Approver Workflow Troubleshooting Scenarios:

1. Verify with your Department SAA:
   a. Roles AND routing are established for Phase II (Concur Phase I routing was deleted and must be re-established).
   b. The Financial Previewer within your Accountability Structure is not also the Financial Approver.
   c. The department has established "ALL" routing for Concur Users unless the Concur User is also the Financial Approver or another exception applies. This routing is especially critical if you have non-employee guest travelers, as they default to the "ALL" routing once associated with your Accountability Structure in Guest Traveler Routing (launching soon).

   Note: After items in step #1 are confirmed with your Department SAA, if any changes are made in EACS, please wait to proceed with steps # 2-4 until the following business day.

2. Before proceeding, please ensure that the Request/Report is **Recalled** to the Concur User (also known as Traveler or Payee). It's important to note that the Request/Report cannot be updated while it is in the workflow.

3. The Accountability Structure should be updated in the Request/Report header, including with the appropriate Approver ID and click **Save** (see scenarios a-c below).
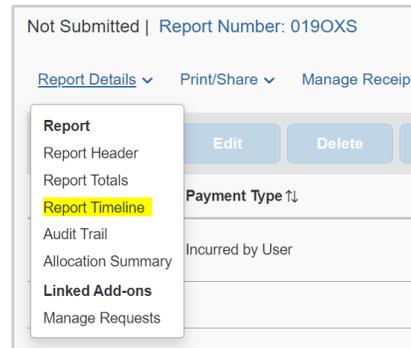

   a. If the Approver ID is blank, please skip to step #4 in this guide.
   b. If the Approver ID has the Financial Approver selected, resubmit the Request/Report into workflow and update your ticket with a comment that the issue is resolved.
   c. If the Financial Previewer is listed in the Approver ID, update the Approver ID to the Financial Approver (instead of the Financial Previewer) to set the correct approval workflow routing. Next, resubmit the Request/Report into workflow and update your ticket with a comment that the issue is resolved.

How the **Report Timeline** (workflow routing) looks when the Financial Previewer is selected in the **Approver ID** field instead of the Financial Approver. The workflow does not recognize both Jillian as the Financial Previewer AND Luis as the Financial Approver.	How the **Report Timeline** (workflow routing) looks when the Financial Approver is selected in the **Approver ID** field instead of the Financial Previewer. The workflow now recognizes both Jillian as the Financial Previewer AND Luis as the Financial Approver!
Report Timeline

June 25 - July 4 Food Expenses \| $1,017.80

Approval Flow

ERP Validation
System, Concur

Financial Previewer
Jones, Jillian B.

Financial Approval | Report Timeline

June 12-14 Food Expenses \| $589.29

Approval Flow

ERP Validation
System, Concur

Financial Previewer
Jones, Jillian B.

Financial Approval
Alvarez, Luis |

To confirm the changes are reflected in the Approval Flow, navigate to **Request/Report Details** > **Request/Report Timeline**.

Not Submitted \| Report Number: 019OXS

Report Details ⌄   Print/Share ⌄   Manage Receipt

Report
Report Header
Report Totals
Report Timeline
Audit Trail
Allocation Summary
Linked Add-ons
Manage Requests

Edit   Delete

Payment Type ⇅

Incurred by User

4. Create a **new** Request/Report header and complete all the required fields. Navigate to **Request/Report Details** > **Request/Report Timeline**.
   a. If the Approver ID is blank, please add to your ticket "*Created new Request/Report and do not see the Financial Approver name listed.*"
   b. If the Approver ID has the Financial Approver listed and it is a Request, add the desired estimated expenses and submit into workflow. Update your ticket status as resolved.
      i. Remember to delete the older Request to prevent confusion.
   c. If the Approver ID has the Financial Approver listed and it is a Report, you are able to select the **Copy Report** to add the expenses from the older Report to the newly created Report and submit into workflow. Update your ticket status as resolved.

i. Remember to delete the older Report to prevent confusion.

Delete Report   **Copy Report**   **Submit Report**

Copy Report   ✕

* Required field

New Report Name *

Copy: Test

Starting date for copied expenses. (Previous Date 08/04/2022) * ❓

07/20/2023

Quick Help   ✕

Enter a start date for the earliest expense
entry and all other entries will be adjusted
based on that new date.

Create New Report