

TravelWayne

"Add-A-Step" Approval Workflow Process

User Guide

The Add-A-Step process allows the traveler to add a level approver to the approval flow before or after the required approval.

Section 1: Add a Step Before or After this Step – Travel Request

How to	Additional Information
1. Create and Complete a Travel Request	The Manager Approval is pre-populated with the traveler's manager which has already been identified based on the traveler's Concur profile.
2. Click the Approval Flow tab.	
3. Click the up arrow to Add a Step	
Before this Step	This process allows you to add another person to review a transaction before it goes to designated Manager Approval
Travel Request 34DF	Save Workflow Attachments • Print / Email • Cancel Travel Request Submit Travel Request
Trip Title (Short Description): Conference	Status: Sent Back to Employee Amount: \$12,016.00
Travel Request Header Segments Approval Flow Audit Trail	
	^
User-Added Approver:	1 X

4. A new field **User-Added Approver** will appear click inside the field and begin typing in the **Last Name** of the Approval Flow

Manager Approval: Matthews, Michael

> **Note:** The person you are selecting to be added to the Approval Flow must be a Travel Request Approver. Therefore, you may need to complete the (Approver "At Large") Form and submit to Disbursements.

Add a step before this step

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Travel Request 33WV Trip Title (Short Description): Nurisng Confe	erence			Save Workflow	Attachments		Delete Travel Request	Submit Travel Request Status: Not Submitted
Travel Request Header Segments	Approval Flow	Audit Trail						A
	User-Addeo A tAtkinson, Employee	Approver: tBryan (ao1480@v ID: tao1480	vayne.edu)			± ×		
	Org Unit 2 Search Ap	-Dept ID: Account	Payable		~	₽ ± ×		

Section 1: Add a Step Before or After this Step -<u>Travel Request</u> (continued)

How to...

Additional Information

5. Click the down arrow to Add a Step After This Step

Note: Complete steps 4 above to add the person to the Approval Flow after the Manager Approval

vel Request 33WV		Save Workflow	Attachments -	Print / Email 🔹	Delete Travel Request	Submit Travel Reque
Title (Short Description): Nurisng Conference						Status: Not Submi
vel Request Header Segments Approval Flow	Audit Trail					
Manager	Approval:					
Manager Matthew	Approval: s, Michael			<u>*</u> ×		
Manager Matthew	Approval: s, Michael			± ×		
Manager Matthew User-Add	Approval: s, Michael led Approver:					
Manager Matthew User-Ado	Approval: , Michael led Approver:			± × ∓ ± ×		

 Click on the individuals name from The Search Approvers By drop down menu

aver nequest 55%	••				Save WORKHOW	Attachments •	Finit / Email *	Delete Havel Request	Submit Travel Reque
ip Title (Short Description):	Nurisng Conferen	ce							Status: Not Subm
Fravel Request Header	Segments	Approval Flow	Audit Trail						
		Manager Ap	proval:						
		Matthews, I	Michael				A		
			incritici				<u> </u>		
							<u> </u>		
		User-Added	Approver:				<u> </u>		
		User-Added tAtkinson, t	Approver: Bryan (ao1480@wayne	.edu)			× •		
		User-Added tAtkinson, t tAtkinson,	Approver: Bryan (ao1480@wayne tBryan (ao1480@wayr	.edu) ie.edu)			₹ <u>×</u>		
		User-Added tAtkinson, t tAtkinson, Employee Org Unit 2	Approver: Bryan (ao1480@wayne tBryan (ao1480@wayn ID: tao1480 -Dept ID: Accounts Pa;	.edu) ne.edu) vable			₹ <u>×</u>		

7. Then Click the **Submit Travel Request** Tab

ravel Request 33WV		Save Workflow	Attachments 🝷	Print / Email 🔫	Delete Travel Request	Submit Travel Reque
ip Title (Short Description): Nurisng Conference						Status: Not Subm
Travel Request Header Segments	Approval Flow Audit Trail					
	Final Review			ο×		
	Travel Request Submit Confirmation					
	Are you sure you want to submit this Travel Request?					
		Submit	Travel Request	Cancel		
	User-Added Approver: tAtkinson, tBryan (ao 1480@wayne.edu)			ޱ×		

You have successfully completed the Add a Step Before or After this Step Process!!!

Section 2: Add a Step Before or After this Step Expense Report

How to...

1. Create and Complete a Expense Report

Additional Information

The Manager Approval is pre-populated with the traveler's manager which has already been identified based on the traveler's Concur profile.

2. Click the Details tab and select Approval Flow

2		NC	ur™ est Tra	vel Expense	e Profile	Help Log C)ut								2
	View Charge	es View	Reports	New Expense	e Report Vie	w Receipt Sto	e Approve Rej	ports	_						
	Expens	se Ce	nter	- Train1	Train1		in ilife					ALL DE LE DE	You are administering for	n : Me	•
ľ	Fun Co	nfere	nce										Delete Report	Submit Report	
	(+) New E	xpense	⊕ Qui	ick Expenses	Import	Details 👻	Receipts 👻	Print / Email	•				[Hide Exceptions	1
	Exception	ons				Report									-
	Expense N/A	D	ate	Amount	Exception	Report Totals Audit T	Header		10	rt as you selected your reas	on for travel is to "attend a cor	nference".			
	Expense	25				Approv	al Flow		w	Expense				Receipt Store	1
	Adding New	te ▼ w Expense /31/2012	Car F	Rental		Alloca t Allocat	ions ons		vi o	create a new expense, click pense, click the expense on	the appropriate expense type by the left side of the page.	P elow or type the expense typ	be in the field above. To edit a	an existing	
	Ø	,	ziite	huse		Travel New Iti Availab Expens Reimbu	Allowances nerary le Itineraries es & Adjustm ırsable Allowa	ents inces Summary	 1 VI	idging Hotel eals and Entertainment Breakfast Business Meal (attendees)	Other Conference Registration Fee Duplicating Individual Membership Fees Internet Fees	Other Telephone Expense Travel Visa Team Expenses Equipment Repair	Transportation Airline Fees (Bagga Bus Car Rental Gasoline	ge etc)	
-					١	OTAL AMOUN	T TOTAL	REQUESTED		Dinner Entertainment (attendees)	Laundry Meeting Room Fees	Practice Fees	Parking Personal Car Milear	ne v	

3. Click the up arrow to Add a Step Before this Step

C-ncur [*]		
My Concur Request Travel Expense Profile He	Log Out	
View Charges View Reports New Expense Report View R	Approval Flow for Report: Fun Conference	×
Expense Center - Train1 Train1		You are administering for: :
Fun Conference		Delete Report Submit Report
New Expense Quick Expenses Import D	Manager Approval:	I Hide Exceptions
Exceptions	Matthews, Michael	
Expense Date Amount Exception	Add a step	before this step
N/A 🔤 Reminder: Yo		
Expenses		Receipt Store
Date - Expense		
Adding New Expense		2
08/31/2012 Car Rental		• the expense type in the field above. To edit an existing
Enterprise		Transportation
		one Expense Airline Fees (Baggage etc)
		risa Bus
	Submit Report Save Workflow Cancel	enses Car Rental
		ient Repair Gasoline
TOTA	Dinner Laundry F	Practice Fees Parking
\$	225.00 \$225.00 Entertainment (attendees) Meeting Boom Fees	Feam Meals Perconal Car Mileage *

Section 2: Add a Step Before or After this Step Expense Report (Continue)

How to...

4. A new field User-Added Approver will appear click inside the field and begin typing in the Last Name of the person needed to be added to the Approval Flow

Jser-Added Approver:		
t	1	
TMatthews, TMichael (ay4887@wayne.edu) Employee ID: tay4887 Org Unit 2-Dept ID: Accounts Payable	(E)	
Train10, Train10 (travelwayne@wayne.edu) Employee ID: Train10 Org Unit 2-Dept ID: Addiction Research Institute	∓ <u>★</u> ×	
Train11, Train11 (travelwayne@wayne.edu) Employee ID: Train11 Org Unit 2-Dept ID: Nutrition & Food Science		
Train12, Train12 (travelwayne@wayne.edu) Employee ID: Train12 Oro Unit 2-Dept ID: Uroloov	~	
Search Approvers By	~	

5. Click the down arrow to Add a Step After This Step

Additional Information

Note: The person you are selecting to Be added to the Approval Flow must be an Expense Report Approver. Therefore, you may need to complete the (Approver "At Large") Form and submit to Disbursements.

Jser-Added Approver:		
Train 10, Train 10 (travelwayne@wa	ne.edu)	± ×
Manager Approval:		
		¥ ≛ ×
	Submit Report Save Wo	rkflow Cancel

Note: Complete steps 4 above to add the person to the **Approval** Flow after the Manager Approval

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You have successfully completed the Add a Step Before or After this Step Process!!!