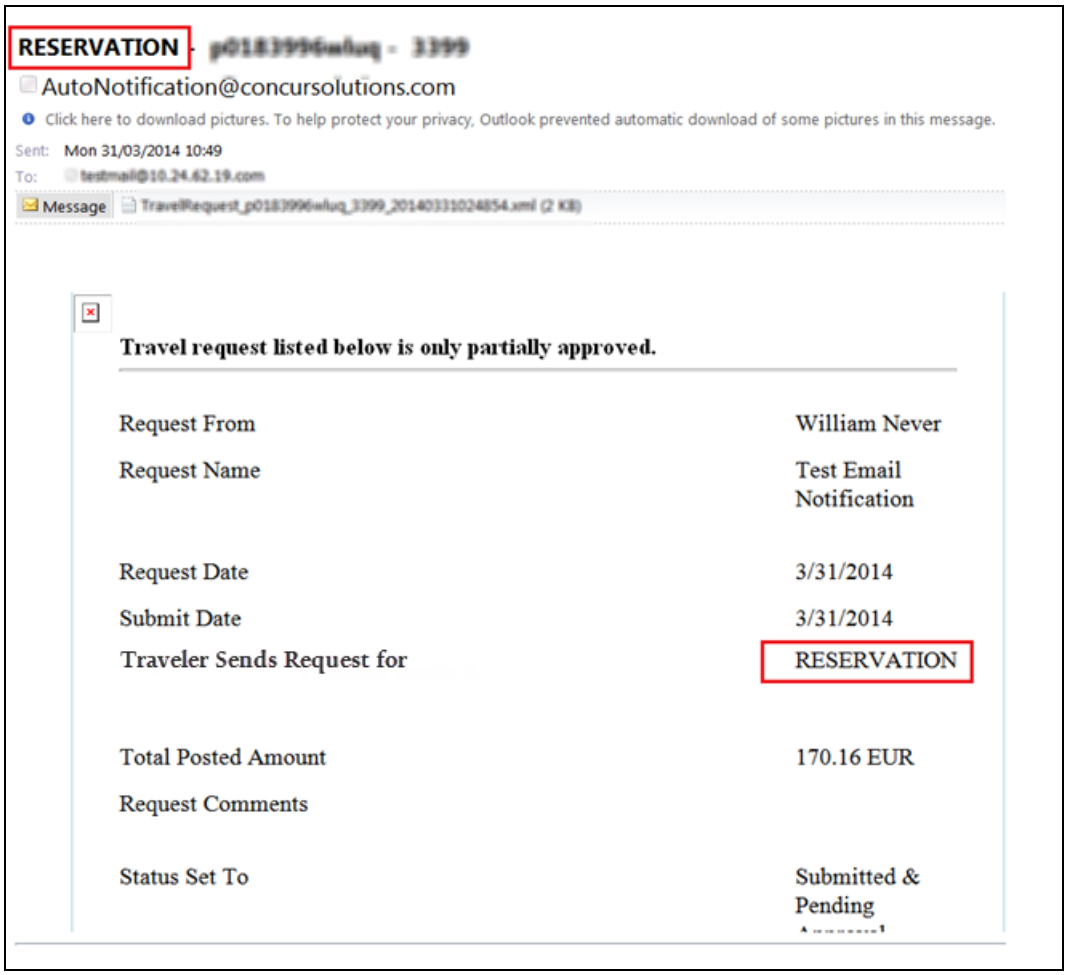
RESERVATION / MODIFICATION

The %ChangeType% email object variable provides the text *Reservation* in the initial email and *Modification* on subsequent emails to the agency.



NOTE: Consider adding the new variable in the subject ***and*** in the email body.

Sample of initial email:



RESERVATION - [illegible]

AutoNotification@concursolutions.com

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Mon 31/03/2014 10:49

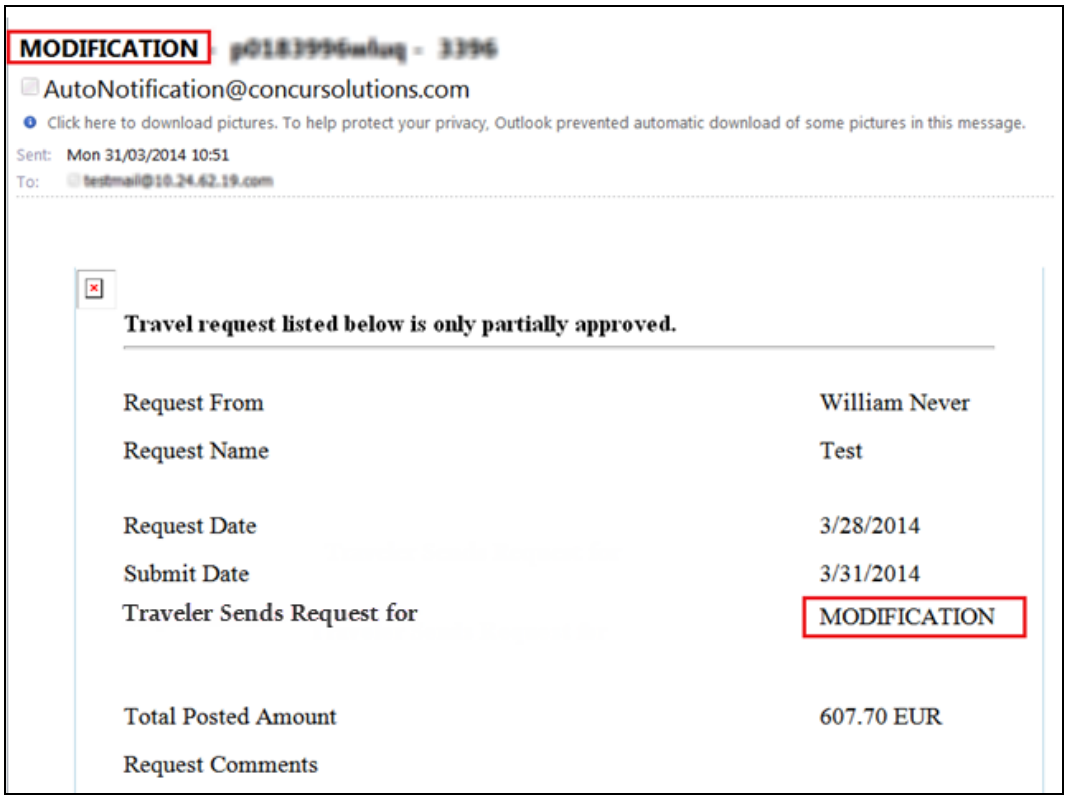
To: [illegible]

Message [illegible]

Travel request listed below is only partially approved.

Request From	William Never
Request Name	Test Email Notification
Request Date	3/31/2014
Submit Date	3/31/2014
Traveler Sends Request for	RESERVATION
Total Posted Amount	170.16 EUR
Request Comments	
Status Set To	Submitted & Pending

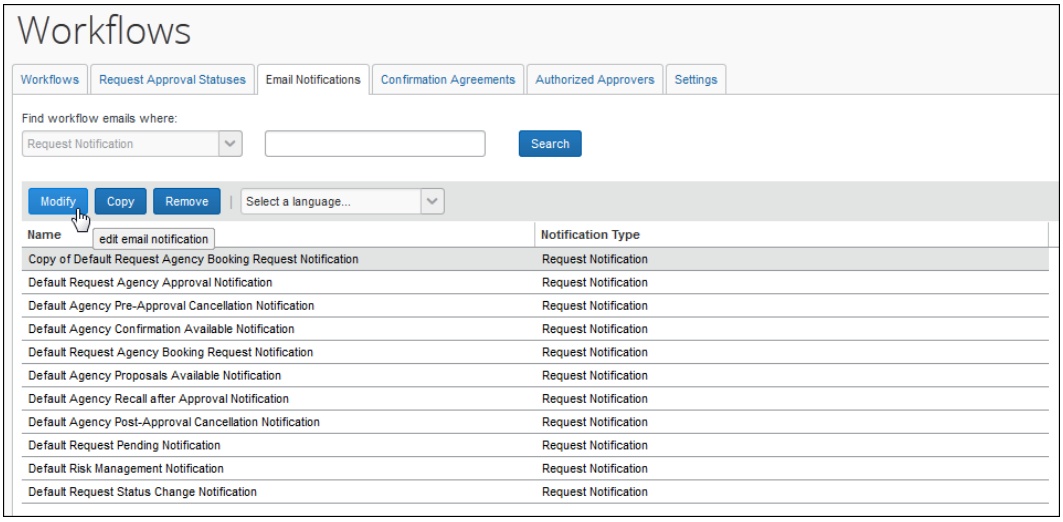
Sample of modification email:



Modifying an Email Notification

- ***To modify an email notification:***

1. On the **Email Notifications** tab, click the desired notification.



NOTE: The *Default Agency Confirmation Available Notification* and the *Default Agency Proposal Available Notification* appear in this list. They are used with the Agency Proposals feature; refer to the *Concur Request: Agency Proposals Setup Guide.*

2. Click **Modify**. The 1 **General** step of the **Modify Email Notification** wizard appears.

3. Make the desired changes.

Field	Description
Modifying Language	Select the language you would like to update. This option allows you to edit the email contents for a specific installed language via the user interface.
Email Notification Name	Edit the name of the email notification. This name will appear in the email notification list while editing the workflow.
Notification Type	(read-only)
Overwrite all Languages	Either: • Click *Yes* to apply the new text to all languages. • Click *No* to make changes only for the selected language. **Tip:** If creating a new email or making major changes to an existing one, it may be more efficient to overwrite the other languages with the new edits, then go into each language and edit the text portion of the email to the correct language.

4. Click **Next** to navigate through the pages.

   Refer to *Adding an Email Notification* of this guide for field details.

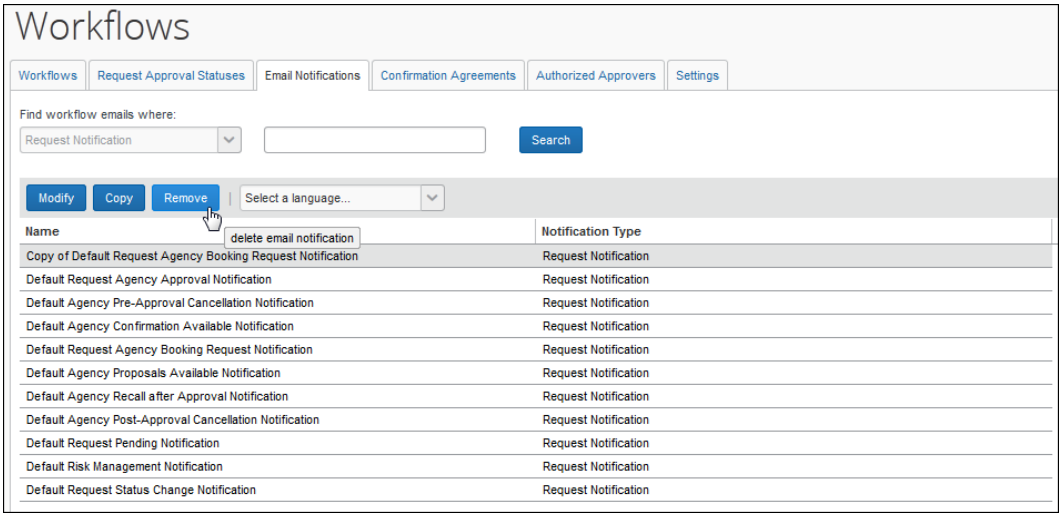
5. When done, click **Done**.

Removing an Email Notification

You can remove email notifications that are no longer needed and are not in use. Default emails provided by the system cannot be removed.

To remove an email notification:

1. On the **Email Notifications** tab, click the desired notification.



NOTE: The *Default Agency Confirmation Available Notification* and the *Default Agency Proposal Available Notification* appear in this list. They are used with the Agency Proposals feature; refer to the *Concur Request: Agency Proposals Setup Guide.*

2. Click **Remove**. The email notification is deleted.

Section 16: Confirmation Agreements

Overview

Many companies require a legally binding acceptance statement from their employees where finances are used to procure a good or service for company use. Confirmation agreements allow a company to do this electronically, using a customizable message box that displays when the user submits a request or an approver approves a request.

When the terms of the agreement statement are accepted by a user or approver, an audit trail entry with this information is created to satisfy these legal requirements.

How It Works

When a user or approver is working under a request policy where the workflow specifies the use of confirmation agreements, the system displays that agreement in the body of the **Final Review/Confirmation** message boxes that appear on submit and approval actions.

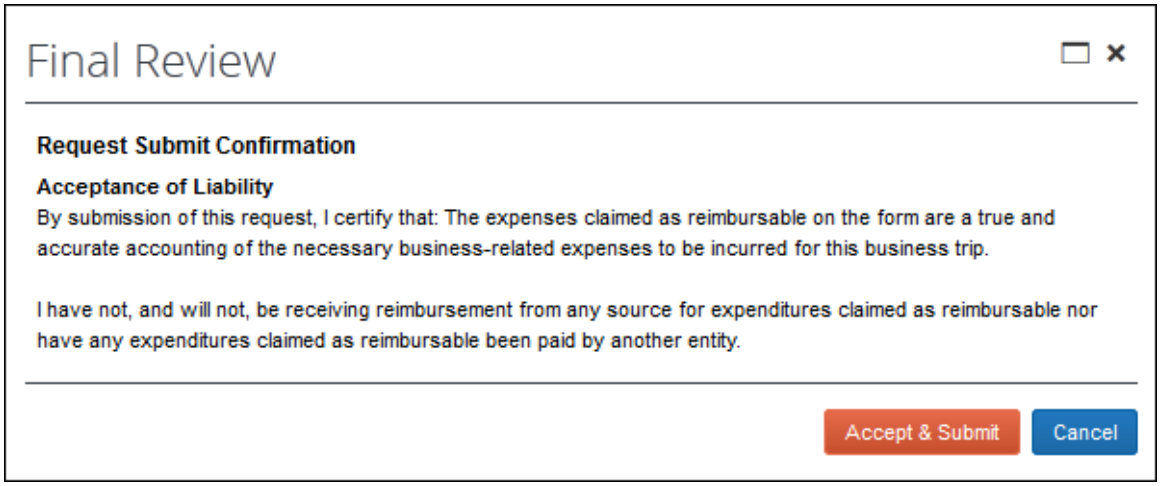
When configuring confirmation agreements, the administrator associates the agreement they create with policies to implement the display of the agreement.

End-User Experience

Request Submit

When the user clicks **Submit Request**, the **Final Review** message box appears.

NOTE: Though this text is designed for expense reports, you can create similar text for requests.

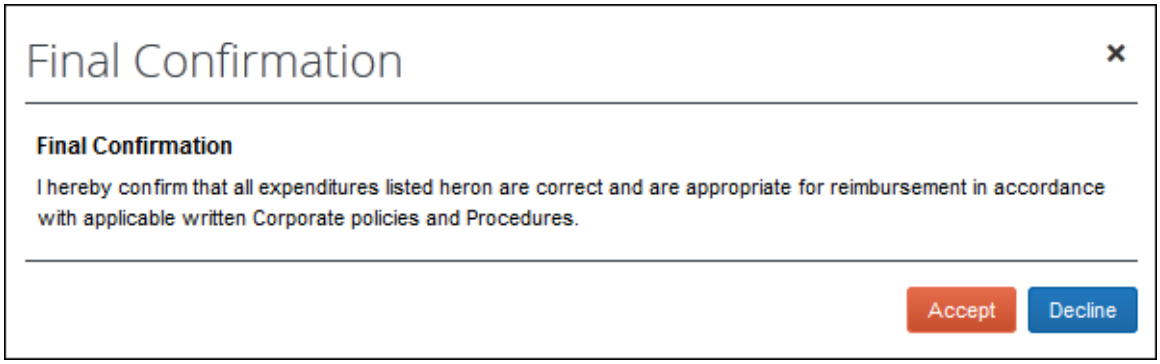


The user clicks **Accept & Submit**.

NOTE: Clicking **Cancel** prevents the request from being submitted and returns the user to the request page.

Request Approval

The approver clicks **Approve**. The **Final Confirmation** message box appears. It may look much like the figure shown below.



The approver clicks **Accept**.

NOTE: Clicking **Decline** prevents the request from being approved and returns the approver to the request.

Configuration

Accessing the Confirmation Agreement Tab

To access the Confirmation Agreement tab:

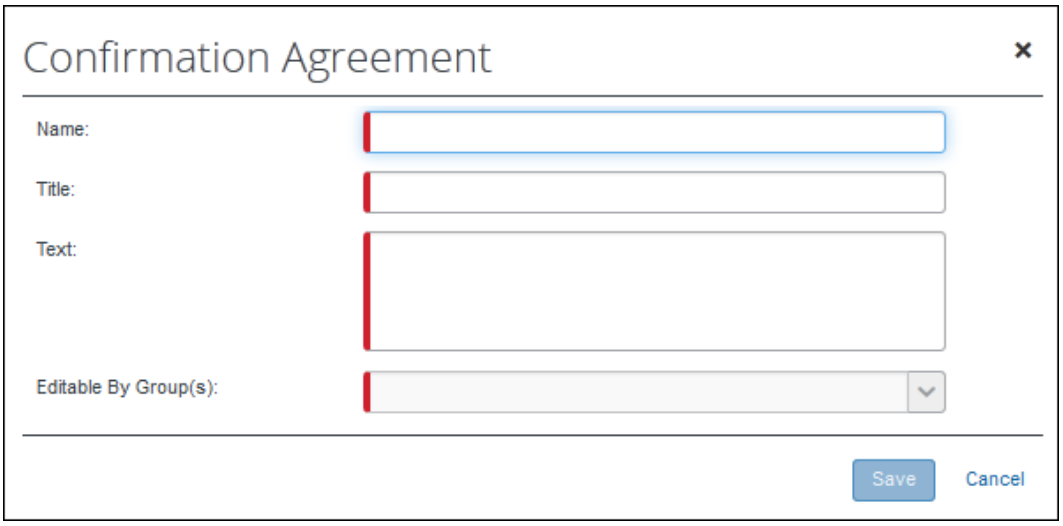
1. Click **Administration** > **Request**.
2. Click **Workflows** (left menu).
3. Click the **Confirmation Agreements** tab.

Creating a Confirmation Agreement

To create a confirmation agreement:

1. On the **Confirmation Agreement** tab, click **New**.

The **Confirmation Agreement** window appears.



2. Complete the appropriate fields.

Field Name	Description
Name	Enter a unique name. This name is used internally in the request workflow. It is not seen by the user or approver.
Title	Enter the title. The text that is typed here appears in bolded text (no HTML tagging is required) and appears at the top of the message body area, directly below the title bar.

Field Name	Description
Text	Enter the text of the agreement. This text is displayed in the body of the message box and constitutes the legal disclaimer or acceptance you want the user or approver to view. You may type up to 2000 characters. The following HTML tags may be used to enhance the message: <B> Bold <BIG> Big Text Line Break <CENTER> Center <I> Italic <SMALL> Small Text <STRIKE> Strikethrough <u> Underline
Editable by Group(s)	Click the group or groups that can edit the agreement.

3. Click **Save**. The agreement is now available for association with workflow.

Associating Agreements with Requests

Confirmation agreements are associated with requests using request workflows and request policies – the agreement is first included in *workflow*, then the workflow is associated with a *policy*.

To associate a confirmation agreement with request workflow:

As described in *Workflow Configuration – Creating* in this guide:

- In the **Submit Confirmation Agreement** list, choose the agreement to be displayed when submitting a request.
- In the **Approval Confirmation Agreement** list, choose the agreement to be displayed when approving a request.

The workflow containing the desired confirmation agreement(s) is now available when you create or edit a request policy.

Modifying a Confirmation Agreement

Changes made to a confirmation agreement are immediately visible to the submitting user and the approver on approval action.

To modify a confirmation agreement:

1. On the **Confirmation Agreement** tab:
   - Select the desired agreement and click **Modify**.
     – or –
   - Double-click the desired agreement.
2. Edit the agreement as required.

   For detailed field information, refer to *Creating a Confirmation Agreement*.
3. Click **OK**.

Removing a Confirmation Agreement

To remove a confirmation agreement:

1. On the **Confirmation Agreement** tab, click the desired confirmation agreement.
2. Click **Remove**.

Section 17: Workflow Settings

Overview

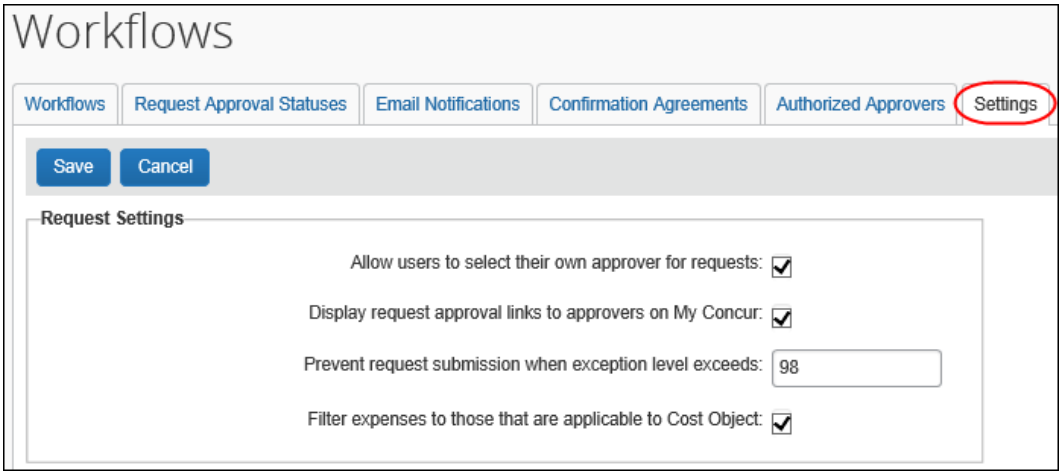
Workflow settings define the general request workflow actions. All request workflow settings are global. They apply to all request workflows and all employees – regardless of group.

Configuration

Accessing the Settings Tab

To access the page:

1. Click **Administration** > **Request**.
2. Click **Workflows** (left menu).
3. Click the **Settings** tab.



Modifying Workflow Settings

To change options:

1. Select an option or complete the field as described in the table below.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Allow users to select their own approver for requests</td><td>If this check box is selected (enabled) and:
<table>
<tr><th>"Prompt" setting in user profile is:</th><th>Default approver is:</th><th>Then....</th></tr>
<tr><td>Selected (On)</td><td>Identified</td><td>The user is prompted; the default approver names appears but can be changed.</td></tr>
<tr><td>Selected (On)</td><td>Not identified</td><td>The user must select an approver.</td></tr>
<tr><td>Cleared (Off)</td><td>Identified</td><td>The user is not prompted; the request is submitted.</td></tr>
<tr><td>Cleared (Off)</td><td>Not identified</td><td>The user must select an approver.</td></tr>
</table>
If this check box is not selected (enabled), then the user cannot choose an approver. If the user attempts to submit a request and there is no approver already assigned, the user is presented a message to notify an administrator.</td></tr>
<tr><td>Display request approval links to approvers on My Concur</td><td>If selected (enabled), the Approve link appears on the Approvals page. This allows the approver to quickly approve requests.
If not selected (disabled), then the approver must open the request and approve it.</td></tr>
<tr><td>Prevent request submission when exception level exceeds X</td><td>Type a number from one to 99.
Any request that meets the criteria for an exception with this level or above prevents the employee from submitting the request. The employee must then make the necessary changes before being able to submit the request.
An exception message is presented to the user.</td></tr>
</table>

Setting	Description
Filter expenses to those that are applicable to Cost Object	This option applies only if you are using cost object approvals. If selected (enabled), the cost objects that appear apply only to that cost object approver. If not selected (disabled), all cost objects appear to all cost object approvers. **NOTE:** This setting is not designed to fully hide the other cost object information. It simply filters it out of the display, making it easier for a cost object approver to focus on the items that apply to them. In fact, if the cost object approver wants to see the entire request, the approver can use the print feature to see the printed report, which displays all of the detail.

2. Click **Save**.