

Concur – Workflow and Report Tracking

Approval of Concur documents will be handled through the approval queue in Concur. Workflow will determine the approvers required for each report. Each Concur Report can be tracked through the Concur Approval Flow and Report Timelines.

Workflow

Concur reports will workflow through multiple levels of approval before posting to SAP.

Concur Reports will workflow through the following path for approvals:

1. Procard holder/Traveler – The Procard holder or traveler will be responsible for starting the workflow by submitted his/her own reports for approval.
2. Supervisor – The Concur report will workflow to the Supervisor of the Procard holder or the Traveler based upon the Procard holder or traveler’s HR assignment.
3. Budget Officer(s) – The Concur report will workflow to all of the Budget Officers assigned to the Workflow Approver Table based on the Concur report’s cost objects.
4. Healthcare – For those Procard holders or travelers employed in a HealthCare department (7HXXX, MXXXX, or HXXXX), Concur reports will workflow to UK Healthcare Accounting. All other departments will skip this step.
5. Accounts Payable – All travel expense reports will workflow to Accounts Payable Services for final review and approval. A select grouping of General Expense Reports will also flow to Accounts Payable for final review and approval.

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Different types of Concur users will have different roles and responsibilities within the system.

Each Concur user may have one or more of the following roles in Concur:

Role	Role Description
Delegate	A Procard holder, traveler and approver can add delegates and assign permissions such as create reports or approve reports on behalf of the individual.
Procard Holder/Traveler	Responsible for submitting his/her own travel requests and expense reports timely.
Supervisor	Responsible for timely review and processing of all Concur reports for compliance with all University policies and procedures.
Budget Officer	Responsible for timely review and processing of all Concur reports for compliance with University policies and procedures and appropriate funding.
Accounts Payable	Responsible for final review and processing of all travel expense reports and select General Expense reports.

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Where is my Concur Request in workflow?

For a Request, click on the Request tab to see a listing of your Requests and the Status column will show the request's status.

The screenshot shows the SAP Concur interface for managing requests. At the top, there are navigation tabs for 'Requests', 'Travel', and 'Expense'. Below the navigation, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (14)'. Below this, there is a search bar with fields for 'Request Name' and 'Begins With', and a 'Go' button. A table lists the active requests with columns for 'Request Name', 'Request ID', and 'Status'. The table contains the following data:

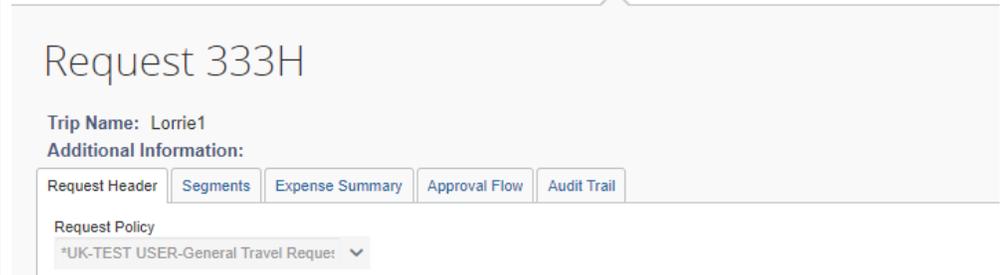
<input type="checkbox"/>	Request Name	Request ID	Status
<input type="checkbox"/>	Travel Request report	333L	Submitted & Pending Approval - Test, Default Approver
<input type="checkbox"/>	Lorrie1	333H	Pending Cost Object Approval
<input type="checkbox"/>	Copy of Lorrie1	333M	Submitted & Pending Approval - Test, Default Approver
<input type="checkbox"/>	Lorrie4	333J	Submitted & Pending Approval - Test, Default Approver
<input type="checkbox"/>	Lorrie5	333K	Submitted & Pending Approval - Test, Default Approver
<input type="checkbox"/>	MS Allocations	3339	Approved
<input type="checkbox"/>	Nashville Trip	333W	Approved
<input type="checkbox"/>	CN-Testing Status	333Y	Not Submitted

The Status column could show:

- Not Submitted – The traveler has not submitted the travel request for approval.
- Submitted and Pending Approval – The travel request has been submitted for approval but the traveler's supervisor has not approved the request.
- Pending Cost Object Approval – The travel request is pending approval by 1 or more budget officers.
- Approved – The request has been approved by the Supervisor and Budget Officer.

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To see more about the workflow and how long the current approver has had the request pending in his/her approval queue, click on the Request Name.



Then click on Approval Flow:

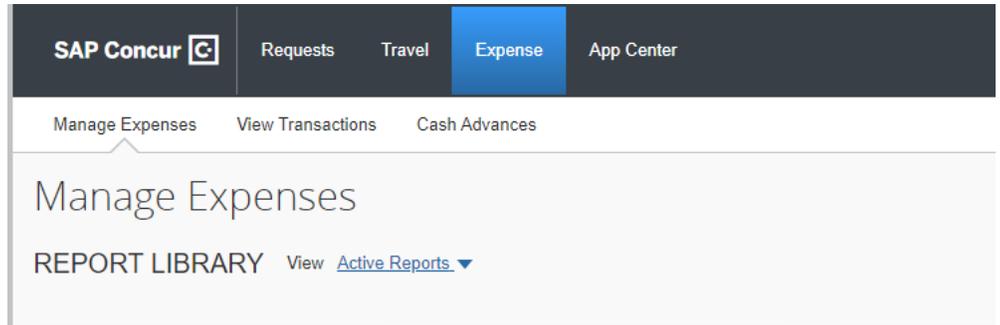


You will be able to see the date of the previous approval and name of the next approver.

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Where is my Expense Report in workflow?

For a Concur expense report, click on the Expense tab to see your report library of Active Reports.



Three statuses of reports will show in your Active Reports library:

1. Returned – Returned reports are those reports that you may have recalled from the workflow or those reports that have been sent back to you for modifications.
2. Not Submitted – The Procard holder or traveler has not submitted the report for approval.
3. Submitted – The Concur report has been submitted and will be in one of the following statuses:
 - a. Submitted & Pending Supervisor Approval
 - b. Pending Cost Object Approval
 - c. Submitted & Pending Accounts Payable Approval
 - d. Approved – Processing Payment.

Scroll down the Active Reports library until you see the expense report in question:

SUBMITTED 07/23/2020	SUBMITTED 07/23/2020	SUBMITTED 07/23/2020	SUBMITTED 07/23/2020
CN-Testing All Per Diems	CN-Credits and Expenses	LSD capital 7/23/20	LC no meals
\$20.00	\$1,704.80	\$1,374.13	\$137.50
Pending Cost Object Approval	Submitted & Pending Supervisor Approval Default Approver Test	Submitted & Pending Supervisor Approval Default Approver Test	Approved Processing Payment

To see more details on the workflow approvers, click on the report name.

Go to Report Details and click on Report Timeline

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CN-Testing All Per Diems \$20.00
Pending Cost Object Approval

[Report Details](#) ▼ [Print/Share](#) ▼ [Manage Receipts](#) ▼ [Travel Allowance](#) ▼

Report	Expense Type
Report Header	Daily Allowance
Report Totals	Daily Allowance
Report Timeline	Daily Allowance
Audit Trail	Daily Allowance
Allocation Summary	Daily Allowance
Linked Add-ons	Daily Allowance
Manage Requests	Daily Allowance
Manage Cash Advances	Daily Allowance

The Report Timeline will show previous approvals and pending approvals.

Report Timeline

CN-Testing All Per Diems | \$20.00

Approval Flow [Edit](#)



Report Summary

SUBMITTED
Test, Traveler1 07/23/2020

SUBMITTED & PENDING SUPERVISOR APPROVAL
Test, Traveler1 07/23/2020

APPROVED
Test, Default Approver 07/23/2020