Concur Expense: Workflow Email Notifications

Setup Guide

Last Revised: March 24, 2020

Applies to these SAP Concur solutions:

- ☒ Expense
  - ☒ Professional/Premium edition
  - ☐ Standard edition
- ☐ Travel
  - ☐ Professional/Premium edition
  - ☐ Standard edition
- ☐ Invoice
  - ☐ Professional/Premium edition
  - ☐ Standard edition
- ☐ Request
  - ☐ Professional/Premium edition
  - ☐ Standard edition

Table of Contents

Revision History

Date	Notes / Comments / Changes
January 7, 2021	Updated the copyright; added Concur to the cover page title; cover date not updated
April 9, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
March 24, 2020	Updated the *Variables for Expense Reports* table by adding four new tokens and removing eight unused tokens. Added: 1. %HasClearedExceptions% 2. %SubmittingUserEmail% 3. %ExpenseCount% 4. %ExpenseEntrySummary% Removed: 1. %FirstApprovalDate% 2. %ImageRequired% 3. %ReceiptsReceived% 4. %CtryCode% 5. %TotalPaidNonEmployee% 6. %TotalCopdPostedAmount% 7. %FirstSubmitDate% 8. %ReceiptImageAvail%
January 2, 2020	Updated the copyright; no other changes; cover date not updated
August 10, 2019	Added a Size Limitation section to the Overview section stating that limit for emails that use the SAP Concur notification service is 10MB. Outgoing emails that have attachments larger than 10MB are not delivered.
March 7, 2019	Removed the obsolete reference to "approval via email."
January 4, 2019	Updated the copyright; no other changes; cover date not updated
August 22, 2018	Updated the definitions for the **Report From** field variables in the *Variable for Expense Reports* section
April 4 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 9 2018	Updated the copyright; no other changes; cover date not updated
August 2 2017	Added a clarification note: Approval via email is not supported for Cost Object Approval and Budget Approval workflows.
January 24 2017	Added a mention that the ampersand symbol is not permitted in the Display as From field.
December 14 2016	Changed copyright and cover; no other content changes.
November 9 2016	Updated the guide content to new corporate style; no content changes.
May 13 2016	Updated instances of he/she to they.

Date	Notes / Comments / Changes
February 19 2015	Removed information about the current user interface; changed the copyright; no other content changes
January 16 2015	Added two new variables for email notification comments, and corrected descriptions for the functional behavior of two other notification variables
December 26 2014	Clarified information about Expiration Email to Approver; this email is sent to the *original* approver, not the *new* approver Clarified email timing Updated the screen shots to the enhanced UI and made general updates to the content Changed the copyright
September 24 2014	Added information about two user interfaces; no other content changes.
May 16 2014	Added variable for expired approval approver name.
April 15 2014	Changed copyright and cover; no other content changes
June 14 2013	Added information about using the Copy function to create new notifications that will display when selecting an email notification to send to the approver when a workflow step has expired
April 3 3012	Removed all references to the *legacy* Authorization Request feature in Concur Expense Changed any references to Concur's Travel Request service to Request, Concur Request, or Authorization Request, depending on the situation No other content changes
December 28 2012	Made rebranding and/or copyright changes; no content changes
June 22 2012	Addition of new Display as From configurable "From" address in email notifications.
February 2012	Changed copyright; no content change
February 25 2011	Workflow email notifications moved to the Workflows tool
December 31 2010	Updated the copyright and made rebranding changes; no content changes
July 16 2010	Corrected variable: **Company To Employee Amount** is now **Due Employee**.
April 16 2010	Clarified **Approval Status Set To** field
January 15 2010	Added information about courtesy email for default approvers
December 2009	Changed to stand-alone setup guide; no content change
November 13 2009	Added information about partial tag and editing email HTML code
October 16 2009	First publication

Workflow Email Notifications

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client Support.

Section 2: Overview

Types

The workflows feature generates email notifications when certain actions occur for expense reports and cash advances:

- **Status Change:** This notification is sent when the status of the report/ advance changes. The notification is sent to the user who originally submitted the report/advance.
- **Sent Back to Employee:** This notification is sent when the report/advance is sent back to the user who originally submitted it.
- **Approval Request:** This notification is sent to the approver when the report/advance is pending approval.

There is another notification that applies ***only*** to expense reports:

- **Courtesy Email:** This notification is sent to a user's default approver if that person is ***not*** the first approver in the workflow or if another approver was selected by the user for the first step in the workflow (if the company allows users to select approvers).

Timing

Workflow emails are sent immediately to the outbound email queue when the trigger occurs, for example, when the report is sent back to the user. The recipient generally receives the email within minutes.

The only reason that an email is delayed is if there are issues with the outgoing or incoming email systems.

Size Limitation

The limit for emails that use the SAP Concur notification service is 10MB. Outgoing emails that have attachments larger than 10MB are not delivered.

Section 3: Configuration

There are two steps to configuring email notifications:

- Add or modify the desired email notification.
- Choose the desired notification for the workflow.

Access the Email Notification Page

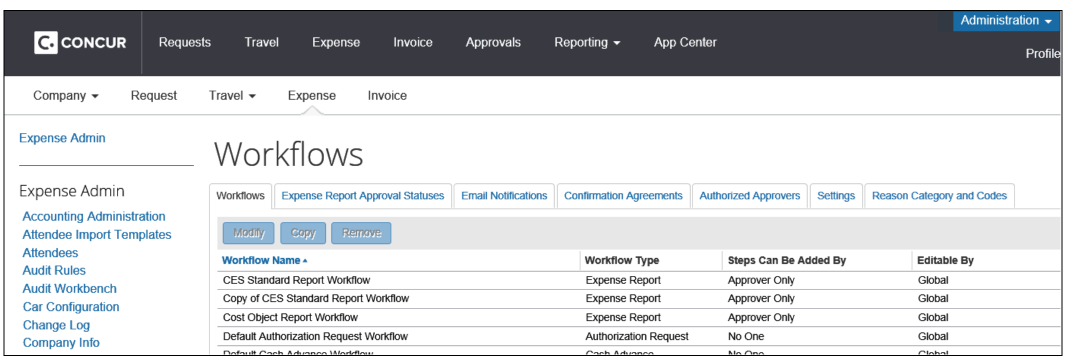
View and manage workflow emails on the **Email Notifications** page in Workflows.

To access the Email Notifications page:

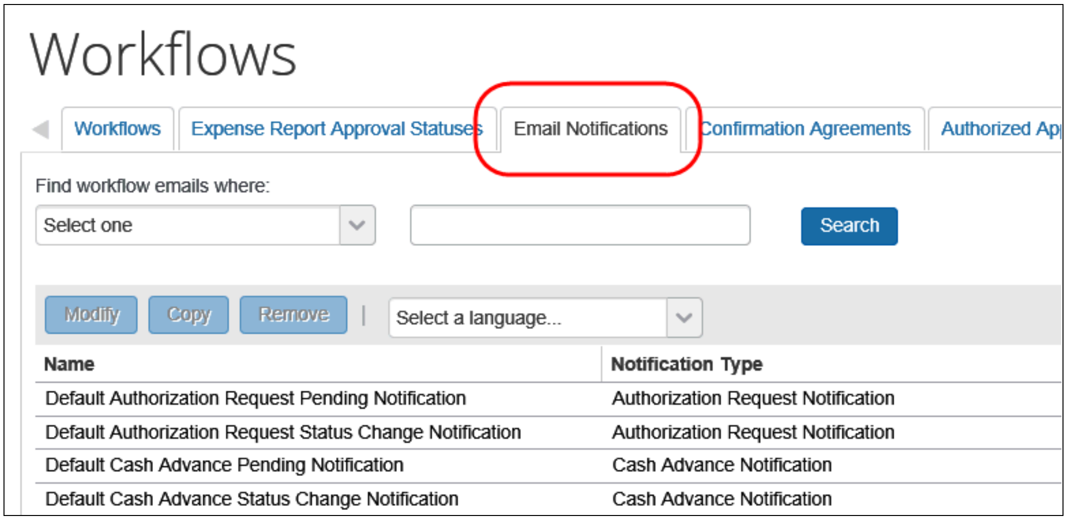
1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Workflows** (left menu). The **Workflows** page appears.



3. Click the **Email Notifications** tab.



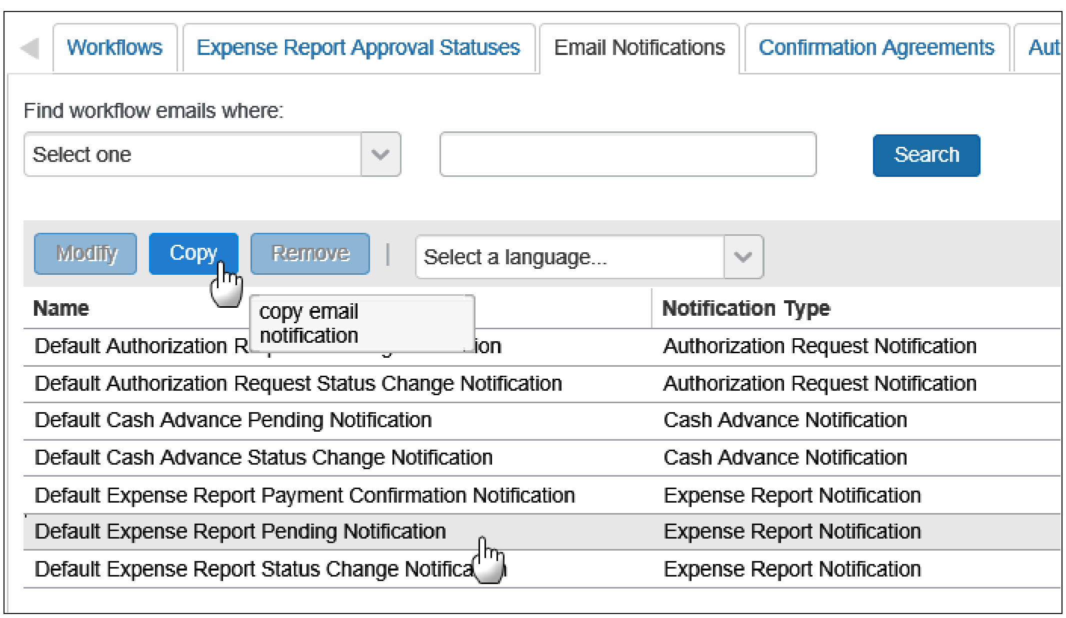
Step 1: Add, Modify, Remove an Email Notification

Add an Email Notification

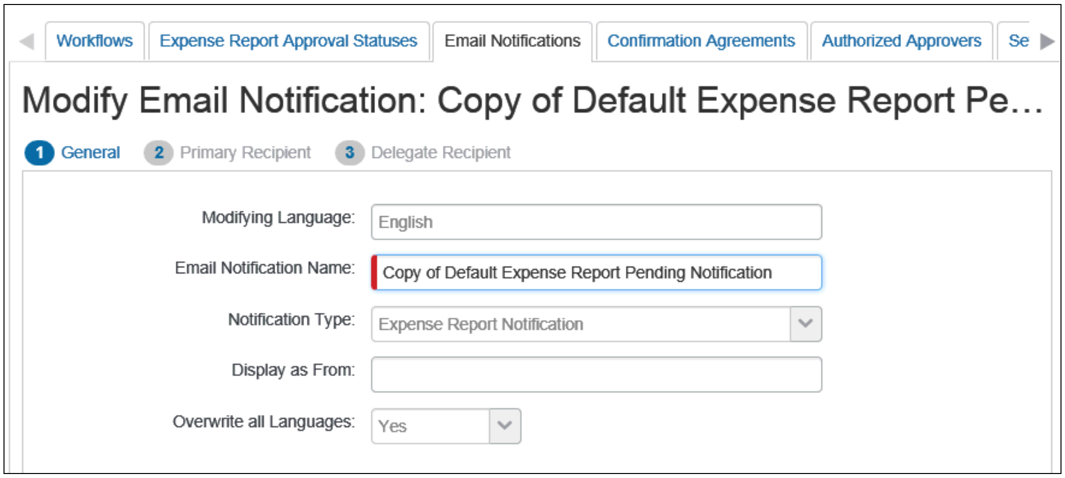
To add a new email notification, copy an existing notification and then edit the copy.

To add an email notification:

1. On the **Email Notifications** tab, click the desired notification.
2. Click **Copy**.



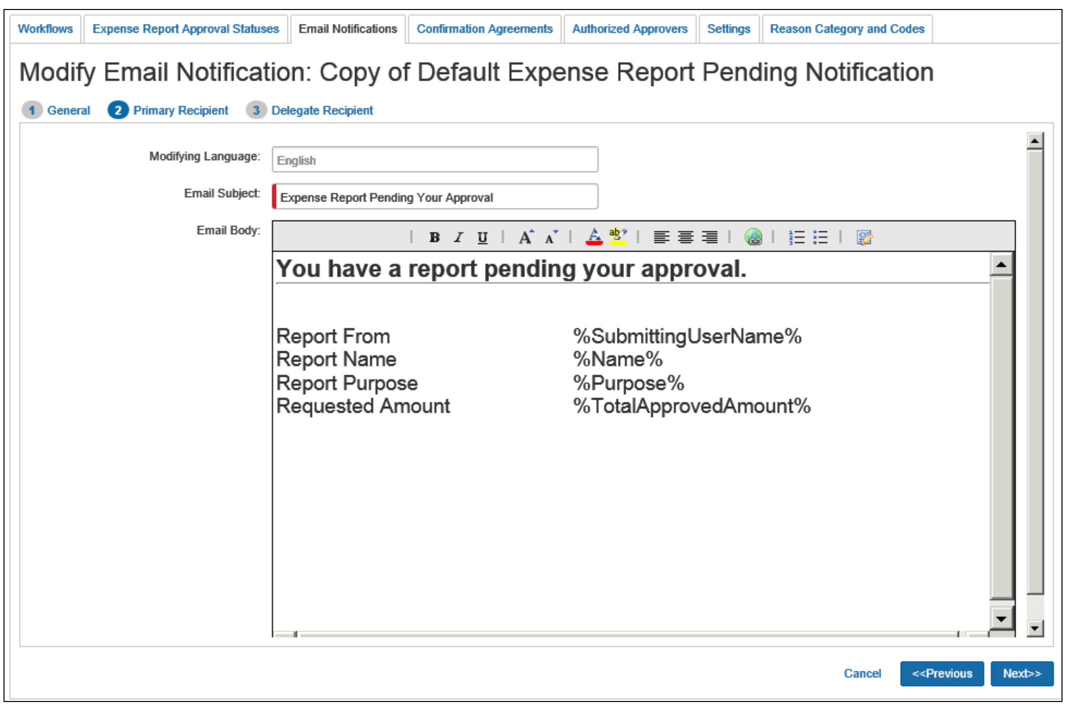
The **General** step of the **Modify Email Notification** window appears.



3. Make the desired changes.

   The only fields that can be edited at this time are **Email Notification Name** and **Display as From**. If you need to make changes to the other fields, save this copy and then edit it as detailed in *Modify an Email Notification* in this guide.

4. Click **Next**. The **Primary Recipient** step appears.



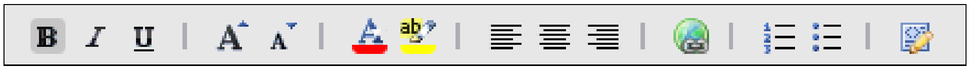
This information will be seen by the primary recipient (user and approver).

5. Make the desired changes to the **Email Subject** field. You can use "variable" fields to enter specific data in this field.

   Refer to *Available Data Variables* in this guide for more options.

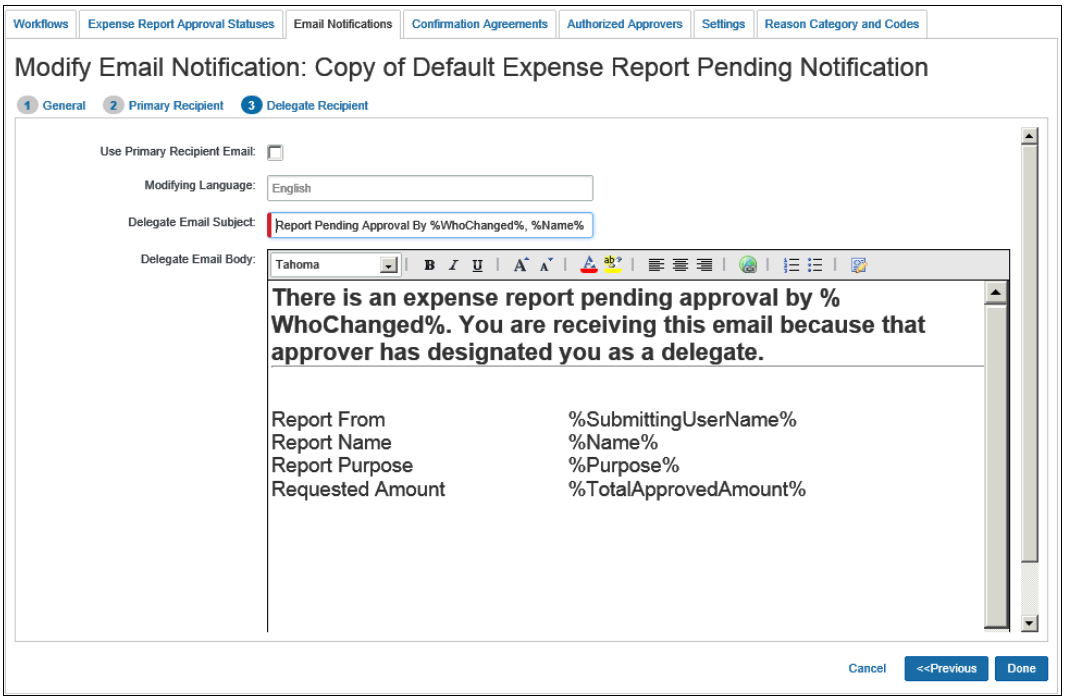
6. Make the desired changes to the **Email Body** field.
   - You can use "variable" fields to enter specific data in this field.

     Refer to *Available Data Variables* in this guide for more options.
   - Use the toolbar for bold, color, etc.



   - If you are familiar with HTML, you can also view the HTML code and edit it directly. To do so, click the **Source Edit** button at the right end of the toolbar.

7. Click **Next**. The **Delegate Recipient** step appears.



8. Make the desired changes to the **Email Subject** field. You can use "variable" fields to enter specific data in this field.

   Refer to *Available Data Variables* in this guide for more options.

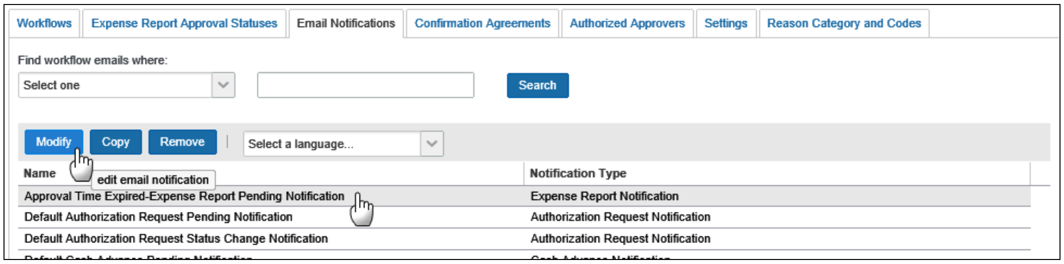
9. Either:
   - If you want the primary recipient email and the delegate email to be the same, select the **Use Primary Recipient Email** check box.
   - If not, make the desired changes to the **Email Body** field. The variable fields and the HTML work the same way is in the primary recipient email.

10. Click **Done**.

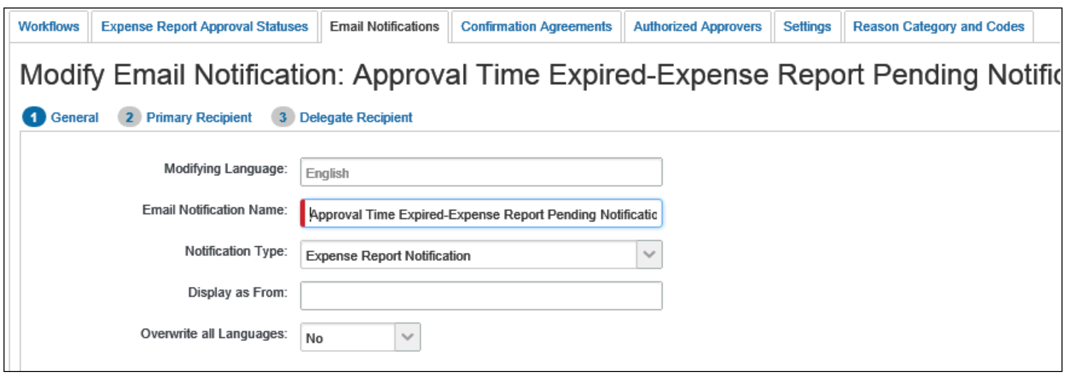
Modify an Email Notification

To modify an email notification:

1. On the **Email Notifications** tab, click the desired notification.



2. Click **Modify**. The **General** step of the **Modify Email Notification** window appears.



3. Make the desired changes.

Field	Description
Email Notification Name	The name of the email notification. This name will appear in the email notification list while editing the workflow.
Notification Type	Select the desired notification type: • Cash Advance Notification • Expense Report Notification
Display as From	Type the email address you would like the recipient to see when they receive the notification. This address can be used by the recipient to set mailbox rules that prevent automatic spam disposal or allow routing of the email to a designated folder or Forward action. The @ symbol is not permitted in this name.

Field	Description
Overwrite all Languages	Click *Yes* if you would like to apply the new text to all languages. Click *No* to make changes only for the selected language. **NOTE:** If creating a new email or making major changes to an existing one, it may be desirable to overwrite the other languages with the new edits. Once the changes are complete, go into each language and edit the text portion of the email to the correct language.

4. Click **Next** to access the following steps. Make changes as necessary.

   Refer to the *Add a New Notification* section of this guide for field details.

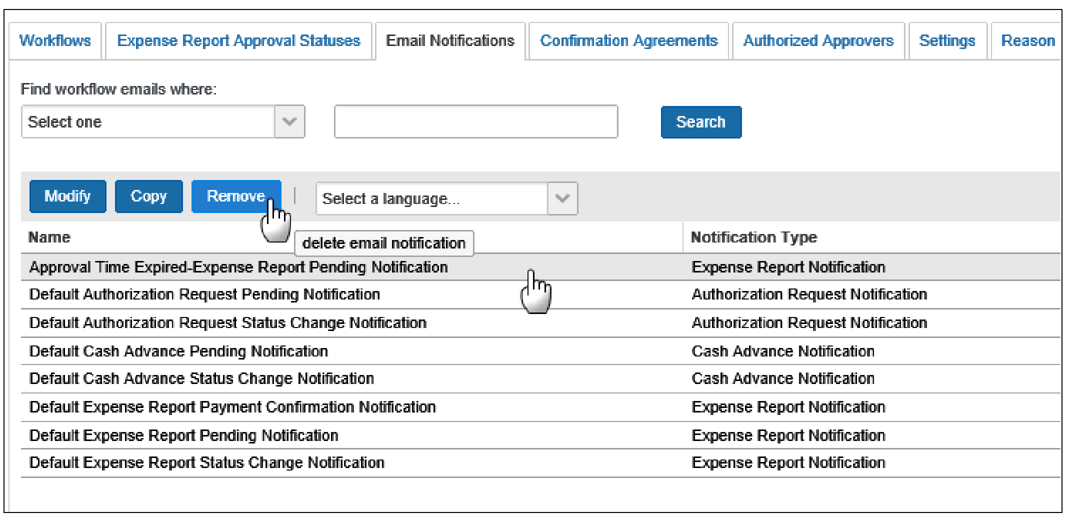
5. Click **Save**.

Remove an Email Notification

You can remove email notifications that are no longer needed and are not in use. Default emails provided by Concur cannot be removed.

To remove an email notification:

1. On the **Email Notifications** tab, click the desired notification.



2. Click **Remove**. The email notification is deleted.

Step 2: Choose an Email Notification in Workflow

Once the email is created, the administrator selects the appropriate email in the workflow properties.

To choose the email notification in workflow:

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

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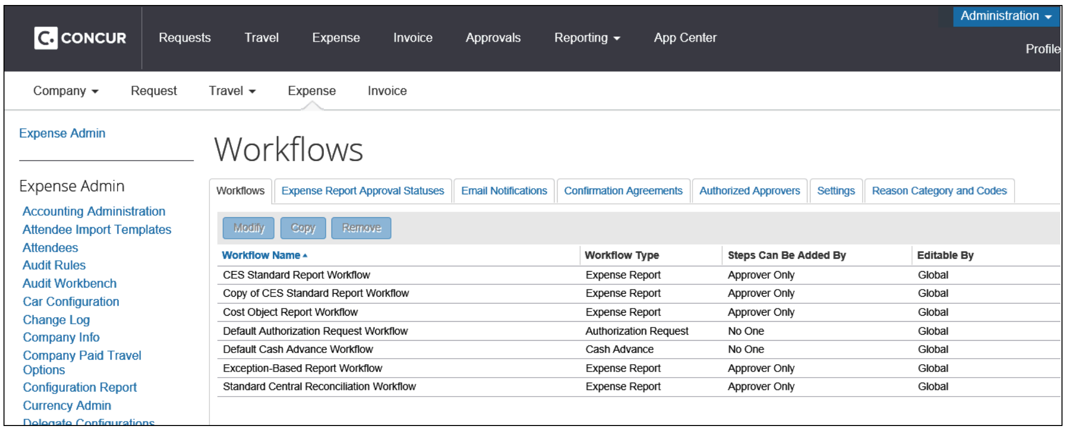
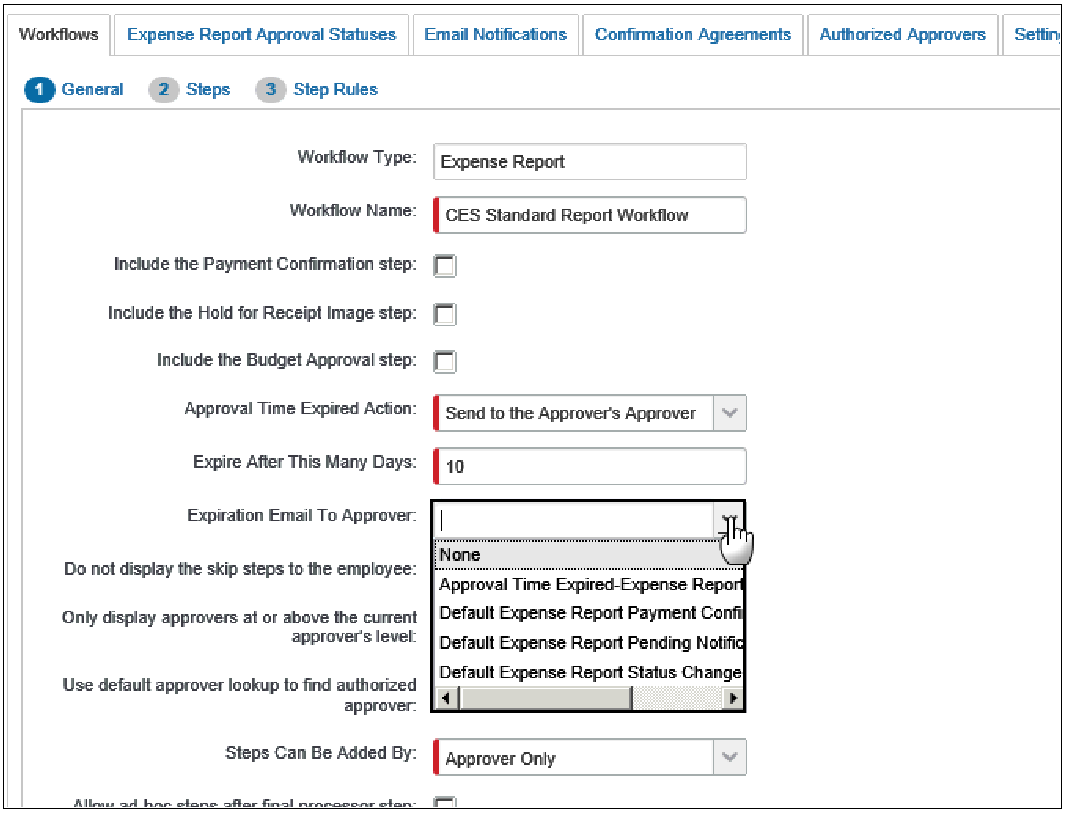
2. Click **Workflows** (left menu). The **Workflows** page appears.



3. On the **Workflows** tab, either:
   - Select the desired workflow and click **Modify**.
     – or –
   - Double-click the desired workflow.

The **General** page appears.



4. Select the desired notifications.

Field	Description
Expiration Email To Approver	This notification is sent if the workflow is configured to send the report to another approver when the approval time expires. The *original* approver receives this email.
Approval Request Notification	This notification is sent to the approver when the report/ advance is submitted by the employee.
Status Change Notification	This notification is sent to the submitter when the workflow status of the report/advance changes.
Sent Back Notification	This notification is sent to the submitter when the report/ advance is sent back to them. If the report was submitted by a delegate, that delegate also receives this notification. **NOTE:** This notification is always sent; it is not configurable based on the user Profile preferences.
Courtesy Email Notification *(expense reports only)*	This notification is sent to a user's default approver if that person is ***not*** the first approver in the workflow or if another approver was selected by the user for the first step in the workflow (if the company allows users to select approvers).

5. Click **Done**.

Section 4: Available Data Variables

General Information

Data from the report or advance can be added to the email subject or body text, using data variables. These variables are placeholders that will be updated with the actual data when the email is sent. The variables are enclosed in percentage signs, which indicate to the system that they need to be replaced.

The variables can be used to insert the field label or the field value in the email. Adding an "L" (L) and underscore (_) to the beginning of the variable name tells the system to replace that variable with the field label. Variables without the L and underscore are replaced with the field value. Certain fields will use the company-specific form field label (if available) instead of the default label.

Example:

The administrator would like the email to display the report name, in the following format:

Report Name: Trip to New York

The administrator can enter this information two ways:

- **Using variables for the label and the data:** The administrator enters the following line of text in the email editor to use the label configured for the field on the form definition applicable to the report. Cash advances would use the label displayed on the user entry page.

  %L_Name%: %Name%

  NOTE: If the variable is blank, then both label and value variables will not print in the resulting email.

- **Using text for the label and a variable for the data:** The administrator enters the following line of text in the email editor.

  Report Name: %Name%

Display Text on Partial Approvals

The Expense Report Status Change email can show specific data only when the report is partially approved. This feature is used by adding the partial tag to the email text, while in the HTML code view. All text between the opening and closing tags will be displayed only if the report was partially approved.

NOTE: This feature requires understanding of HTML code structure. If you choose not to use this feature, information about partial approvals will not be included in your custom email notifications. The default emails will continue to include special text in the case of a partial approval.

Example:

The administrator would like to display the following message text when the report has been partially approved: "This report has been partially approved by: approver"

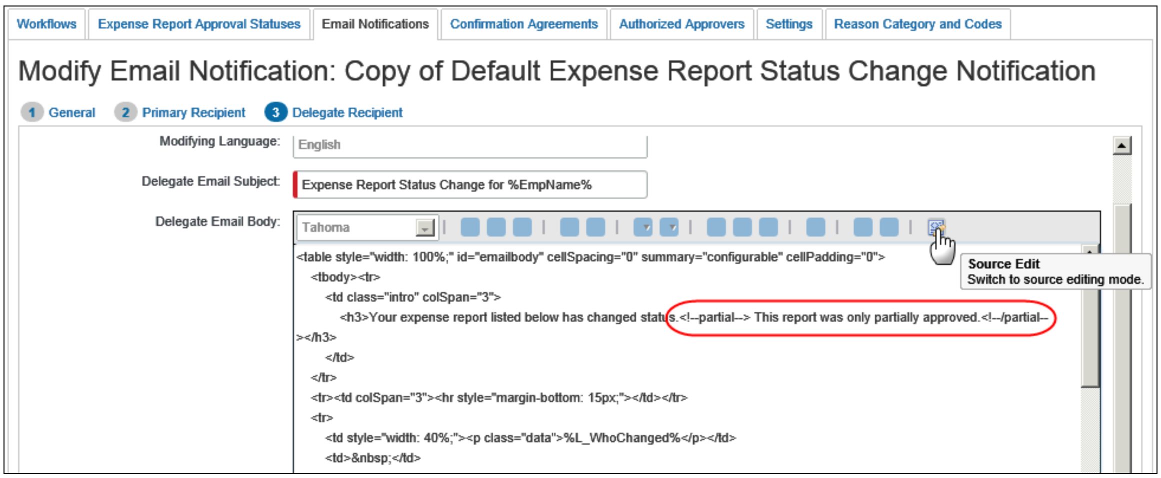
The administrator would enter the following text in the email editor while in HTML code view:

<!--partial-->

This report has been partially approved by: %WhoChanged%

<!--/partial-->

The partial tags are included in the standard emails, and can be viewed in the HTML (by clicking the **Source Edit** button):



Variables for Expense Reports

Expense Reports		
Field	**Variable**	**Description**
Amount Claimed	Field Label: %L_TotalClaimedAmount% Field Value: %TotalClaimedAmount%	The total amount claimed
Approval Status Set To	Field Label: %L_StatusName% Field Value: %StatusName%	Status result from current workflow step actions
Approver's Comments	Field Label: %L_ApprovalComment% Field Value: %ApprovalComment%	Comments entered on the report by the approver
CA Returns Amount*	Field Label: %L_CaReturnsAmount% Field Value: %CaReturnsAmount%	The Cash Advance amount that is returned to the company

Expense Reports		
Field	**Variable**	**Description**
CA Utilized Amount*	Field Label: %L_CaUtilizedAmount% Field Value: %CaUtilizedAmount%	The Cash Advance amount that was utilized on this report
Changed By	Field Label: %L_WhoChanged% Field Value: %WhoChanged%	Employee name from workflow step
Cleared Exception Count*	Field Label: %L_ExceptionCount% Field Value: %ExceptionCount%	The total count of cleared exceptions on the report
Comment Count	Field Label: %L_CommentCount% Field Value: %CommentCount%	Count of comments associated with the current workflow step
Comment History	Field Label: %L_CommentHistory% Field Value: %CommentHistory%	All distinct comments on the report since its creation, in reverse chronological order
Comment History Count	Field Label: %L_CommentHistoryCount% Field Value: %CommentHistoryCount%	Count of all distinct comments on the report since its creation
Comments	Field Label: %L_ReportComments% Field Value: %ReportComments%	Comments associated with the current workflow step
Company To Credit Cards Amount*	Field Label: %L_CompanyToCreditCardsAmount% Field Value: %CompanyToCreditCardsAmount%	The amount on the report that will be paid to the credit card from the company
Custom 1-20*	Field Label: %L_CustomXX% Field Value: %CustomXX%	The value in the custom fields. Replace XX with the field number
Delegate Approved*	Field Label: %L_DelegateApproved% Field Value: %DelegateApproved%	Yes/No indicating whether the report was approved by a delegate
Delegate Submitted*	Field Label: %L_DelegateSubmitted% Field Value: %DelegateSubmitted%	Yes/No indicating whether the report was submitted by a delegate
Due Employee*	Field Label: %L_DueEmployee% Field Value: %DueEmployee%	The amount on the report that will be paid to the employee from the company
Ever Sent Back*	Field Label: %L_EverSentBack% Field Value: %EverSentBack%	Whether the report has ever been sent back to the employee

Expense Reports		
Field	**Variable**	**Description**
Exception Count*	Field Label: %L_ClearedExceptionCount% Field Value: %ClearedExceptionCount%	The total count of exceptions on the report
Exception Level Max*	Field Label: %L_ExceptionMaxLevel% Field Value: %ExceptionMaxLevel%	The maximum exception level reached by the report
Exception Level Total*	Field Value: %ExceptionLevelTotal%	The total exception level of the report
Expense Count	Field Label: %L_ExpenseCount% Field Value: %ExpenseCount%	The number of expenses on the report
Expense Entry	Field Label: %L_ExpenseEntrySummary% Field Value: %ExpenseEntrySummary%	The list of expense entries on the report
Expired Approver Name	Field Label: %L_ExpiredApproverName% Field Value: %ExpiredApproverName%	The name of the previous approver whose approval window expired without them taking action.
Has Cleared Exceptions	Field Label: %L_HasClearedExceptions% Field Value: %HasClearedExceptions%	Whether the report has any cleared exceptions
Limit Approved*	Field Label: %L_LimitApproved% Field Value: %LimitApproved%	Whether the report was limit approved (authorized approver or cost object approver workflows)
Org Unit 1-6*	Field Label: %L_OrgUnitXX% Field Value: %OrgUnitXX%	The organizational unit field values. Replace XX with the field number
Payment Status Set To	Field Label: %L_PayStatus% Field Value: %PayStatus%	Report payment status
Receipt Required*	Field Label: %L_ReceiptRequired% Field Value: %ReceiptRequired%	Whether a receipt is required
Report Date	Field Label: %L_CreationDate% Field Value: %CreationDate%	The date the report was created
Report From	Field Label: %L_EmpName% Field Value: %EmpName%	Employee name (owner of the expense report)

Expense Reports		
Field	**Variable**	**Description**
Report From	Field Label: %L_SubmittingUserName% Field Value: %SubmittingUserName%	User who submitted the expense report (employee or delegate)
Report ID*	Field Label: %L_ReportId% Field Value: %ReportId%	The report unique identifier
Report Name*	Field Label: %L_Name% Field Value: %Name%	Name of the report
Requested Amount	Field Label: %L_TotalApprovedAmount% Field Value: %TotalApprovedAmount%	The approved amount
Submit Date	Field Label: %L_SubmitDate% Field Value: %SubmitDate%	The date the report was submitted
Submitting User Email	Field Label: %L_SubmittingUserEmail% Field Value: %SubmittingUserEmail%	The email of the user (employee or delegate) who submitted the expense report
Total Paid Employee*	Field Label: %L_TotalPaidEmployee% Field Value: %TotalPaidEmployee%	The total report amount paid to the employee
Total Personal Amount*	Field Label: %L_TotalPersonalAmount% Field Value: %TotalPersonalAmount%	The total personal amount on the report
Total Posted Amount*	Field Label: %L_TotalPostedAmount% Field Value: %TotalPostedAmount%	The total amount posted for the report
User Defined Date*	Field Label: %L_UserDefinedDate% Field Value: %UserDefinedDate%	The date the user selected in the report header
*These fields use the configured form field label, if available, instead of the default label.		

Variables for Cash Advances

Cash Advance Requests		
Field	**Variable**	**Description**
Amount Requested	Field Label: %L_RequestAmount% Field Value: %RequestAmount%	The total amount requested
Approval Status Set To	Field Label: %L_StatusName% Field Value: %StatusName%	Status result from current workflow step actions
Approver’s Comments	Field Label: %L_ApprovalComment% Field Value: %ApprovalComment%	The approver’s comment on the request

Cash Advance Requests		
Field	**Variable**	**Description**
Cash Advance Name	Field Label: %L_Name% Field Value: %Name%	Name of the request
Changed By	Field Label: %L_WhoChanged% Field Value: %WhoChanged%	Employee name from workflow step
Comment	Field Label: %L_Comment% Field Value: %Comment%	The most recent comment on the request
Employee Name	Field Label: %L_EmpName% Field Value: %EmpName%	The employee that submitted the request
Request Date	Field Label: %L_RequestDate% Field Value: %RequestDate%	The date indicated on the request