Last Updated 12/18/2019

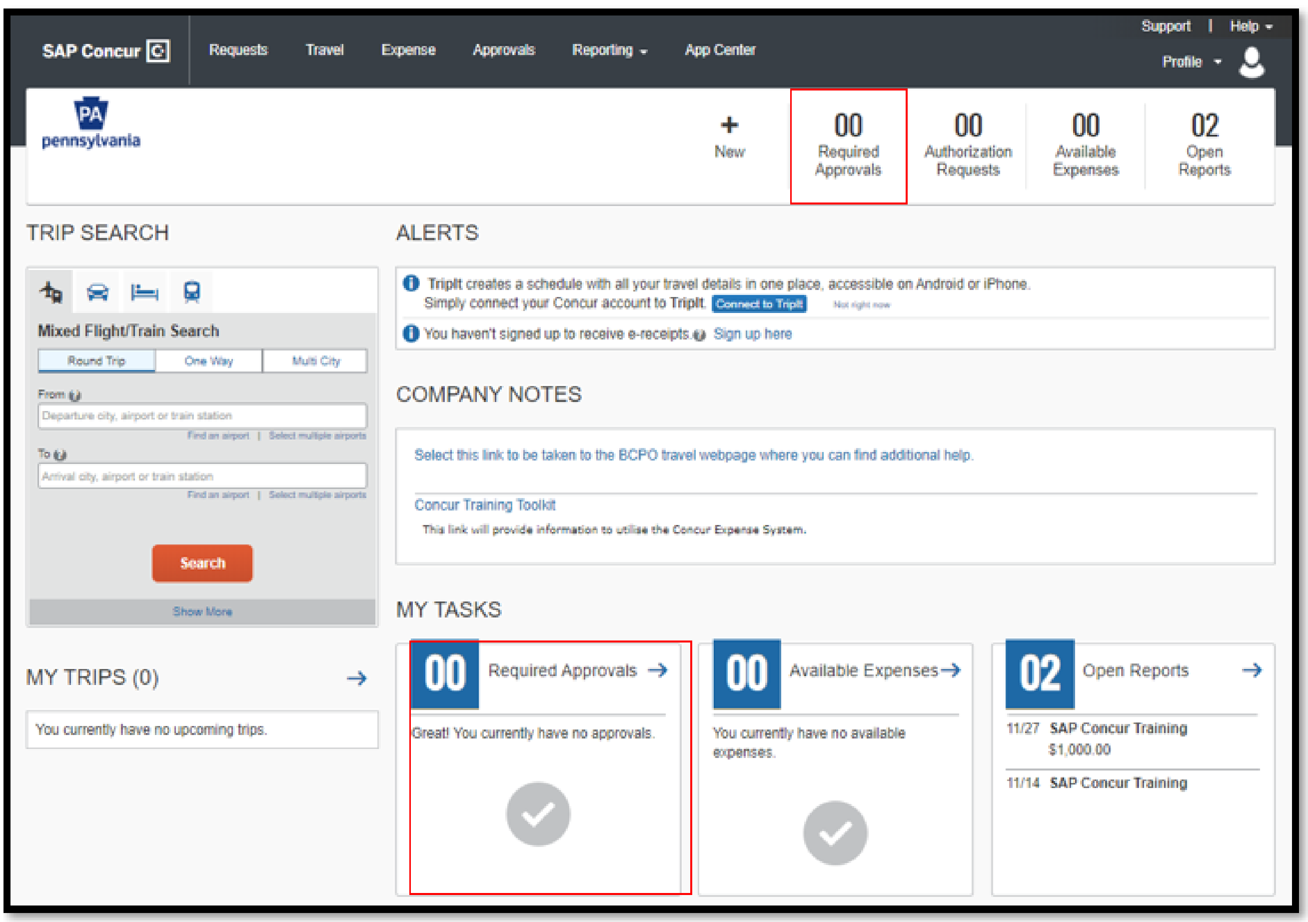
User Guide – Request Approver

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.

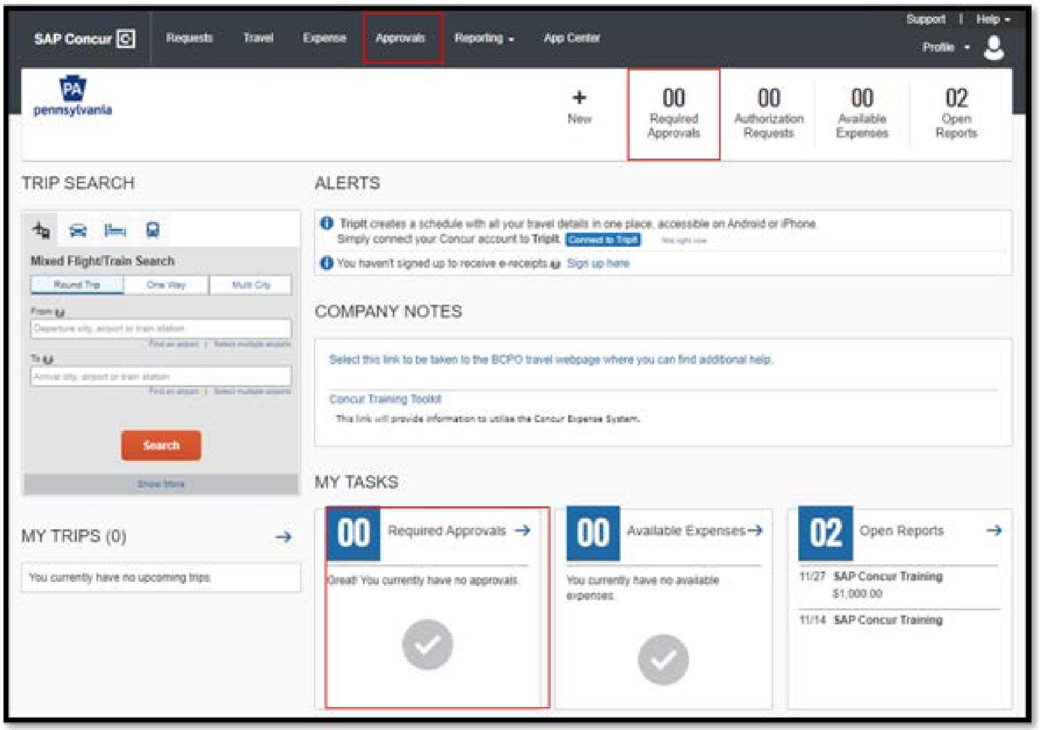
Home Page

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.

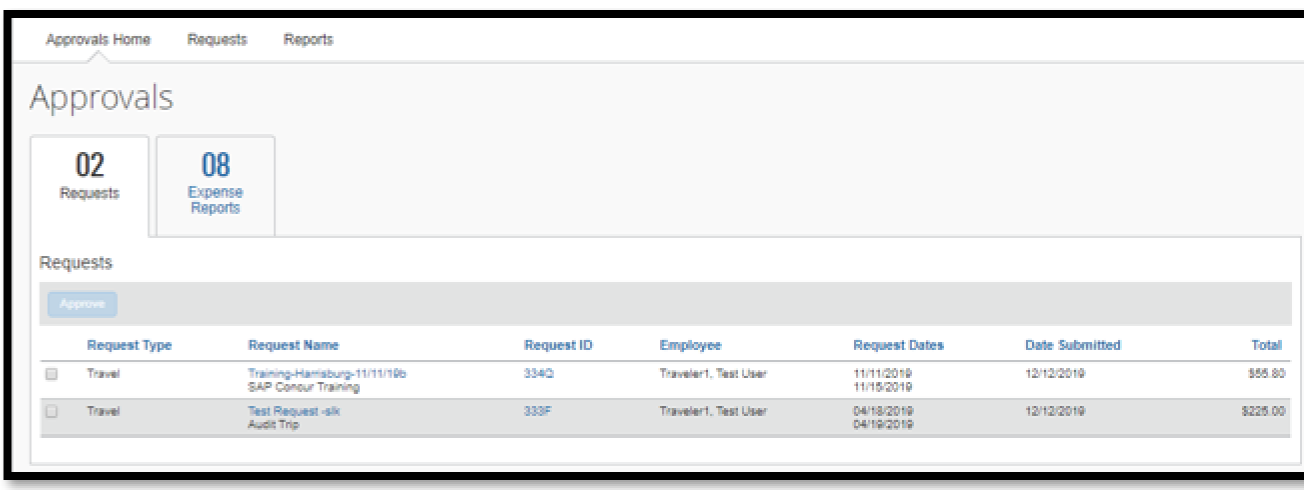


3. If there are more work items pending than are visible on the home page, you can click on either of the **Required Approvals** links or the **Approvals** tab on the menu bar.



Approvals Page

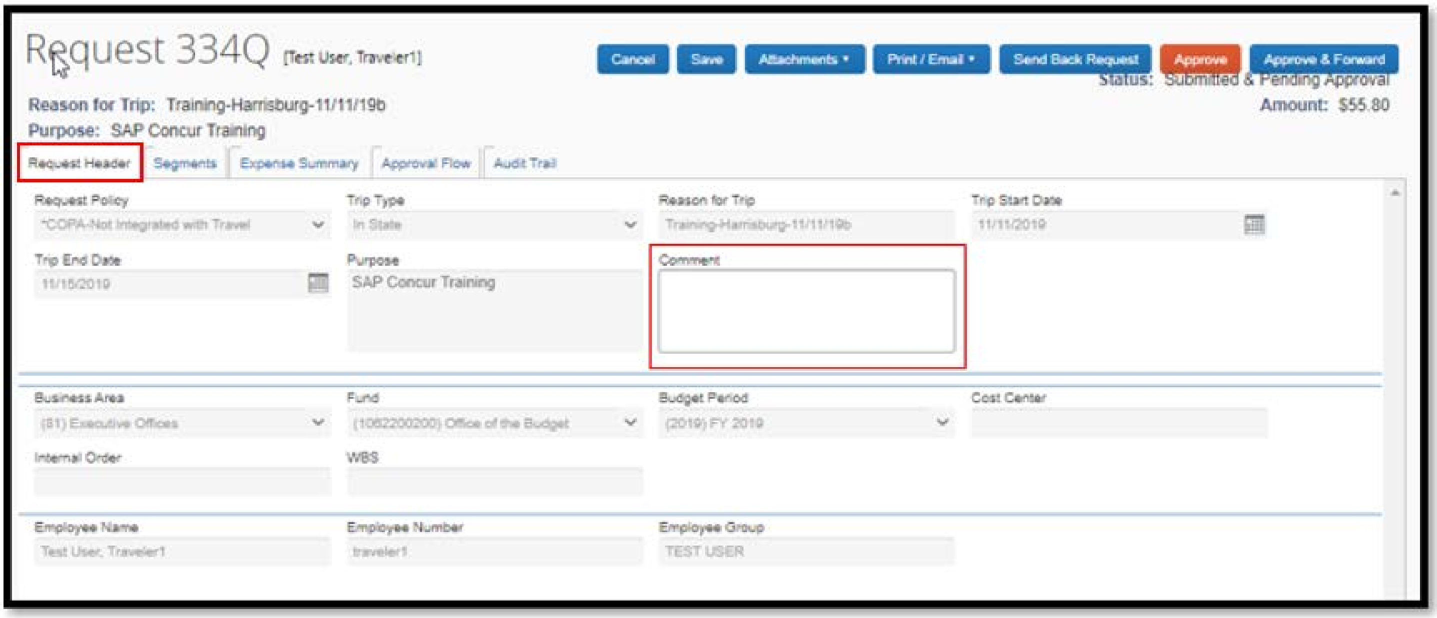
1. On the approvals page, there is a tab for each type of work item and each tab will show a count of items that need approval.   Work the count to zero to complete your approval tasks.



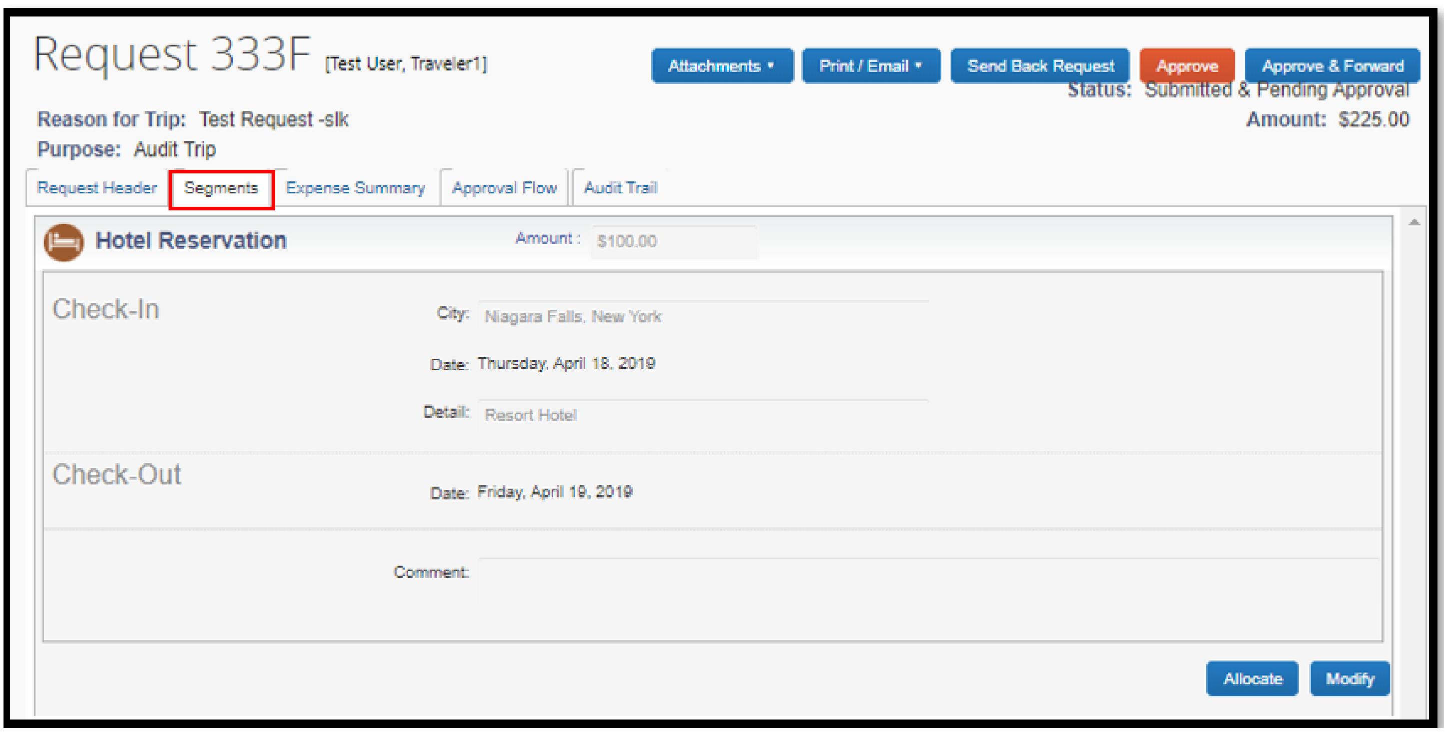
2. Select the **Request Name** link for the request that you wish to review. Link will be unique to the title of the Request.

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.

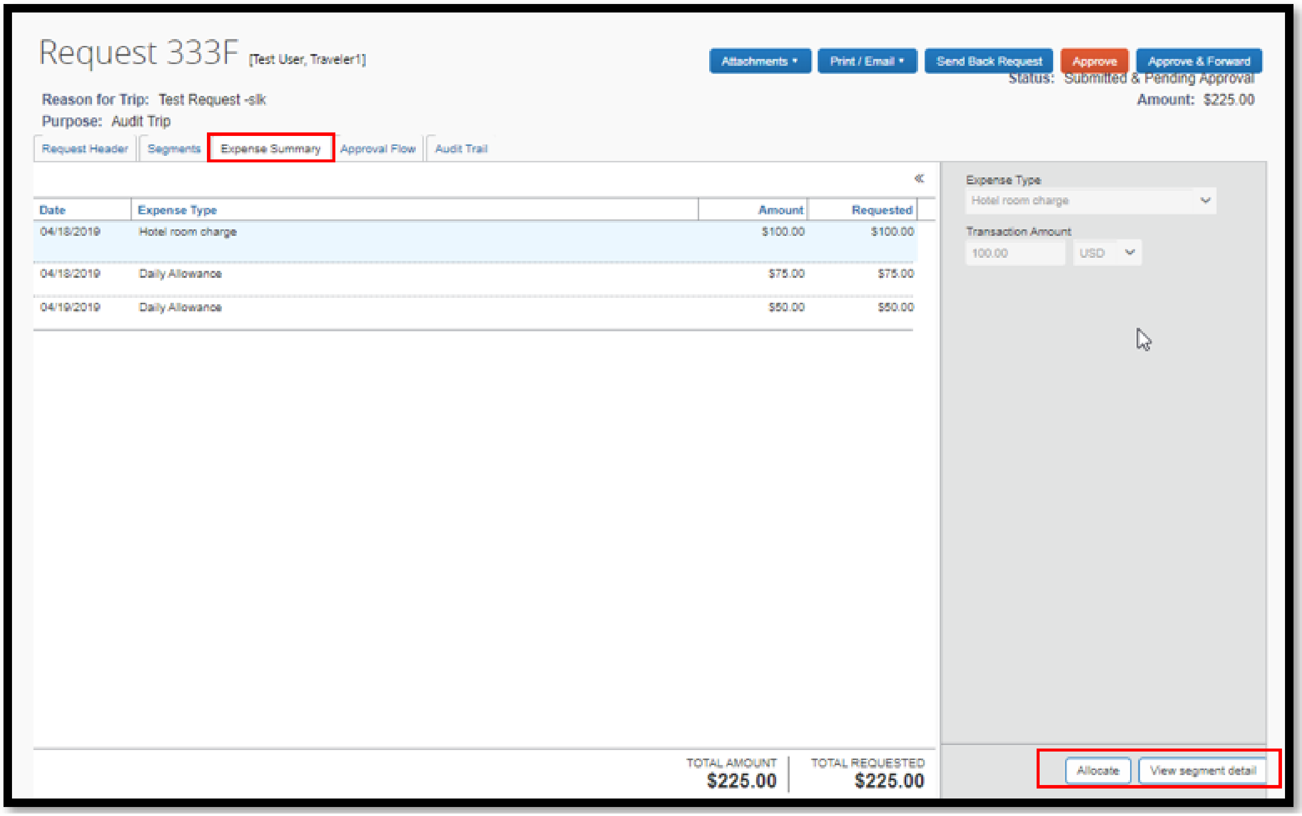


2. The **Segments** tab will contain details related to Air, Hotel, and Car Rental. The amounts provided are estimates.

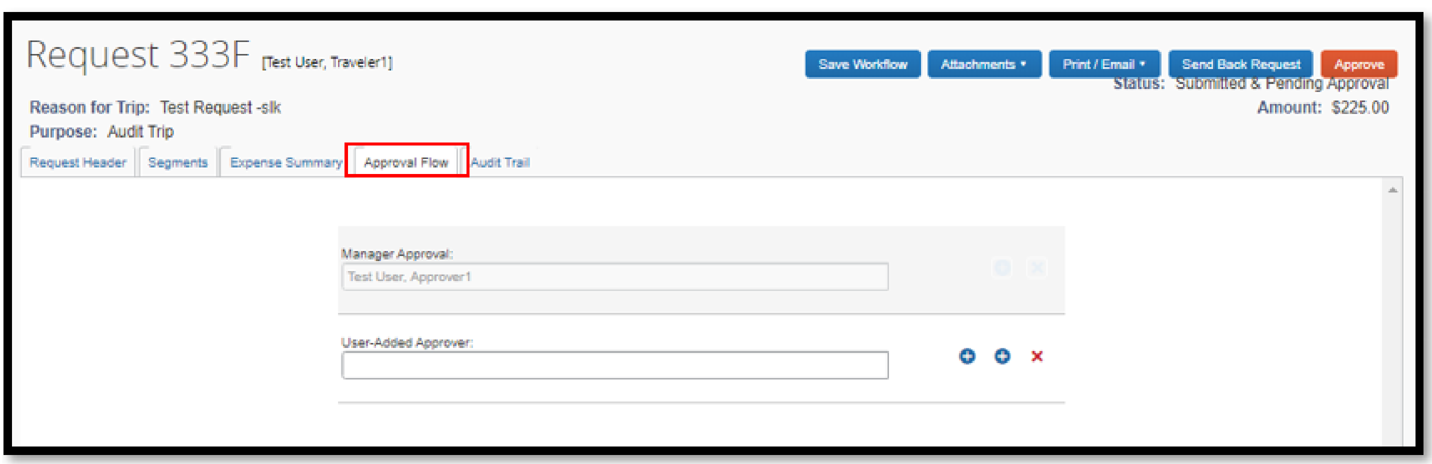


3. The **Expense Summary** tab is a list of all expenses the traveler estimates will be incurred on the trip.

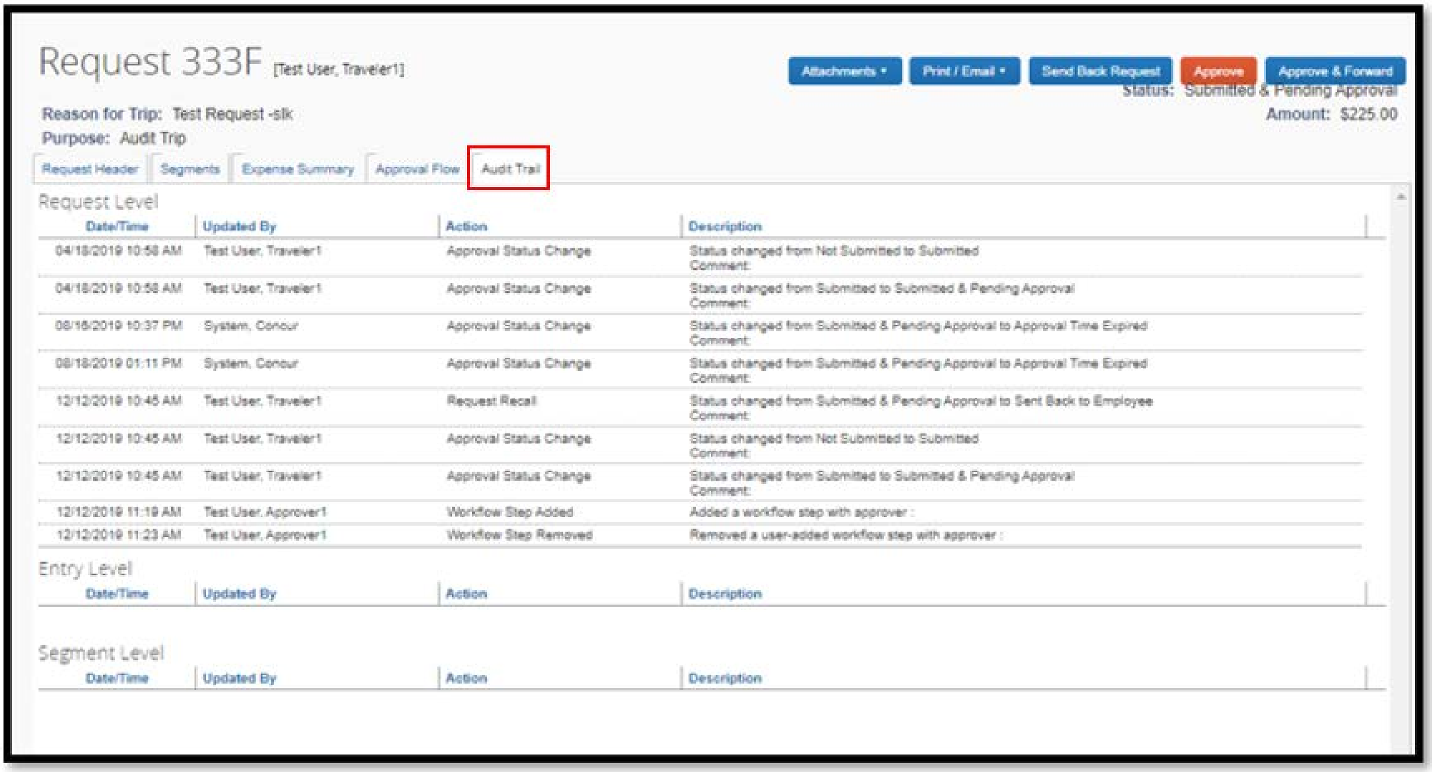
a. Click on the **Allocate** button to display the allocations for the request.
b. Click on the **View segment detail** button to go open the Segments tab.



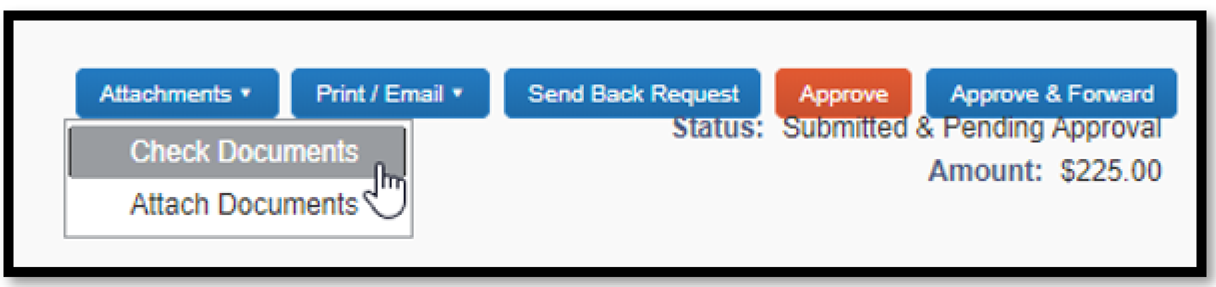
4. The **Approval Flow** tab can be used to identify where the Request is in the approval process. An approver can add a workflow step if it needs to be reviewed by additional personnel. Click on the **Add a step before this step** button (blue plus icon) to add an approver.



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.



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.

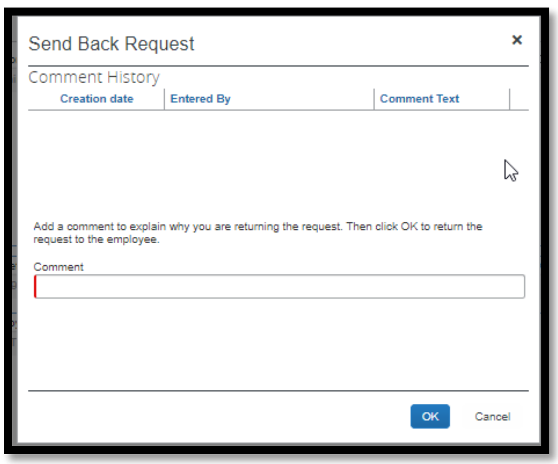


Request Processing Options

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.



   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.