



# **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...

1. Create and Complete a Travel Request

2. Click the **Approval Flow** tab.

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

### 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.

This process allows you to add another person to review a transaction before it goes to designated **Manager Approval**

Travel Request 34DF  
Trip Title (Short Description): Conference  
Status: Sent Back to Employee  
Amount: \$12,016.00

Save Workflow Attachments Print / Email Cancel Travel Request Submit Travel Request

Travel Request Header Segments **Approval Flow** Audit Trail

User-Added Approver: [Empty field] [Add] [Remove]

Manager Approval: Matthews, Michael [Add] [Remove]

Add a step before this step

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

**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.

Travel Request 33WV  
Trip Title (Short Description): Nursing Conference  
Status: Not Submitted

Save Workflow Attachments Print / Email Delete Travel Request Submit Travel Request

Travel Request Header Segments **Approval Flow** Audit Trail

User-Added Approver: [Dropdown menu open showing list of approvers]

Manager Approval: [Empty field] [Add] [Remove]

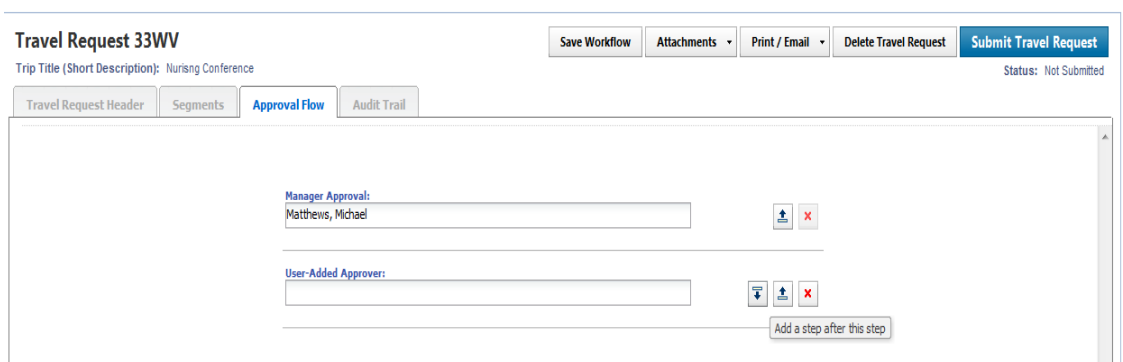
# Section 1: Add a Step Before or After this Step – Travel Request (continued)

**How to...**

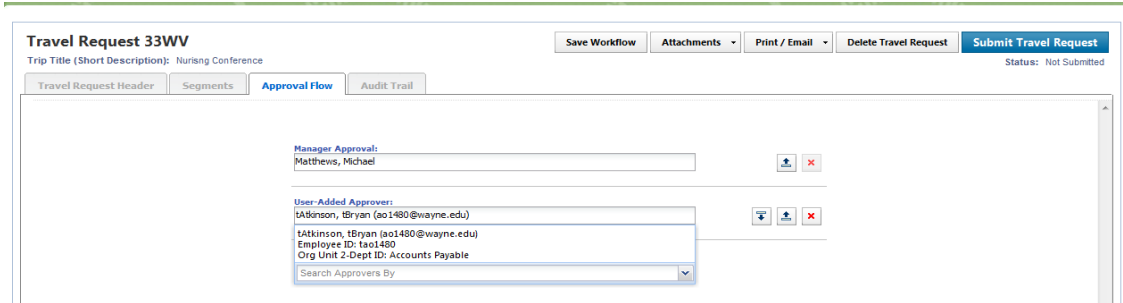
**Additional Information**

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

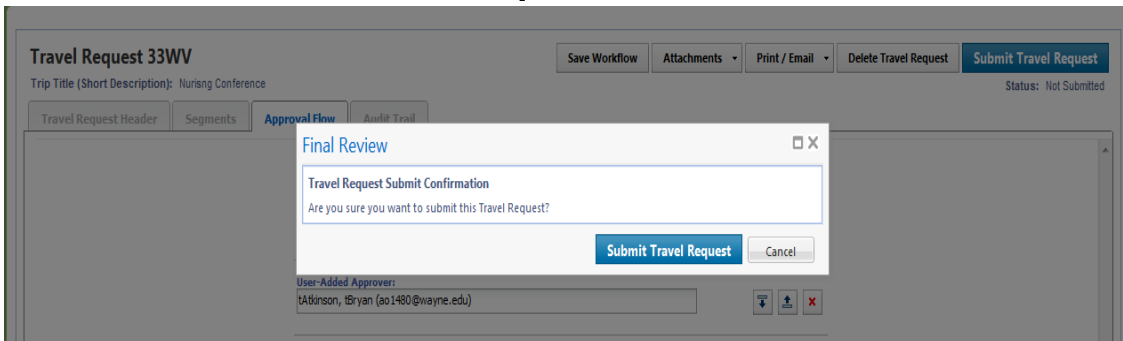
**Note:** Complete **steps 4** above to add the person to the **Approval Flow** after the **Manager Approval**



- 6. Click on the individuals name from The **Search Approvers By** drop down menu



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



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

The screenshot shows the Concur Expense Center interface for a report titled "Fun Conference". The "Details" menu is open, and "Approval Flow" is highlighted. The interface includes a navigation bar with "My Concur", "Request", "Travel", "Expense", "Profile", "Help", and "Log Out". Below the navigation bar, there are tabs for "View Charges", "View Reports", "New Expense Report", "View Receipt Store", and "Approve Reports". The main content area shows the "Fun Conference" report with a "Details" tab selected. The "Details" menu is open, showing options like "Report Header", "Totals", "Audit Trail", "Approval Flow", "Comments", "Allocations", "Travel Allowances", "New Itinerary", "Available Itineraries", "Expenses & Adjustments", and "Reimbursable Allowances Summary". The "Approval Flow" option is highlighted. The background shows the "Expenses" table with a total amount of \$225.00 and a total requested amount of \$225.00.

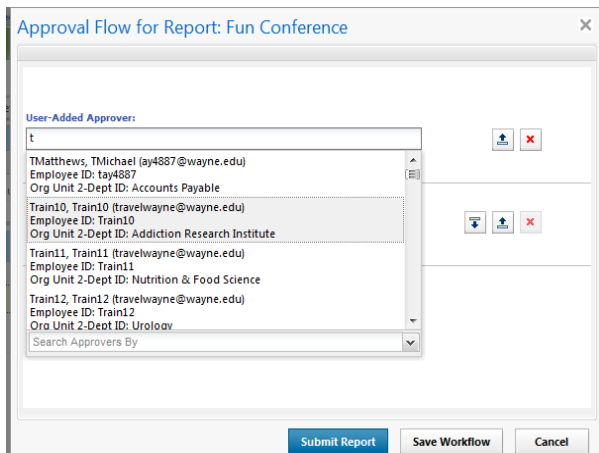
3. Click the up arrow to **Add a Step Before this Step**

The screenshot shows the Concur Expense Center interface with the "Approval Flow for Report: Fun Conference" dialog box open. The dialog box has a "Manager Approval:" field with "Matthews, Michael" entered. Below the field are three buttons: "Add a step before this step", "Submit Report", and "Save Workflow". The background shows the "Fun Conference" report with the "Details" tab selected. The "Expenses" table is visible, showing a total amount of \$225.00 and a total requested amount of \$225.00.

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

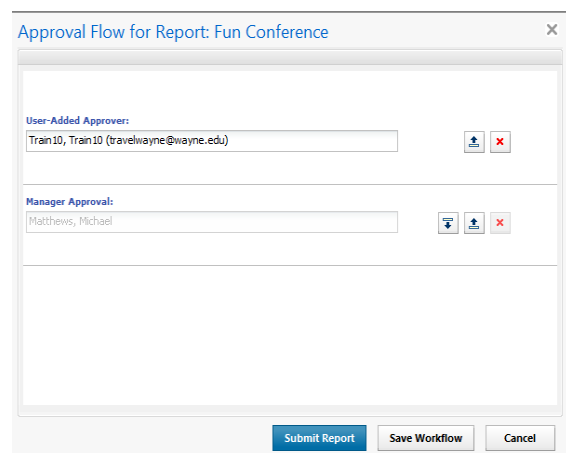
### How to...

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



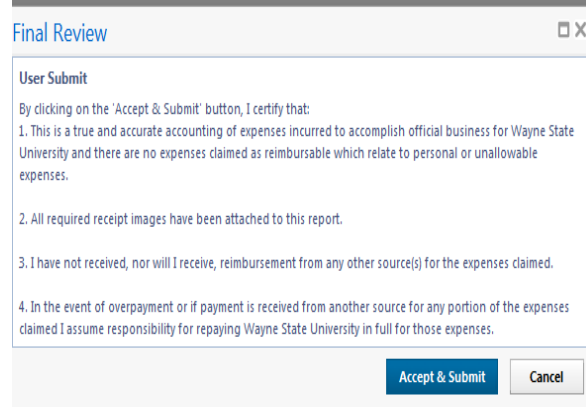
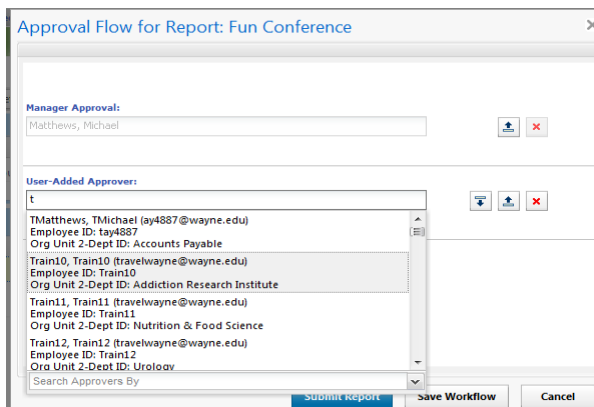
### Additional Information

**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.



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**



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