Concur Request: Workflow – General Information

Setup Guide

Last Revised: August 12, 2020

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
</table>
| 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.                               |
| 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.  
<p>|                  |     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 &gt; Configuration &gt; Available Data Variables section to include the new Notification value. |
| January 18, 2019 | Changed copyright and added a note about the Can Book Travel check box to the Integrated with Travel Configuration &gt; Restrict Access to Travel Tab Configuration section. |</p>
<table>
<thead>
<tr>
<th>Date</th>
<th>Notes / Comments / Changes</th>
</tr>
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<tbody>
<tr>
<td>October 4, 2018</td>
<td>Added the Integrated with Travel Configuration &gt; 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.</td>
</tr>
<tr>
<td>July 26, 2018</td>
<td>Updated the Integrated with Travel &gt; What the User Sees – Approve then Book Process section.</td>
</tr>
<tr>
<td>July 18, 2018</td>
<td>Added reference the Concur Travel: Approvals, Rules, and Classes/Policies Travel Service Guide guide in Section 18: Integrated with Travel Configuration.</td>
</tr>
<tr>
<td>April 12, 2018</td>
<td>Changed the check boxes on the front cover; no other changes; cover date not updated.</td>
</tr>
<tr>
<td>February 8 2018</td>
<td>Changed copyright and updated guide name in reference to the Shared: Employee Import Specification guide.</td>
</tr>
<tr>
<td>September 16 2017</td>
<td>Updated the Email Notifications &gt; Overview section.</td>
</tr>
<tr>
<td>May 31 2017</td>
<td>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.</td>
</tr>
<tr>
<td>March 23 2017</td>
<td>Updated the Passive Approval and Creating a Workflow &gt; Using the General Page sections.</td>
</tr>
<tr>
<td>February 23 2017</td>
<td>Updated the Passive Approval and What the User Sees – Approve then Book Process sections.</td>
</tr>
<tr>
<td>January 20 2017</td>
<td>Updated the Notification to Approver When Booked Amount is Greater than Approved Amount section.</td>
</tr>
<tr>
<td>January 12 2017</td>
<td>Updated the Post Approval Trip Update section.</td>
</tr>
<tr>
<td>January 10 2017</td>
<td>Updated the definition of the Approval Time Expired Action.</td>
</tr>
<tr>
<td>December 21 2016</td>
<td>Added a note to the Integrated with Travel Configuration &gt; Basic Configuration section.</td>
</tr>
<tr>
<td>December 14 2016</td>
<td>Changed copyright and cover; no other content changes.</td>
</tr>
<tr>
<td>December 9 2016</td>
<td>Updated the Passive Approval and Post Approval Trip Update sections, and the Workflow Rule Actions &gt; Change Approver definition.</td>
</tr>
<tr>
<td>November 30 2016</td>
<td>Updated the Available Data Variables section to add the CWT &quot;Clipper&quot; Agency Proposal data variable, and information about adding the Travel Details section to the approval email.</td>
</tr>
<tr>
<td>October 26 2016</td>
<td>Updated the Post-Approval Trip Updates section.</td>
</tr>
<tr>
<td>October 20 2016</td>
<td>Updated the Permissions section and guide content to new corporate style; no content changes.</td>
</tr>
<tr>
<td>September 9 2016</td>
<td>Added two new sections to Integrated with Travel Configuration: Passive Approval and Post-Approval Trip Updates.</td>
</tr>
<tr>
<td>June 17 2016</td>
<td>Updated note in What the User Sees – Approve then Book Process section.</td>
</tr>
<tr>
<td>June 10 2016</td>
<td>Added a warning to the Configuring Pre-Approval Conditions section.</td>
</tr>
<tr>
<td>May 25 2016</td>
<td>Updated the Notification to Approver When Booked Amount is Greater than Approved Amount section.</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>May 16 2016</td>
<td>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.</td>
</tr>
<tr>
<td>May 3 2016</td>
<td>Updated the Restrict Access to Travel Tab Configuration section.</td>
</tr>
<tr>
<td>April 15 2016</td>
<td>Added new Approved Amount Before Booking data variable, and updated the Notification to Approver when Booked Amount is Greater than Approved Amount section.</td>
</tr>
<tr>
<td>March 18 2016</td>
<td>Added new section Restrict Access to Travel Tab Configuration.</td>
</tr>
<tr>
<td>February 26 2016</td>
<td>Added new section Offline PNR Retrieval Configuration.</td>
</tr>
<tr>
<td>February 22 2016</td>
<td>Updated the User Comment Data Variable.</td>
</tr>
<tr>
<td>February 19 2016</td>
<td>Added warning note to Notification to Approver When Booked Amount is Greater than Approved Amount feature information- this feature should not be used yet.</td>
</tr>
<tr>
<td>January 15 2016</td>
<td>Updated information about Approval Time Expired settings.</td>
</tr>
<tr>
<td>September 18 2015</td>
<td>Added the Integrated with Travel Configuration &gt; Agency Booking Configuration section.</td>
</tr>
<tr>
<td>April 10 2015</td>
<td>Updated the What the User Sees – Starting in Request Process section.</td>
</tr>
<tr>
<td>March 13 2015</td>
<td>Updated Integrated with Travel Configuration section.</td>
</tr>
<tr>
<td>January 16 2015</td>
<td>Updated the screen shots to the enhanced UI and updated Integrated with Travel Configuration section.</td>
</tr>
<tr>
<td>December 22 2015</td>
<td>Added new User Comment variable for workflow email notifications.</td>
</tr>
<tr>
<td>November 30 2014</td>
<td>Integration Administrator has changed to Import/Extract Administrator; no other content changes.</td>
</tr>
<tr>
<td>November 14 2014</td>
<td>Updated Configuration to change Request Administrator to Request Configuration Administrator where necessary.</td>
</tr>
<tr>
<td>September 19 2014</td>
<td>Added information about two user interfaces; no other content changes.</td>
</tr>
<tr>
<td>October 17 2014</td>
<td>Added information about workflow step TMC Agent role.</td>
</tr>
</tbody>
</table>
| August 22 2014    | Added new Integrated with Travel section. Also added: For rules:  
|                   | • Data object – Request – added:  
|                   |    • Ignore Booking Policy  

Concur Request: Workflow - General Information Setup Guide  
Last Revised: August 12, 2020  
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<table>
<thead>
<tr>
<th>Date</th>
<th>Notes / Comments / Changes</th>
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<tbody>
<tr>
<td>July 11 2014</td>
<td>For rules:</td>
</tr>
<tr>
<td></td>
<td>• Data object – Segment – added:</td>
</tr>
<tr>
<td></td>
<td>♦ Class</td>
</tr>
<tr>
<td>April 22 2014</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Prevent Approval After the Approval Time Limit</td>
</tr>
<tr>
<td></td>
<td>• %ChangeType% email reminder option</td>
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<tr>
<td>February 11 2014</td>
<td>Removed references that Agency Proposals is available only in France; it is now available worldwide</td>
</tr>
<tr>
<td>January 17 2014</td>
<td>Added information about default Approver 2</td>
</tr>
<tr>
<td>October 28 2013</td>
<td>Added:</td>
</tr>
<tr>
<td></td>
<td>• For rules:</td>
</tr>
<tr>
<td></td>
<td>♦ Data object – Segment – added:</td>
</tr>
<tr>
<td></td>
<td>◦ Booking origin</td>
</tr>
<tr>
<td></td>
<td>♦ Data object – Request – now available:</td>
</tr>
<tr>
<td></td>
<td>◦ Highest Location Risk Level</td>
</tr>
<tr>
<td></td>
<td>◦ Main Destination Risk Level</td>
</tr>
<tr>
<td></td>
<td>♦ Data object - Request Entry - now available:</td>
</tr>
<tr>
<td></td>
<td>◦ Location Risk Level</td>
</tr>
<tr>
<td></td>
<td>♦ Data object - Segment - now available:</td>
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<tr>
<td></td>
<td>◦ From Location Risk Level</td>
</tr>
<tr>
<td></td>
<td>◦ To Location Risk Level</td>
</tr>
<tr>
<td></td>
<td>• In workflow steps, the Role list contains Risk Manager if Risk Management has been enabled.</td>
</tr>
<tr>
<td></td>
<td>• For email reminders, added a note about default reminders for Risk Management.</td>
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<td>July 19 2013</td>
<td>Added to the Request Entry Attendee data object:</td>
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<td>• Middle Initial</td>
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<td></td>
<td>• Suffix</td>
</tr>
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<td></td>
<td>• Custom 21 to 25</td>
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<tr>
<td>July 1 2013</td>
<td>Added to email notifications:</td>
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<td></td>
<td>• Main Destination</td>
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<td></td>
<td>• Highest Country Risk Level (not yet available)</td>
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<td></td>
<td>• Approval Limit Date</td>
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<td>• Total Remaining Amount</td>
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<td>June 14 2013</td>
<td>Added information about:</td>
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<td></td>
<td>• Expiration Email to Approver field</td>
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<td></td>
<td>• New email options for workflow step rules</td>
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<tr>
<td>May 17 2013</td>
<td>Added information about Request data object:</td>
</tr>
<tr>
<td></td>
<td>• Has Event Request</td>
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<td></td>
<td>• Has Offline Agency Segments</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
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<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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<tr>
<td>April 26 2013</td>
<td>Added information about:</td>
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<td></td>
<td>• Amount-Daily Limit for Request Cash Advance</td>
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<td>March 28 2013</td>
<td>Data object - Request:</td>
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<td></td>
<td>• Changed: Request Type Code to Request Type</td>
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<td></td>
<td>• Added:</td>
</tr>
<tr>
<td></td>
<td>• Created By Delegate</td>
</tr>
<tr>
<td></td>
<td>• Highest Location Risk Level (used with Risk Management; not yet available)</td>
</tr>
<tr>
<td></td>
<td>• Main Destination Risk Level (used with Risk Management; not yet available)</td>
</tr>
<tr>
<td></td>
<td>Data object - Request Entry - added:</td>
</tr>
<tr>
<td></td>
<td>• Location Risk Level (used with Risk Management; not yet available)</td>
</tr>
<tr>
<td></td>
<td>Data object - Segment - added:</td>
</tr>
<tr>
<td></td>
<td>• From Location Risk Level (used with Risk Management; not yet available)</td>
</tr>
<tr>
<td></td>
<td>• To Location Risk Level (used with Risk Management; not yet available)</td>
</tr>
<tr>
<td>March 4 2013</td>
<td>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)</td>
</tr>
<tr>
<td>February 22 2013</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Name change from &quot;Travel Request&quot; to &quot;Request&quot;</td>
</tr>
<tr>
<td></td>
<td>• The Request Type Code field to workflow rules</td>
</tr>
<tr>
<td></td>
<td>• The Filter expenses to those that are applicable to Cost Object option</td>
</tr>
<tr>
<td>January 18 2013</td>
<td>Clarified that &quot;days&quot; in the Expire After This Many Days field are 24-hour periods from the time the travel request is submitted</td>
</tr>
<tr>
<td></td>
<td>Added information about these Request data object options:</td>
</tr>
<tr>
<td></td>
<td>• Main Destination City</td>
</tr>
<tr>
<td></td>
<td>• Main Destination Country</td>
</tr>
<tr>
<td>January 4 2013</td>
<td>Clarified that &quot;days&quot; in the Expire After This Many Days field are calendar days - not business days</td>
</tr>
<tr>
<td>December 28 2012</td>
<td>Made rebranding and/or copyright changes; no content changes</td>
</tr>
<tr>
<td>November 20 2012</td>
<td>Added information about the objects used for cash Advance Limits</td>
</tr>
<tr>
<td>October 19 2012</td>
<td>Added information about additional fields/values for rules and the setting for cost object approval</td>
</tr>
<tr>
<td>July 13 2012</td>
<td>Added information about the Duration (Days) field</td>
</tr>
<tr>
<td>June 22 2012</td>
<td>Added information about the Policy Compliant field</td>
</tr>
<tr>
<td>May 18 2012</td>
<td>Added information about attendee rules and vendor rules</td>
</tr>
<tr>
<td>April 20 2012</td>
<td>Added information about %ATTACHMENT%</td>
</tr>
<tr>
<td>March 6 2012</td>
<td>Made rebranding and/or copyright changes; no content changes</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>January 20 2012</td>
<td>Added information about recall after approval</td>
</tr>
<tr>
<td>December 19 2011</td>
<td>Added the options for all of the condition editor data objects</td>
</tr>
<tr>
<td>November 22 2011</td>
<td>Added information about Processor</td>
</tr>
<tr>
<td>October 21 2011</td>
<td>Added additional data objects</td>
</tr>
<tr>
<td>September 23 2011</td>
<td>Added information about the two cancellation emails</td>
</tr>
<tr>
<td>July 22 2011</td>
<td>User interface changes - &quot;Request&quot; changed to &quot;Travel Request&quot; - updated menu options and screen shots</td>
</tr>
<tr>
<td>June 21 2011</td>
<td>New Printed Reports screen shot</td>
</tr>
<tr>
<td>June 3 2011</td>
<td>Changed occurrences of &quot;Request&quot; to &quot;Travel Request&quot; - no other changes to content</td>
</tr>
<tr>
<td>May 31 2011</td>
<td>Added information about authorized approvers and the Travel Request: Workflow - Authorized Approval Setup Guide</td>
</tr>
<tr>
<td>March 18 2011</td>
<td>Added information about:</td>
</tr>
<tr>
<td></td>
<td>• Workflows moved to the <em>current</em> user interface</td>
</tr>
<tr>
<td></td>
<td>• Email Notifications moved to the Workflow tool</td>
</tr>
<tr>
<td>January 21 2011</td>
<td>Changes:</td>
</tr>
<tr>
<td></td>
<td>• Update to match current feature set</td>
</tr>
<tr>
<td></td>
<td>• Updated the copyright and made rebranding changes</td>
</tr>
<tr>
<td>October 15 2010</td>
<td>Initial publication</td>
</tr>
</tbody>
</table>
Workflow – General Information

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. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview of the Request Feature

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: Request Configurations

Not all Request features are available for all Request configurations.

<table>
<thead>
<tr>
<th>Configuration</th>
<th>Is this feature available?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stand-alone</td>
<td>Yes, Required</td>
</tr>
<tr>
<td>Integrated with Concur Expense (but not Concur Travel)</td>
<td>Yes, Required</td>
</tr>
<tr>
<td>Integrated with Concur Travel (but not Concur Expense)</td>
<td>Yes, Required</td>
</tr>
<tr>
<td>Integrated with Concur Expense and Concur Travel</td>
<td>Yes, Required</td>
</tr>
</tbody>
</table>

Section 4: Workflow Guides

Refer to these guides when configuring and maintaining workflows.

<table>
<thead>
<tr>
<th>Setup Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concur Request: Workflow - General Information</td>
<td>Read this guide for general information about request workflows.</td>
</tr>
<tr>
<td>Concur Request: Workflow - Authorized Approval</td>
<td>Read this guide if the company uses authorized approvers but only after reading the Concur Request: Workflow - General Information Setup Guide.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow</td>
<td>A workflow defines how a request is routed for approval through the system after it is submitted by the user.</td>
</tr>
<tr>
<td>Workflow rule</td>
<td>A set of criteria that, when met, activates a request workflow step&lt;br&gt;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.&lt;br&gt;• If true, the system performs the action defined by the rule.&lt;br&gt;• If false, the system does not perform the action.</td>
</tr>
<tr>
<td>Role</td>
<td>A mechanism that identifies the person responsible for moving the request to the next step&lt;br&gt;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.</td>
</tr>
<tr>
<td>Approver</td>
<td>Approver is a general term that identifies any employee who has the authority to approve requests.</td>
</tr>
</tbody>
</table>
Section 5: Overview of Workflows - General

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Approver</td>
<td>Budget approvers approves invoice and purchase request transactions.</td>
</tr>
<tr>
<td></td>
<td>For more information, refer to the Shared: Budget Setup Guide.</td>
</tr>
<tr>
<td>Default Approver</td>
<td>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.</td>
</tr>
<tr>
<td>Default Approver 2</td>
<td>The default approver can be set by the User Admin, via the employee import, or – depending on configuration – by the employee in Profile &gt; Profile Settings &gt; Request Approvers.</td>
</tr>
<tr>
<td></td>
<td>NOTE: Whether an employee can select their own approver – while submitting or in Profile – is configurable.</td>
</tr>
<tr>
<td></td>
<td><strong>Second default approver:</strong></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

**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:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Submitted</td>
<td>The employee submits the request.</td>
</tr>
<tr>
<td>Manager Approval</td>
<td>The request approver approves the request.</td>
</tr>
</tbody>
</table>

**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 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 Concur moves the request along to the next step automatically without human interaction.

The default request workflow contains the following steps:

<table>
<thead>
<tr>
<th>Step Order</th>
<th>Step Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Request Submitted</td>
<td>System</td>
</tr>
<tr>
<td>2</td>
<td>Manager Approval</td>
<td>Request Approver</td>
</tr>
<tr>
<td>3</td>
<td>Request Approved</td>
<td>System</td>
</tr>
</tbody>
</table>

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, Concur 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 Concur 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 **Workflow Procedures - Creating**), then Concur 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, has been skipped, or was delegate approved.

• 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 immediately takes the company’s time-out action. Meaning, Concur handles the request as shown in the Approval Time Expired Action list.

![Approval Time Expired Action](image)

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: What the User Sees**

**Approval Flow Tab**

As part of the company configuration, the company can allow its 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.

![Approve & Forward Example](image)

Refer to **Workflow Procedure: Creating** 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 Travel**

**Request to Travel Process Flow**

Clients who have Request integrated with Travel have the option of using one of these two process flows:

1. **Approve then Book (Request to Travel)**: The user starts their process by creating a request. Once the request is approved, the user sees a link to book their travel segments in Travel, or the request information is sent to a travel agent to book. This process is configured using Workflow, Policies, and optionally Forms and Fields.

   For more information, refer to the *Integrated with Travel Configuration* section of this guide.

2. **Book then Approve (Travel to Request)**: The user starts their process by booking a trip in Travel. Depending on configuration, the system creates a request for the trip. Once the request is approved, the reservation is running automatically through the finishing process in the background. For reservations with a GDS (global distribution system) flight segment, this
means that the flight is only released for ticketing and payment processing after approval. This process is configured in Travel.

For more information about these two process flows, refer to the Concur Request: Overview Guide.

What the User Sees – Approve then Book Process

If the company has enabled the Approve then Book process flow in Workflow, the request will have the Approved – Pending Booking workflow step after the approval steps. Once the request is in this status, the user sees the Book link in the Action column on the Manage Requests page.

Or the Book with Concur Travel button on the request page.
The user clicks **Book/Book with Concur Travel**, and is taken to the **Travel Request Itinerary** page.

**NOTE:** The user must click **Book/Book with Concur Travel** to book the segments specified in the itinerary. If the users navigate to the Travel tab to book the trip, it will not be connected to the request. The system can be configured to prevent the users from viewing the Travel tab, preventing this issue. Users should only be configured this way if they do not need access to the Travel tab for any other reason, such as to use the Concur Travel multipax or guest traveler features. For more information, refer to the *Integrated with Travel Configuration* section in this guide.

**NOTE:** The **Booking Switch** does not apply on the booking step, and the whole trip must be booked in Concur Travel when the request is approved.

A small box summarizes the Request main information on the left side. The itinerary segment information is listed on the page. If the user has no required fields to complete, they click **Proceed to booking**.

**NOTE:** It is recommended to train users on the importance of finishing every trip booking in Travel all the way through the workflow. If the user books a trip from the approved request but does not finish the booking, the trip will end up in an “unfinished” state, and the user will receive emails informing them to finish the trip to avoid auto-cancellation.

When finishing an unfinished trip, the link between the request and the booking is lost and a new request is created.
If the user does have required fields to fill in, the fields will be highlighted on the **Travel Request Itinerary** page:

The user completes the fields and clicks **Proceed to Booking**. The Travel search results page appears.
The user is taken through the booking process, picking up the services initially defined in the Request, one after the other.

**NOTE:** The Approve then Book process does not support user selection of a higher cabin class than Economy in a Flex Faring context. Users who book from the approved request will only be able to book the lowest service class (Economy).

Once done, the user confirms their whole booking, which is marked as Approved.

**NOTE:** Users that do not have access to the Travel tab can still complete the travel wizard if they access it from the request Book/Book in Concur Travel link/button.

At this stage, the itinerary updates the request and automatically completes the Approved – Pending Booking step. The request moves to the next workflow step, if any.

When using the Approve then Book process flow in Workflow, sometimes an itinerary being requested cannot be booked in Concur Travel, either because the itinerary is outside of Concur Travel functionality (for example, the itinerary contains more than six segments) or the request was created with dates in the past. If the itinerary
cannot be booked in Concur Travel, a system message like the following will be generated:

![Warning message]

For more information about how to handle this scenario, refer to the Integrated with Travel Configuration > Handling Requests That Can’t be Booked in Travel section of this guide.

Section 8: Overview - Workflow Configuration

Workflow Design

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

<table>
<thead>
<tr>
<th>General concept</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Centralized approval workflow</strong></td>
<td>With this type of request workflow, the employee can view the name of their default approver but cannot select a different approver.</td>
</tr>
<tr>
<td></td>
<td>In this case, when the employee submits a request, it is automatically routed to the default approver.</td>
</tr>
<tr>
<td><strong>Decentralized workflow</strong></td>
<td>Where the employee selects their approver:</td>
</tr>
<tr>
<td><strong>or Employee-directed Approval</strong></td>
<td>• The employee selects from a list of approvers.</td>
</tr>
<tr>
<td></td>
<td>• The employee might be assigned a default approver but the employee can select a different approver if desired.</td>
</tr>
<tr>
<td></td>
<td>• The employee can change the workflow steps and add additional steps using the Approvals Flow tab.</td>
</tr>
<tr>
<td><strong>Approver-directed approval</strong></td>
<td>Similar to the decentralized workflow, the approver – but not the employee – can route the employee’s request to another approver.</td>
</tr>
<tr>
<td><strong>Approval time expired</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Data Object</th>
<th>Field/Value</th>
<th>Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request</td>
<td>Total Approved Amount</td>
<td>ANY, Greater</td>
</tr>
<tr>
<td>Value</td>
<td>5,000.00 USD</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A: Left Parenthesis</td>
<td>Select zero to three parentheses, depending on the complexity of the condition.</td>
</tr>
<tr>
<td>B: Data Object</td>
<td>Not all data objects are supported in Request.</td>
</tr>
</tbody>
</table>

⚠️ 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* )
- Employee
- Request
- Request Allocation
- Request Cash Advance
- Request Entry
- Request Entry Attendee
- Request Exception
- Segment

The **unsupported** options that appear are:

- AR (Authorization Request)
  - AR Category
  - AR Category Attendee
  - AR Related Reports
  - Authorization Request Exception
- Company Card
- Entry
  - Entry Allocation
  - Entry Attendee
  - Entry Car
  - Report
  - Report 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. |
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>D: Operator</td>
<td>Click an item in the helper pane. The information that appears in this pane is based upon previous choices.</td>
</tr>
<tr>
<td>E: Data Object</td>
<td>The system provides the option that best suits the previous choices. Change it if necessary.</td>
</tr>
<tr>
<td>F: Field / Value</td>
<td>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.</td>
</tr>
<tr>
<td>G: Right Parenthesis</td>
<td>Select zero to three parentheses, depending on the complexity of the condition.</td>
</tr>
<tr>
<td>H: And / Or</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Agency Proposal Type (Used with the Agency Proposal feature; refer to the Concur Request: Agency Proposals Setup Guide)</td>
</tr>
<tr>
<td>Employee</td>
<td>Cash Advance Balance</td>
</tr>
<tr>
<td></td>
<td>City</td>
</tr>
<tr>
<td></td>
<td>Country of Residence</td>
</tr>
<tr>
<td></td>
<td>Custom 01 - 21</td>
</tr>
<tr>
<td></td>
<td>Email Address</td>
</tr>
<tr>
<td></td>
<td>Employee First Name</td>
</tr>
<tr>
<td></td>
<td>Employee ID</td>
</tr>
<tr>
<td></td>
<td>Employee Last Name</td>
</tr>
<tr>
<td></td>
<td>Expense Audit Required</td>
</tr>
<tr>
<td></td>
<td>Has Default Approver</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Request</td>
<td>Has Event Request (Refer to the Concur Request: Event Requests Setup Guide.)</td>
</tr>
<tr>
<td>Agency Office</td>
<td>Has Exceptions</td>
</tr>
<tr>
<td>Approval Status</td>
<td>Has Expected Expenses</td>
</tr>
<tr>
<td>Approval Time Limit</td>
<td>Has Offline Agency Segments</td>
</tr>
<tr>
<td>Approved Amount Before Booking</td>
<td>Has Segments or Expenses</td>
</tr>
<tr>
<td>Approved by Delegate</td>
<td>Has Self Booked Segments</td>
</tr>
<tr>
<td>Authorized Date</td>
<td>Hierarchy Node Key</td>
</tr>
<tr>
<td>Cash Advance Policy Fixed Limit Amount</td>
<td>(For an example, refer to the Concur Request: Cash Advance Setup Guide.)</td>
</tr>
<tr>
<td>Created By Delegate</td>
<td>Is Closed/Inactivated</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Is Deleted</td>
</tr>
<tr>
<td>Currency</td>
<td>Ignore Booking Policy</td>
</tr>
<tr>
<td>Custom 01 - 20</td>
<td>(Used with Enforce Online/Offline Policy; refer to the Concur Request: Site Settings Setup Guide.)</td>
</tr>
<tr>
<td>Duration (Days)</td>
<td>Limit Approved</td>
</tr>
<tr>
<td></td>
<td>Main Destination City</td>
</tr>
<tr>
<td></td>
<td>Main Destination Country</td>
</tr>
<tr>
<td></td>
<td>Main Destination Risk Level</td>
</tr>
<tr>
<td></td>
<td>(Used with Concur Risk Management; refer to the Concur Request: Risk Management Setup Guide.)</td>
</tr>
<tr>
<td>End Date</td>
<td>Maximum Exception Level</td>
</tr>
<tr>
<td>End Time</td>
<td>Name</td>
</tr>
<tr>
<td>Ever Recalled After Approval</td>
<td>Policy</td>
</tr>
<tr>
<td>Ever Sent Back</td>
<td>Previous Approved Amount</td>
</tr>
<tr>
<td>Exception Approved</td>
<td>Processor Entry Date</td>
</tr>
<tr>
<td>Exception Level Total</td>
<td>Purpose</td>
</tr>
<tr>
<td>Extension of First Approve Date</td>
<td></td>
</tr>
<tr>
<td>First Approve Date</td>
<td>(cont’d next page)</td>
</tr>
<tr>
<td>First Submit Date</td>
<td></td>
</tr>
<tr>
<td>Has Accepted Agency Proposal</td>
<td>(Used with the Agency Proposal feature; refer to the Concur Request: Agency Proposals Setup Guide)</td>
</tr>
<tr>
<td>Has Agency Booked Segments</td>
<td></td>
</tr>
<tr>
<td>Has Attachment</td>
<td></td>
</tr>
<tr>
<td>Has Cash Advance</td>
<td></td>
</tr>
<tr>
<td>Has Comments</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Request (cont’d)</td>
<td>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.)</td>
</tr>
<tr>
<td>Request Allocation</td>
<td>Custom 01 - 20</td>
</tr>
<tr>
<td>Request Cash Advance</td>
<td>Account Code, Amount Requested, Amount-Daily Total (Refer to the Concur Request: Cash Advance Setup Guide.), Cash Advance Name, City</td>
</tr>
<tr>
<td>Request Entry</td>
<td>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</td>
</tr>
<tr>
<td>Request Entry Attendee</td>
<td>Attendee Title, Attendee Type, Company, Custom 1 - 25, External ID</td>
</tr>
<tr>
<td>Request Exception</td>
<td>Exception Code, Exception Level</td>
</tr>
</tbody>
</table>
### 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:

<table>
<thead>
<tr>
<th>Approval Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Approver</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

---

**Field** | **Description**
---|---
Segment | Arrival Date
| Arrival Slot (Used with the Agency Proposal feature; refer to the Concur Request: Agency Proposals Setup Guide) | Has Exceptions
| Arrival Time | Is Agency Booked
| Booking Origin | Is Self Booked
| Class of Service | Passenger Name Record
| Class | Policy Compliant (For more information, refer to the Concur Request: Audit Rules Setup Guide.)
| Custom 01 - 40 | Segment Type
| Departure Date | Service Name (Used with the Agency Proposal feature; refer to the Concur Request: Agency Proposals Setup Guide)
| Departure Slot (Used with the Agency Proposal feature; refer to the Concur Request: Agency Proposals Setup Guide) | To Country
| Departure Time | To Country Group
| From Location Detail | To Location Name
| To Location Detail | To Location Risk Level (Used with Concur Risk Management; refer to the Concur Request: Risk Management Setup Guide.)
| From Country | Vehicle Type
| From Country Group | Vendor
| From Location Name | Vendor Name
| From Location Risk Level (Used with Concur Risk Management; refer to the Concur Request: Risk Management Setup Guide.) |
### Approval Action | Description
--- | ---
Generate Exception | Displays a message to the user 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 of the completed steps in the history of the request for the user to view.

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Name</td>
<td>Name of the workflow</td>
</tr>
<tr>
<td>Workflow Type</td>
<td>Type of workflow</td>
</tr>
<tr>
<td>Steps Can Be Added By</td>
<td>User type who can add steps to the workflow while it is in process</td>
</tr>
<tr>
<td>Editable By</td>
<td>Members of group(s) that can edit this workflow</td>
</tr>
</tbody>
</table>

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.

![General page screenshot](image.png)

3. Complete all required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Type</td>
<td>This field is read-only.</td>
</tr>
<tr>
<td>Workflow Name</td>
<td>Type a new name for the workflow. This name does not have to be unique.</td>
</tr>
<tr>
<td>Include the Budget Approval step</td>
<td>Select (enable) this check box to add the Budget Approval step to the workflow. Refer to the Shared: Budget Setup Guide.</td>
</tr>
</tbody>
</table>
### 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 processor step**
- **Skip this step and go to the next step**

**NOTE:** If the Request reaches the step via a Timeout action, skip 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 of Concur, you may have to submit a case to Concur Client Services for assistance with this task.

### 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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not display the skip steps to the employee</td>
<td>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.</td>
</tr>
<tr>
<td>Only display approvers at or above the current approver's level</td>
<td>These fields appear only if authorized approver is activated. Refer to the Concur Request: Workflow – Authorized Approval Setup Guide.</td>
</tr>
</tbody>
</table>
| 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. |
<p>| 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. |
| Restrict Authorized Approver for | These fields appear only if the authorized approver feature is activated. Refer to the Concur Request: Workflow – Authorized Approval Setup Guide. |
| Restrict approvers to those with limit authority for employee-added steps | |
| Restrict approvers to those with exception authority for employee-added steps | |
| Editable By Group(s) | Select the group rights that an administrator must have in order to modify this workflow. |
| 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. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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. |
| 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. |
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Confirmation Agreement</td>
<td>Click the confirmation agreement that will be displayed when the approver approves the request. Refer to <em>Confirmation Agreements</em> in this guide.</td>
</tr>
<tr>
<td>Approval Request Notification</td>
<td>Click the notification that is to be sent to the approver when the request is submitted by the user. Refer to <em>Email Notifications</em> in this guide.</td>
</tr>
<tr>
<td>Status Change Notification</td>
<td>Click the notification that is to be sent to the submitter when the workflow status of the request changes. Refer to <em>Email Notifications</em> in this guide.</td>
</tr>
<tr>
<td>Sent Back Notification</td>
<td>Click the notification that is to be sent to the submitter when the request is sent back to them. Refer to <em>Email Notifications</em> in this guide.</td>
</tr>
<tr>
<td>Courtesy Email Notification</td>
<td>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 <em>Email Notifications</em> in this guide.</td>
</tr>
</tbody>
</table>

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.

![Add Workflow Step Window](image)

2. Complete all required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step Name</td>
<td>Type any alphanumeric name for the workflow step. This name appears to the employee on the <strong>Approval Flow</strong> tab in Concur Request, so it is important to make this name clear for the employee.</td>
</tr>
</tbody>
</table>
## 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 Request to 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*.
- *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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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  
    - 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. |
| 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. |
| Enter Step Employee        | Select an email notification to send to the employee when the workflow step is entered. |

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### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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. |
| 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.

   ![Step Rules Page](image)

   **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.

   ![Edit Condition Window](image)
Section 10: Workflow Configuration - Creating

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type any alphanumeric name for the workflow rule. The name does not have to be unique.</td>
</tr>
<tr>
<td>Force Evaluation</td>
<td>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.</td>
</tr>
<tr>
<td>Evaluate on Exit Step</td>
<td>Select (enable) to have the rule as the user/approver exits the step.</td>
</tr>
</tbody>
</table>

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).

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Approver</td>
<td>Select an approver. When the criteria for this condition occur, the system routes the request to the approver designated here.</td>
</tr>
<tr>
<td>Generate Exception</td>
<td>Select an exception from the helper pane or create a new one. A message appears to those you designate in the Visibility field.</td>
</tr>
<tr>
<td>Send Back to Employee</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Action Description

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

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.

1. **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 *Workflow Procedures: Creating* in this guide.
   3. Click **Done**.

Modifying and Reordering Workflow Steps

1. **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.
Section 11: Workflow Configuration - Modifying and Deleting

3. Either:
   ♦ Select the desired step and click **Modify**.
      − or −
   ♦ Double-click the desired step.

4. Make the desired changes.
   
   **Note:** For details, refer to *Workflow Procedures: Creating* 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.

   **Note:** For details, refer to *Workflow Procedures: 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.

   **Note:** For details, refer to *Workflow Procedures: 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 Travel to initiate the requested trip. In 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.

![Modify Workflow Step Window](image)

- 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 actually 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: Request Approval Statuses

## Overview

These are the default request approval statuses.

<table>
<thead>
<tr>
<th>Approval Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Time Expired</td>
<td>The request expired in the approval queue.</td>
</tr>
<tr>
<td>Approved</td>
<td>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.</td>
</tr>
<tr>
<td>Approved – Pending Booking</td>
<td>The request has been approved and is ready to be booked in Travel.</td>
</tr>
<tr>
<td></td>
<td>This status only appears for clients who have Request integrated with Travel.</td>
</tr>
<tr>
<td></td>
<td>For more information, refer to the Integrated with Travel section of this guide.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The request was canceled.</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>The request has not been submitted and has not entered a workflow process.</td>
</tr>
<tr>
<td>Pending External Validation</td>
<td>This status is associated with the External Validation feature. For more information about this custom feature, refer to <a href="https://developer.concur.com/api-reference/callouts/event-notification.html">https://developer.concur.com/api-reference/callouts/event-notification.html</a>. Contact SAP Concur support for assistance enabling the feature and configuring the workflow step.</td>
</tr>
<tr>
<td></td>
<td>If you see this status and you are using the External Validation feature, refer to <a href="https://developer.concur.com/api-reference/callouts/get-notifications-status.html">https://developer.concur.com/api-reference/callouts/get-notifications-status.html</a> for more information.</td>
</tr>
<tr>
<td>Sent Back to Employee</td>
<td>The request is sent back to the employee for more information or correction.</td>
</tr>
<tr>
<td>Submitted</td>
<td>An employee has submitted the request.</td>
</tr>
<tr>
<td>Submitted &amp; Pending Approval</td>
<td>The request is somewhere in the approval process, but has not been approved.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Type a name for the new status.</td>
</tr>
<tr>
<td>Action Text</td>
<td>Type the action text. This text appears to the approver.</td>
</tr>
<tr>
<td>Description</td>
<td>Type the description text.</td>
</tr>
<tr>
<td>Editable By Group(s)</td>
<td>Select the group configuration(s) that can edit this workflow.</td>
</tr>
</tbody>
</table>

2. Enter the appropriate information.

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 14: 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:

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Notification Name</td>
<td>Edit the name as desired.</td>
</tr>
<tr>
<td>Display as From</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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 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:

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variables</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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%                                            | 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                                                             |
<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variables</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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 |
Section 14: Email Notifications

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variables</th>
<th>Description</th>
</tr>
</thead>
</table>
| Request From          | Field Label: %L_SubmittingUserName%  
Field Value: %SubmittingUserName% | Employee that submitted the request (delegate or proxy)                      |
|                        | **NOTE:** This field label and field value are not currently available in Concur Request. Do not use them in email notifications. |
| 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 Concur. Contact Concur Client Services 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 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:

![Workflows Configuration](image-url)
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:

![Travel Details section image]

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.
**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:

![Sample of initial email image](image-url)
Sample of modification email:

![Sample of modification email](image)

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modifying Language</td>
<td>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.</td>
</tr>
<tr>
<td>Email Notification Name</td>
<td>Edit the name of the email notification. This name will appear in the email notification list while editing the workflow.</td>
</tr>
<tr>
<td>Notification Type</td>
<td>(read-only)</td>
</tr>
</tbody>
</table>
| 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 Concur cannot be removed.

To remove an email notification:

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

2. Click Remove. The email notification is deleted.

Section 15: 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.

**What the User Sees**

**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.

![Final Review](image)

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.

![Final Confirmation Message Box](image)

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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a unique name. This name is used internally in the request workflow. It is not seen by the user or approver.</td>
</tr>
<tr>
<td>Title</td>
<td>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.</td>
</tr>
</tbody>
</table>
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
- `<BR>` 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 Procedure: 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 16: 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>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow users to select their own approver for requests</td>
<td><strong>If this check box is selected (enabled) and:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>“Prompt” setting in user profile is:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Default approver is:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Then....</strong></td>
</tr>
<tr>
<td>Selected (On)</td>
<td>Identified</td>
</tr>
<tr>
<td>Selected (On)</td>
<td>Not identified</td>
</tr>
<tr>
<td>Cleared (Off)</td>
<td>Identified</td>
</tr>
<tr>
<td>Cleared (Off)</td>
<td>Not identified</td>
</tr>
</tbody>
</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.

| Display request approval links to approvers on My Concur               | 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. |

| Prevent request submission when exception level exceeds \( X \) | 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. |
Section 17: Integrated with Travel Configuration

### Setting Description

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter expenses to those that are applicable to Cost Object</td>
<td>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. <strong>NOTE:</strong> 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.</td>
</tr>
</tbody>
</table>

2. Click **Save**.

### Section 17: Integrated with Travel Configuration

Clients that have Request integrated with Travel can enable the Approve then Book (Request to Travel) process flow in Workflow or the Book then Approve (Travel to Request) process flow. For Request workflow configuration options for the Approve then Book (Request to Travel) process flow, refer to the subsections in this section. For the Book then Approve (Travel to Request) process flow, there is no need for a Request workflow configuration.

When opting for the Approve then Book process flow, clients can choose between two booking methods:

1. The user is always sent to Concur Travel after approval of their request to self-book the segments.
2. The user chooses, for each request, to self-book the request segments, or send them to an agent.

For more information, refer to the *Integrated with Travel* section of this guide.

A third possible setup option is to offer Travel and Request to the user in a non-integrated mode. Users will be able to create a request but are not forced to do so prior to booking in Travel. Any booking a user does in Travel will not automatically generate a new request or update an existing request.

### Configuration for the Approve then Book Process Flow

Both booking methods require the basic configuration listed below. The agent booking method requires the additional configuration listed in the *Agency Booking Configuration* section below.
The system can be configured to enforce the *Approve then Book* process flow, by preventing the users from accessing the *Travel* tab. This means that the only method the users have to book travel is by clicking *Book/Book in Concur Travel* on their approved request. This configuration should only be applied to users that have no other reason to access the Travel tab, such as assistants or delegates that book guest travel. This configuration is detailed in the *Restrict Access to Travel Tab* section below.

### Basic Configuration

The *Approve then Book (starting in Request)* process flow requires the following configuration steps:

1. The Request Configuration Administrator must enable the four main **Default Request Segment Types** (Air Ticket, Car Rental, Hotel Reservation, and Railway Ticket) on the corresponding Request Policy.

   ![Modify Request Policy: Default Request Policy](image)

   **NOTE:** The Approve then Book process for train tickets only supports SNCF and UK Rail Trainline.

   - For more information, refer to the *Concur Request: Policies and Groups Setup Guide*.

2. The Request Configuration Administrator must create a new workflow email notification to inform the employee that their request has been approved and is now pending booking. This reminds the employee to begin the booking process as soon as the request is approved.

   - For more information, refer to the *Email Notifications* section of this guide.
3. The Request Configuration Administrator must create a new step in the Request Workflow after Manager Approval, labeled **Approved - Pending Booking**. Set **Role** to **Request User**, set the **Initial Status** to **Approved-Pending Booking**, and set **Enter Step Employee Notification** to the new email notification you created in the previous step.

![Add Workflow Step](image)

**NOTE:** This step should always be placed after all the approval steps, as the Approved- Pending Booking status indicates to the system that there are no more required approvals. Informative or procedural steps may be added after the Approved- Pending Booking step (Processor step, Budget step).

For more information, refer to the *Workflow Configuration – Creating* section of this guide.
4. The Request Configuration Administrator must decide whether to allow Travel to update the request amounts with the booked amounts after the user has completed their booking. By default, the request amounts can be updated by Travel after the request has reached the Approved – Pending Booking workflow step. To prevent Travel from updating the request amounts, the administrator must clear (disable) the Enable Request Segments to be updated by an itinerary when booking on an approved Request setting in Administration > Request > Site Settings.

For more information, refer to the Request: Site Settings Setup Guide.

The administrator can configure an email notification that notifies the approver whenever a request amount is updated after approval. This email notification may be sent regardless of whether the Enable Request Segment to be updated by an itinerary when booking on an approved Request setting is enabled.

For more information, refer to the Notification to Approver When Booked Amount is Greater than Approved Amount section of this guide.
5. If the Request Configuration Administrator does not allow the request amount to be modified post-approval, they should enable the default audit rule, **Amount Changed Post Approval**. This audit rule will notify the request owner, approver, and processor if the request amount is updated post-approval, providing more visibility into the change. The Request Configuration Administrator enables this rule in **Administration > Request > Audit Rules**.

For more information, refer to the *Request: Audit Rules Setup Guide*.

**Notification to Approver When Booked Amount is Greater than Approved Amount**

The administrator can configure an email notification to the request approver with the updated request amount if the request amount has changed after approval.

This feature is configured using the following steps:

1. Create a workflow email notification to send to the approver, including the appropriate variables.
   - If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting enabled, the administrator uses the %TotalApprovedAmountBeforePEBK% and the %TotalPostApprovedAmount% variables in the workflow rule and email notification.
   - If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting disabled, the administrator uses the %TotalApprovedAmount% and the %TotalPostApprovedAmount% variables in the workflow rule and email notification.

2. Add a new step to the request workflow, after the **Approved – Pending Booking** step.
3. Configure two step rules for the new workflow step:
   - One rule to email the approver if the Request Total Post Approved Amount is greater than the Approved Amount Before Booking or Total Approved Amount.
   - One rule to always skip this workflow step.

In addition to this feature, the Approved Amount Before Booking value can be used in Audit Rules and Exception messages, if desired.

For more information, refer to the Concur Request: Audit Rules and Concur Request: Exceptions Setup Guides.

To create the workflow email notification:

1. Click Administration > Request.
2. Click Workflows (left menu).
3. Click Email Notifications.
4. Select an existing email notification and click Copy.
5. Enter the email notification name.

6. Click Next.
7. Add the necessary variables to the email body:
   - If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting enabled, the administrator uses the `%TotalApprovedAmountBeforePEBK%` and the `%TotalPostApprovedAmount%` variables in the email notification.
   - If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting disabled, the administrator uses the `%TotalApprovedAmount%` and the `%TotalPostApprovedAmount%` variables in the email notification.

![Workflows](image)

8. Click **Next**.

9. Add the variable to the delegate email.

10. Click **Done**.

   **To create the new workflow step:**

   1. Click **Administration > Request**.
   2. Click **Workflows**.
   3. Select the desired workflow.
   4. Click **Modify**.
   5. Click **Next**.
6. Click the **Approved – Pending Booking** workflow step.

7. Click **New**.

8. Add a new workflow step called **Send Email**.

9. Click **Save**.

10. Click **Next**.

11. Select the **Send Email** workflow step.

12. In the **Step Rules** area, click **New**.
13. Create a step rule comparing the necessary variables:

- If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting enabled, the administrator uses the **Approved Amount Before Booking** and the **Total Post Approved Amount** variables.

- If the company has the **Enable Request Segments to be updated by an itinerary when booking on an approved Request** site setting disabled, the administrator uses the **Total Approved Amount** and the **Total Post Approved Amount** variables.

![Edit Condition Diagram]

This example will send the email if the **Total Post Approved Amount** (amount updated after the booking is done) is greater than the **Approved Amount Before Booking** by more than 10%.

14. Click **Save**.

15. In the **Rule Action** area, click **New**.
16. Create a new email action using the email notification.

![Edit Action](image1)

17. Click **Save**.

18. In the **Step Rules** area, click **New**.

19. Create a new step rule that always evaluates true. In this example, the rule verifies that the employee ID is not blank.

![Add Condition](image2)
20. Click **Save**.

21. In the **Step Action** area, click **New**.

22. Select **Skip Step** in the **Action Name** field.

23. Click **Save**.

24. Click **Done**.

**Configuring Pre-Approval Conditions**

Concur Travel can be configured with two rule actions specifically designed for the Request and Travel integration:

- Require Pre-approval & Log
- Require Pre-Approval & Notify
The benefit of these rule actions in an integrated Travel and Request process is that they respond dynamically as different actions depending on the workflow (Approve then Book or Book then Approve). It is no longer necessary to create multiple Travel rule classes for multiple Request user groups if the travel policy is the same.

- For users in a group with the Approve then Book workflow, the rule will show in Travel as *Log for Report or Notify Manager* because the trip was pre-approved.
- For users in a group with the Book then Approve workflow, the rule will show in Travel as *Require Approval*.

⚠️ Do not configure a “Require approval” condition in Concur Travel if the Approve then Book process is used. SAP Concur does not support a post-booking approval process if the trip was already pre-approved in Request.

For more information about travel policy rule actions used when Concur Travel is integrated with Concur Request, refer to Appendix A – Travel Integrated with Request > Rule Actions section in the Concur Travel: Approvals, Rules, and Classes/Policies Travel Service Guide.

**Agency Booking Configuration**

If the request user should be able to decide whether the request is booked by an agent or self-booked, the Request Configuration Administrator must add a custom field with a custom list to the request header. Then the administrator modifies the workflow step rule to check for this field value.
This functionality is used with the Approve then Book (starting in Request) process flow. For more information, refer to the Request to Travel Process Flow section of this guide.

- **To create the booking method list:**
  1. Click **Administration > Request**.
  2. Click **List Management**
  3. Click **New**.
  4. In the **List Name** field, enter `Request Booking Methods`.
  5. Click **Save**.
  6. In the list item area, click **New**.
7. Enter the following list items:

<table>
<thead>
<tr>
<th>List Item Name</th>
<th>List Item Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-booked</td>
<td>SELFBOOK</td>
</tr>
<tr>
<td>Agency-booked</td>
<td>AGENTBOOK</td>
</tr>
</tbody>
</table>

8. Click **Done**.

- **To add the booking method field to the request header:**
  1. Click **Administration > Request**.
  2. Click **Forms and Fields**.
  3. Select **Request Header** in the **Form Type** list.
  4. Click the **Fields** tab.
  5. Select an unused custom field (Custom1-Custom20).
  6. Click **Modify Field**.

7. Make the following changes:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Name</td>
<td>Enter &quot;You want this trip to be&quot;</td>
</tr>
<tr>
<td>Data Type</td>
<td>Select <strong>List</strong>.</td>
</tr>
<tr>
<td>Default List</td>
<td>Select &quot;Request Booking Methods&quot;</td>
</tr>
<tr>
<td>Access Rights</td>
<td>Set Request Employee Role to <strong>Modify</strong>. All other roles set to <strong>Read-only</strong>.</td>
</tr>
</tbody>
</table>

8. Click **Save**.

9. Click the **Forms** tab.

10. Select the desired form.

11. Click **Add Fields**.
12. Select the custom field.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Site Required</th>
<th>Data Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Code</td>
<td>No</td>
<td>Connected List</td>
<td>Active</td>
</tr>
<tr>
<td>Project Group</td>
<td>No</td>
<td>Connected List</td>
<td>Active</td>
</tr>
<tr>
<td>Region</td>
<td>No</td>
<td>Connected List</td>
<td>Active</td>
</tr>
<tr>
<td>Reporting Group</td>
<td>Yes</td>
<td>Integer</td>
<td>Active</td>
</tr>
<tr>
<td>Request Key</td>
<td>Yes</td>
<td>Integer</td>
<td>Active</td>
</tr>
<tr>
<td>Request Type</td>
<td>No</td>
<td>Text</td>
<td>Active</td>
</tr>
<tr>
<td>Risk Zone</td>
<td>No</td>
<td>Integer</td>
<td>Active</td>
</tr>
<tr>
<td>Start Time</td>
<td>No</td>
<td>Text</td>
<td>Active</td>
</tr>
<tr>
<td>Submit Date</td>
<td>No</td>
<td>Date</td>
<td>Active</td>
</tr>
<tr>
<td>Total Approved Amount</td>
<td>Yes</td>
<td>Amount</td>
<td>Active</td>
</tr>
<tr>
<td>Total Posted Amount</td>
<td>Yes</td>
<td>Amount</td>
<td>Active</td>
</tr>
<tr>
<td>Total Remaining Amount</td>
<td>Yes</td>
<td>Amount</td>
<td>Active</td>
</tr>
</tbody>
</table>

13. Click **Add Fields**.

14. Click the **Form Fields** tab.

15. Select the desired form.

16. Select the custom field.

17. Click **Modify Form Fields**.

18. In the **Tooltip** field, enter the following text, modified if necessary to suit the company’s travel policy:

    Selecting “Self-booked” will allow you to book the itinerary in Travel. Selecting “Agency-booked” will send this itinerary to a travel agent to book on your behalf. Depending on your itinerary, you may not be able to book in Travel, especially if you need both air and rail, or if you need more than 6 Air Ticket segments.

19. Click **Save**.
To modify the workflow step:
1. Click Workflows (left menu).
2. Select the desired workflow.
3. Click Modify.
4. On the General page, click Next.
5. On the Steps page, click Next.
6. Select the Pending Booking step.
7. Click New in Step Rules area.
8. Add a new rule checking for the custom field:

![Edit Condition](image)

9. Click Save.
10. Click New in the Rule Actions section.
11. Select **Skip Step**.

12. Click **Save**.

When the workflow skips the Pending Booking step, it should move to the Final Approval step. At this point, the email notification configured in the policy will go to the travel agent, letting them know to book the itinerary.
Handling Requests That Can’t be Booked in Travel

When using the Approve then Book process flow in Workflow, sometimes an itinerary being requested cannot be booked in Concur Travel. The request may be outside the capabilities of Concur Travel - such as an itinerary with more than 6 air segments, or the request may have dates in the past.

If the itinerary cannot be booked in Concur Travel, a system message like the following will be generated:

![Warning Message]

For more information, refer to the Concur Request: Policies and Groups Setup Guide.
Handling Requests Outside Concur Travel Capabilities

The Request administrator can add a custom field on the Request header so that a request user can choose to have this type of itinerary booked by their travel agency, skipping the Approved – Pending Booking workflow step. This option allows the user to click Cancel at the error message, then update the Request header field to re-route the itinerary.

For more information about creating this type of custom field, refer to the Integrated with Travel Configuration > Agency Booking Configuration section of this guide.

Handling Requests with Dates in the Past

The Request administrator can configure Request to handle itineraries that cannot be booked in Concur Travel because the request contains segment dates that are in the past.

One option is to create a workflow step rule that skips the Approved – Pending Booking workflow step when a request segment date is in the past.

Another option is to create a specific Request policy and workflow that never transitions through the Approved – Pending Booking workflow step for these requests.

**NOTE:** If you are using the Enforce Online/Offline policy setting (Administration > Request > Site Settings), and a user submits a request with dates in the past, the user will automatically be sent to Travel and will see an error message. There is no configuration to prevent this.

If your organization is using the Enforce Online/Offline policy setting and will be creating requests with dates in the past, it is best practice to set the Enforce Online/Offline policy to Yes – Traveler Decides, and when a user is creating a request with dates in the past, have the user click the Submit anyway button when the error message appears in Travel.

The setting must be set to Yes – Traveler Decides to ensure the Submit anyway button is displayed in the error message dialog. The button is not displayed when the setting is set to No or Yes.

For more information about Request policies, refer to the Concur Request: Policies and Groups Setup Guide.

For more information about creating workflows, refer to the Overview - Workflow Configuration section in this guide.

For more information about the Enforce Online/Offline policy setting, refer to the Concur Request: Site Settings Setup Guide.
Offline PNR Retrieval Configuration

Client that use the offline PNR retrieval booking within the Request process must have the following configuration for the appropriate workflow.

For more information, refer to the Concur Request: TMC Integration Setup Guide.

To configure the workflow step:

1. Click Administration > Request.
2. Click Workflows.
3. Modify the desired workflow, or copy an existing workflow.
5. Click New to add a new workflow step.
6. Fill in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step Name</td>
<td>TMC Step</td>
</tr>
<tr>
<td>Role</td>
<td>TMC Agent</td>
</tr>
<tr>
<td>Initial Status</td>
<td>Submitted &amp; Pending Approval</td>
</tr>
<tr>
<td>Approval Actions</td>
<td>Approve</td>
</tr>
<tr>
<td>Agency Approval Notification</td>
<td>None</td>
</tr>
<tr>
<td>Enter Step Employee Notification</td>
<td>None</td>
</tr>
<tr>
<td>Email employee when step is complete</td>
<td>Unselected (disabled)</td>
</tr>
<tr>
<td>Can exit step with blocking exceptions</td>
<td>Selected (enabled)</td>
</tr>
</tbody>
</table>

**NOTE:** Do not configure an Authorized approver step after the TMC step. If multiple authorized approvers are available, the system won’t choose one by default. The request will then be stuck on the TMC step after the update.
7. Click **Save**. The new step appears in the workflow.

8. Use the arrows to move to step to be right after Request Submitted.

9. Click **Done**.

**Restrict Access to Travel Tab Configuration**

SAP Concur recommends that clients using the *Approve then Book* process flow restrict their users from accessing the *Travel* tab. Some clients have experienced duplicate requests when their users bypass the *Book/Book with Concur Travel* link in the approved request, and instead go directly to the *Travel* tab to book their trip after the request is approved. The trip is treated as a new trip and causes a duplicate request.
This configuration hides the Travel tab for the user (including the Trip Library section of the Travel page), preventing them from booking in Concur Travel before creating a request. This ensures that users are managing their trips in Concur Request. Users who are restricted from viewing the Travel tab can only book travel by selecting the Book/Book in Concur Travel link/button in the approved request.

To restrict access to the Travel tab, the company administrator must remove the Travel Wizard User permission from the desired users. This permission can be assigned to the user in multiple ways:

- **Travel Wizard User** check box on the User page
- Travel Wizard User permission on the User Permissions page
- Inherited from a group or rule class on the User Permissions page
- The 300/305 Employee Import, Travel Wizard User column

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

Removing the Travel Wizard User permission will have two effects that need to be mitigated by other user permissions.

First, it also hides the Travel Profile section of Profile, which is required for booking travel. In order to allow users to manage their information in the Travel Profile, assign them the Profile User permission when removing the Travel Wizard User permission.

Second, users without the Travel Wizard User permission will be unable to book travel, even from an approved request. In order to allow users to only book from an approved request, assign them the Approve then Book user permission.

**NOTE:** Please be aware that if a user and their delegate are assigned to the Request User permission and the Profile User permission, but are not assigned to the Travel Wizard User permission, the Can Book Travel check box will not be displayed on the Request Delegates page or Expense Delegates page (Profile > Profile Settings > Request Delegates or Expense Delegates).

In other words, restricting access to the Travel tab is a valid approach to hone the Approve then Book process flow, but only for companies with no or limited bookings done by a delegate.

### To remove the user permission on the User page:

**NOTE:** After removing the Travel Wizard User permission on the User page, you must also assign the Profile User permission and the Approve then Book user permission to the user on the User Permissions page.

1. Click Administration > Company > Company Admin.

2. Click User Administration (left menu).
3. Search for the desired user.
4. Click the user’s name. The **User** page appears.
5. Clear (disable) the **Travel Wizard User** check box.

![Image: Company Admin Page]

6. Click **Save**.

**To configure the user in User Permissions:**

1. Click **Administration > Company > Company Admin**.
2. Click **User Permissions** (left menu).
3. Click **Travel**. The **Administer Company Permissions** page appears.
4. In the **Modify Permissions by** list, select **Users**.
5. In the **User Name** list, select the desired user.
6. In the left pane, select the **Profile User** permission. This permission allows the user to maintain their Travel Profile information.

7. Click **Add**.

8. In the right pane, identify the **Travel Wizard User** permission and where it is coming from. In this example, the user inherited the permission from the ALL group, and had the permission directly assigned to them.

9. If the permission was assigned directly, select it and click **Remove**.

10. If the permission was assigned by a group, modify your group configuration as necessary to remove the user permission.
11. In the left pane, select the **Profile User** and **Approve then Book** permissions.

12. Click **Add**. This assigns the Profile User and Approve then Book permissions to the user.

13. Click **Save**.

   For more information about modifying Travel groups, refer to the *Concur Travel: Company Administration User Guide*.

**Passive Approval**

The Passive Approval feature allows the request approver to choose whether to act on a request that is pending their approval. If the approver does not act on the request, the request is updated with the passive approval action. Without this feature, if the request approval date expires, the request remains in the **Pending Approval** status, leading to an inconsistency between the trip and the request status.

The Passive Approval feature is configured per-policy on the Request Policies page. The Request Configuration Administrator can define the passive approval action. The administrator configures three settings for the feature:

- **The passive approval action**: This is set to Approve or Send Back. The Approve action will auto-approve all the workflow steps to set the request status to **Approved**.
- **The expiration timeframe (in days post-submit)** for requests pending approval: Once the expiration date is reached, the passive approval action is applied to the request.
- **The number of hours prior to the Last Approved Date of the request to trigger the passive approval action**: Once the configured hour is reached, the passive approval action is applied to the request. The Last Approved Date is configured in Travel, and applies to Air and Rail segments.

**NOTE:** If Passive Approval is used, then the Approval Time Expired Action field must be empty. If not, the conditions would be in conflict.

   For more information, refer to the *Concur Request: Policies Setup Guide*.

**Post Approval Trip Updates**

The Post Approval Trip Update feature allows travelers to make changes to their travel plans after the request has been approved, by recalling an approved request and resubmitting it. This prevents the travelers from having to make their trip changes through a TMC, and provides an additional approval opportunity for the changed trip.

Once the user recalls the request, if it is already past the Last Approval Date, then the user has 24 hours from the time they recall the request to resubmit it, or the trip will be cancelled. If the request requires approval after re-submit, and does not receive that approval before the approval time limit, the trip is cancelled.
The Request Configuration Administrator can configure a workflow step rule, using the Previous Approved Amount variable, that compares the previous approved amount to the new approved amount. Depending on the difference, the client can decide whether the updated request requires approval. Concur recommends that clients skip approval on the resubmitted request unless the amount has changed significantly.

The Post Approval Trip Update feature is only available to clients with a TMC that supports the feature.

**What the User Sees**

Once approved, the user will be able to recall a request for a trip they need to modify.
After recalling the request, the user clicks **Modify** on the **Segments** tab to change their trip.
Then the user clicks **Change Trip** from the itinerary.

Once the user has modified their trip, they need to resubmit the request. Depending on the workflow configuration, the approval steps may be skipped, if the request amount has not changed significantly.

**NOTE:** All the existing restrictions still apply. For example, modifying a flight ticket will be possible only if the option “Allow post ticketing flight changes” is available and activated for the client.

For more information about ticketing restrictions, refer to *Concur Travel: Travel System Admin User Guide*.

**Configuration**

The Post Approval Trip Update feature is enabled in Request Policies. After the feature is enabled, a workflow step rule should be configured to skip the approval step if the amount change is small enough. The *Previous Posted Amount* variable appears in **Workflow** if the feature is enabled.

**To enable the feature:**

1. Click **Administration -> Request -> Request Policies**.
2. Select the desired policy.
3. Click **Modify**.
4. Select (enable) the **Enable Post Approval Trip Update** check box.

5. Click **Next** through the wizard.

6. Click **Done**.

**To configure the workflow step rule:**

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

2. Select the desired workflow.

3. Click **Modify**.

4. Click **Next** twice to reach the **Step Rules** step.

5. Select the approval step.

6. Click **New** in the **Step Rules** area.
7. Enter the following values:

![Edit Condition](image1)

8. Click **Save**.

9. With the step rule selected, click **New** in the **Rule Actions** area.

10. Enter the following values:

![Edit Action](image2)
11. Click **Save**.

12. Click **Done**.