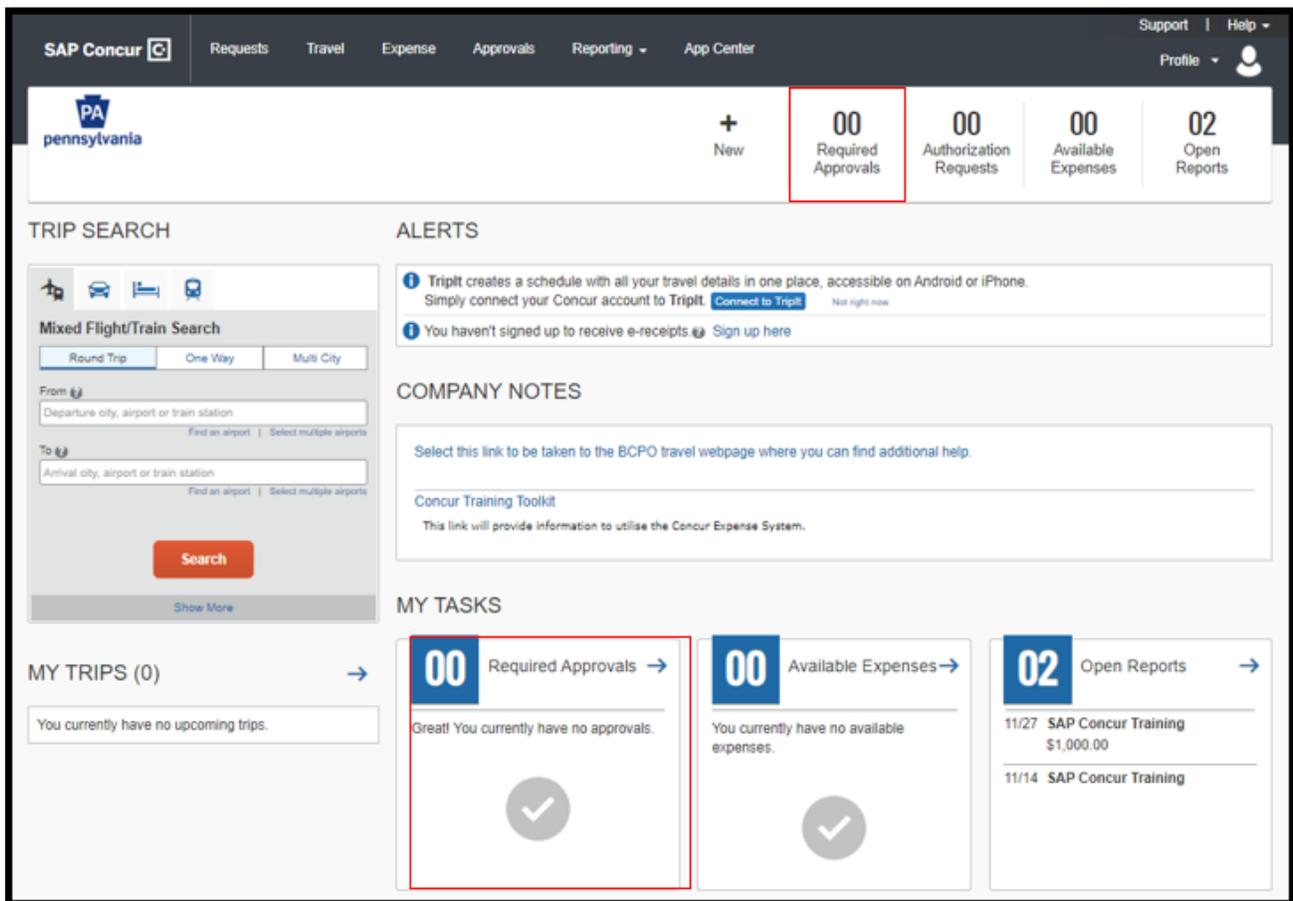


User Guide – Request Approver

A request approver is a supervisor, manager, or a delegate who is granted permission to approve travel request workflow. This user guide is intended to show how to perform tasks as a request approver. **Note:** The use of SAP Concur Request is not required by Commonwealth travel policy.

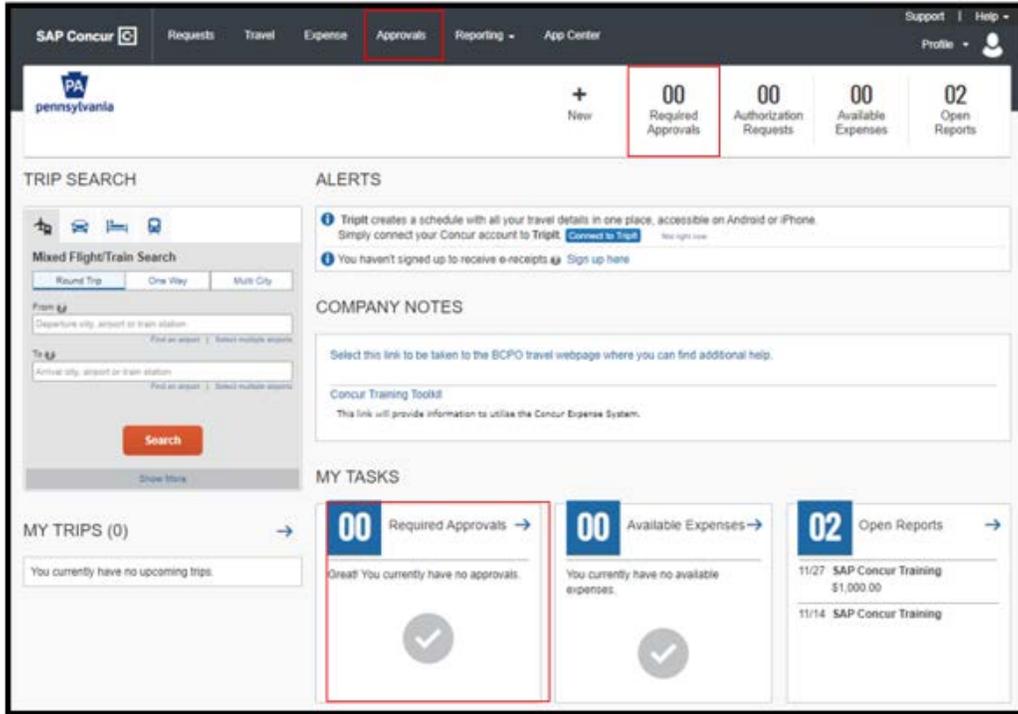
Home Page

1. Sign into SAP Concur to access your home page. [Reference: SAP Concur User Guide – Signing In]
2. On the home page, any requests and expense reports pending your approval will be visible in the My Tasks section in the Required Approvals area.



The screenshot displays the SAP Concur home page for a Request Approver. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. A summary bar at the top right shows '00 Required Approvals', '00 Authorization Requests', '00 Available Expenses', and '02 Open Reports'. The 'MY TASKS' section is highlighted with a red box and contains three cards: '00 Required Approvals' (with a checkmark icon), '00 Available Expenses', and '02 Open Reports' (listing two training items).

- If there are more work items pending than are visible on the home page, you can click on either of the **Required Approvals** links or the **Approvals** tab on the menu bar.



Approvals Page

- On the approvals page, there is a tab for each type of work item and each tab will show a count of items that need approval. Work the count to zero to complete your approval tasks.

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
<input type="checkbox"/>	Travel Training-Harrisburg-11/11/19b SAP Concur Training	334Q	Traveler1, Test User	11/11/2019 11/15/2019	12/12/2019	\$55.80
<input type="checkbox"/>	Travel Test Request -silk Audit Trip	333F	Traveler1, Test User	04/18/2019 04/19/2019	12/12/2019	\$225.00

- Select the **Request Name** link for the request that you wish to review. Link will be unique to the title of the Request.

Request Page

1. On the request page, review the **Request Header** tab for general information either entered by the employee or defaulted from the employee's profile. Approvers can add a comment in this area if they wish.

Request 334Q [Test User, Traveler1]

Reason for Trip: Training-Harrisburg-11/11/19b
Purpose: SAP Concur Training

Status: Submitted & Pending Approval
Amount: \$55.80

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Policy: *COPA-Not Integrated with Travel
Trip Type: In State
Reason for Trip: Training-Harrisburg-11/11/19b
Trip Start Date: 11/11/2019
Trip End Date: 11/15/2019
Purpose: SAP Concur Training
Comment

Business Area: (B1) Executive Offices
Fund: (1062200200) Office of the Budget
Budget Period: (2019) FY 2019
Cost Center

Internal Order
WBS

Employee Name: Test User, Traveler1
Employee Number: traveler1
Employee Group: TEST USER

2. The **Segments** tab will contain details related to Air, Hotel, and Car Rental. The amounts provided are estimates.

Request 333F [Test User, Traveler1]

Reason for Trip: Test Request -slk
Purpose: Audit Trip

Status: Submitted & Pending Approval
Amount: \$225.00

Request Header Segments Expense Summary Approval Flow Audit Trail

Hotel Reservation Amount: \$100.00

Check-In
City: Niagara Falls, New York
Date: Thursday, April 18, 2019
Detail: Resort Hotel

Check-Out
Date: Friday, April 19, 2019

Comment:

Allocate Modify

3. The **Expense Summary** tab is a list of all expenses the traveler estimates will be incurred on the trip.

- a. Click on the **Allocate** button to display the allocations for the request.
- b. Click on the **View segment detail** button to go open the Segments tab.

Request 333F [Test User, Traveler1]

Reason for Trip: Test Request -silk
Purpose: Audit Trip

Status: Submitted & Pending Approval
Amount: \$225.00

Request Header | Segments | **Expense Summary** | Approval Flow | Audit Trail

Date	Expense Type	Amount	Requested
04/19/2019	Hotel room charge	\$100.00	\$100.00
04/19/2019	Daily Allowance	\$75.00	\$75.00
04/19/2019	Daily Allowance	\$50.00	\$50.00

TOTAL AMOUNT: \$225.00 | TOTAL REQUESTED: \$225.00

Expense Type: Hotel room charge
Transaction Amount: 100.00 USD

Allocate | **View segment detail**

4. The **Approval Flow** tab can be used to identify where the Request is in the approval process. An approver can add a workflow step if it needs to be reviewed by additional personnel. Click on the **Add a step before this step** button (blue plus icon) to add an approver.

Request 333F [Test User, Traveler1]

Reason for Trip: Test Request -silk
Purpose: Audit Trip

Status: Submitted & Pending Approval
Amount: \$225.00

Request Header | Segments | Expense Summary | **Approval Flow** | Audit Trail

Manager Approval:
Test User, Approver1

User-Added Approver:
[] [+] [+] [x]

5. The **Audit Trail** tab shows the tracking of the request and changes made to it. If requests are sent back to the traveler, all comments are also documented in this section.

Request 333F [Test User, Traveler1]

Reason for Trip: Test Request -slk
Purpose: Audit Trip

Request Header Segments Expense Summary Approval Flow **Audit Trail**

Status: Submitted & Pending Approval
Amount: \$225.00

Request Level

Date/Time	Updated By	Action	Description
04/18/2019 10:58 AM	Test User, Traveler1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
04/18/2019 10:58 AM	Test User, Traveler1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
08/16/2019 10:37 PM	System, Concur	Approval Status Change	Status changed from Submitted & Pending Approval to Approval Time Expired Comment:
08/16/2019 01:11 PM	System, Concur	Approval Status Change	Status changed from Submitted & Pending Approval to Approval Time Expired Comment:
12/12/2019 10:45 AM	Test User, Traveler1	Request Recall	Status changed from Submitted & Pending Approval to Sent Back to Employee Comment:
12/12/2019 10:45 AM	Test User, Traveler1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
12/12/2019 10:45 AM	Test User, Traveler1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
12/12/2019 11:19 AM	Test User, Approver1	Workflow Step Added	Added a workflow step with approver :
12/12/2019 11:23 AM	Test User, Approver1	Workflow Step Removed	Removed a user-added workflow step with approver :

Entry Level

Date/Time	Updated By	Action	Description
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Segment Level

Date/Time	Updated By	Action	Description
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6. Click on the **Attachments** button to display a list and select:
 - a. **Check Documents** link to display any attachments on the request in a new window; or
 - b. **Attach Documents** link to attach additional documents.

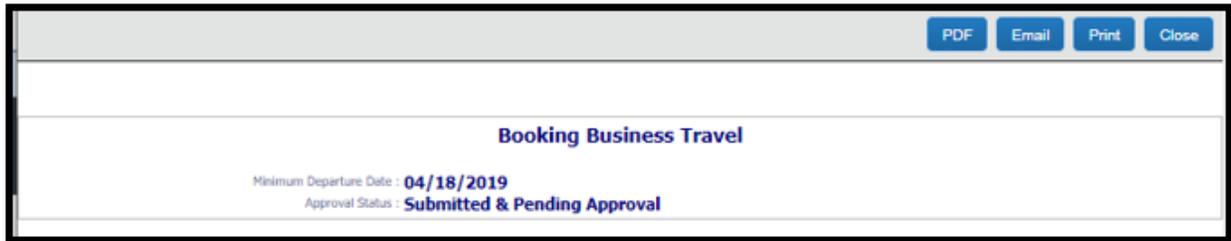
Attachments ▾ Print / Email ▾ Send Back Request Approve Approve & Forward

Status: Submitted & Pending Approval
Amount: \$225.00

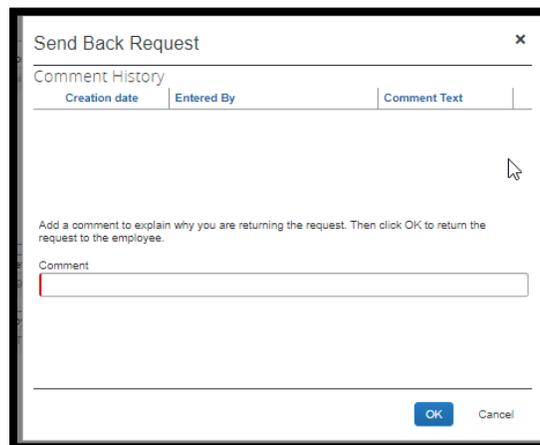
Check Documents
Attach Documents

Request Processing Options

1. When the approver is completed with their review, they can click on one of the following buttons:
 - a. **Print/Email** – opens the request in document form. At this point, the approver has the following options:
 - i. **PDF** – click this button to save the report as a .pdf document.
 - ii. **Email** – click this button to email the report to an alternate email address.
 - iii. **Print** – click this button to print the report.
 - iv. **Close** – click this button to close the document and go back to the Request page.



- b. **Send Back Request** – sends the request back to the employee. Enter comments to explain why you are returning the request. Click the **OK** button to continue or click the **Cancel** button to go back.

A screenshot of a "Send Back Request" dialog box. It has a title bar with a close button (X). Below the title bar is a "Comment History" section with a table with columns "Creation date", "Entered By", and "Comment Text". Below the table is a text area with the instruction: "Add a comment to explain why you are returning the request. Then click OK to return the request to the employee." Below the text area is a "Comment" input field. At the bottom right, there are "OK" and "Cancel" buttons.

- c. **Approve** – approves the request. Clicking approve will approve the request immediately.
- d. **Approve & Forward** – approves the request and allows the approver to add a User to forward the expense report to within the agency. Add an approver to the User-Added Approver field, if necessary, and click the Approve button when finished.

A screenshot of a "Approve & Forward" dialog box. It has a "Manager Approval" section with a text input field containing "Test User, Approver1" and a close button (X). Below that is a "User-Added Approver" section with a text input field, two plus signs (+) for adding users, and a minus sign (-) for removing users. At the bottom, there is a "Search Approvers By" dropdown menu.