

Concur How-to: Setting Approval Flow ^[1]

The approval flow within the Concur Travel & Expense System is the record of all approval steps for an expense report. Depending on the information in the expense report, some approval steps might be required – such as officer or campus approval – while others might not.

Read the procedures

1. Use the **Details** dropdown and select **Approval Flow**. The Approval Flow window appears.
2. Each approval step indicates whose approval is needed (such as manager, SpeedType, officer, etc.) and the order of approvals (from the top of this list to the bottom). Names that are faded – or “grayed out” – cannot be changed.
3. Approvers with names that are not faded can be changed. Search for the appropriate approver by name, use the asterisk (*) to search for all available approvers for that step.
4. To add an additional approver, use the plus signs to the right of the approver field. Hover your mouse over the plus signs to determine where an approval step will be inserted – one plus sign inserts an approval step before the listed approver and the other plus sign inserts one after.
5. A **User-Added Approver** field will appear above, or below, the approval step where the button was clicked. You can select anyone who is an approver within Concur for this approval step. Search for this approver by last name.
6. Click the **Save Workflow** button once the approval flow is set appropriately.
7. You may now submit your expense report; or, if you are a delegate, notify the cardholder that the report is ready for submission.

Have a question or feedback?

Questions & Feedback ^[2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Source URL: <https://www.cu.edu/psc/training/reconciling-concur/setting-approval-flow>

Links

[1] <https://www.cu.edu/psc/training/reconciling-concur/setting-approval-flow>

[2] <https://www.cu.edu/controller/forms/questions-feedback-0>