Shared: User Administration

User Guide

Last Revised: October 14, 2023

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

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Revision History

Date	Notes/Comments/Changes
October 14, 2023	In the *Available Permissions and Roles > Expense Tab* section, added the Integration Manager roles. The Integration Manager roles are associated with the Funds and Grants Integration with Concur Solutions.
October 6, 2023	Removed **Verify Events Auditor** role from the *Expense Tab* table under *Section 3: Available Permissions and Roles*.
June 17, 2023	Added the Payment Release Manager role to *Available Permissions and Roles > Invoice Tab* section.
March 6, 2023	Updated description for Verify Events Auditor role under the Expense Tab section.
November 28, 2022	Updated *Travel Tab* topic under *Available Permissions and Roles* section
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
May 26, 2021	Added Authentication Administration to the list of tools a Company Administrator has access to.
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
April 5, 2021	Updated definition for *Password and Verify Password* under *Adding New Users* topic of the *User Administration Page* section
March 23, 2021	Updated *User Administration Page* section with updated definition for Password and Verify Password general setting
March 19, 2021	Updated *Available Permissions and Roles* section with three new roles for the Expense tab
February 11, 2021	Removed mention of the Taxability and Deductibility Calculation Service from the description of the Expense Configuration Administrator (Restricted) role until the service is more widely available.
July 31, 2020	Added the Payroll Administrator role under the Expense Tab section.
May 1, 2020	Added "delete" to what users with the Invoice AP user role can do.
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
December 7, 2019	Removed reference(s) to legacy Budget Insight feature. Clients who want to use budget functionality are recommended to implement the new Budget product that SAP Concur released last year. Also changed all "Concur Insight (formerly Analysis/Intelligence)" references to "Analysis/Intelligence", and references to "Concur Insight Essentials (formerly Analysis)" to "Analysis".
November 14, 2019	Clarify that Role Administrator may perform the Assign action from the **Reporting** tab as well as all other tabs.

Date	Notes/Comments/Changes
October 8, 2019	Updated the description of the Invoice AP User in the table on page 28.
September 16, 2019	Changed the definition for the Role Builder role
August 29, 2019	Clarified some of the roles and permissions.
July 9, 2019	Updated the description of the Invoice Processor in the table.
June 12, 2019	Replaced an instance of “Invoice Intelligent Capture Verifier” with “Client Managed Capture Verifier”.
May 6, 2019	Updated user role information in the Travel Tab table.
April 2, 2019	Changed the term "request" to "invoice" where applicable.
March 21, 2019	Added expense type to Invoice Configuration Administrator (Restricted) role.
March 4, 2019	Added a note to: • The **Reporting** tab, Dashboard User - do not use • About Expense-only uses have an abbreviated profile; no work or home address Removed references to these reports; they are no longer available: • User Profile Changes Version 1 • User Preference Changes Version 1
February 19, 2019	Added Central Receiver role to Invoice table. Updated ‘payment request’ to ‘invoice’. Update Concur to SAP Concur and Sap Concur’s with ‘the SAP Concur’. Replaced images with old Concur logos.
February 12, 2019	Updated the copyright; no other changes; cover date not updated
September 22, 2018	Added a new procedure, *Update Default Language*, to the *Modifying Existing Users* section.
September 14, 2018	The September release has moved to September 22, 2018.
September 15, 2018	Added the new role Digital Compliance Administrator. Updated the roles that have access to Locations: Shared Configuration Administrator (restricted) and Request Configuration Administrator (restricted).
May 31, 2018	Updated the definition for the Web Services Administrator and Company Administration user roles.
May 29, 2018	Added information for these permissions: • User Admin (Read Only) • Virtual Payment Administrator
May 12, 2018	Updated the Budget Approver role name to Budget Approver/Manager for Expense and Invoice. Added Receipt User to the Invoice roles table. Added the Data Retention permission to the tables for the Travel tab, Expense tab, Request tab, and Invoice tab.
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated

Date	Notes/Comments/Changes
March 22, 2018	Added information about Budget roles.
February 23, 2018	Added notes about unique logion names. Removed information about Locate & Alert.
February 10, 2018	Added Data Retention Administrator to the list of Expense permissions, and updated guide name in reference to the *Shared: Employee Import Specification* guide.
January 25, 2018	Updated the copyright; no other changes; cover date not updated
December 18, 2017	Added Data Retention Administrator to the list of Travel permissions
November 4, 2017	Added new bullet for the Taxability and Deductibility Calculation Service to the description for Expense Configuration Administrator, restricted and non-restricted roles.
August 21, 2017	In roles, moved *Corporate Ghost Cards* from Travel Policy Administrator to Company Administration
June 19, 2017	Clarified Travel permissions
May 8, 2017	Clarified the Company Info Administrator role
February 17, 2017	Added information about the Invoice Processor role.
February 6, 2017	Added the Virtual Payment Administrator permission for Travel – do not use; feature not yet activated
December 15, 2016	Changed copyright and cover; no other content changes.
October 28, 2016	Updated the guide content to new corporate style; no content changes.
Older revision history has been removed.	

User Administration

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

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 SAP Concur administrator.

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

Section 2: Overview

The user administration section of Company Administration is used by Travel, Expense, Invoice, and Request administrators to add new users and modify user profiles. The user administration page contains the fields used on the Employee Profile form in Expense and/or the Travel Preferences fields from Travel. The fields displayed will vary depending on the user role selected for the new user.

NOTE: The User administrator can be restricted from editing their own user profile. To enable this setting, contact SAP Concur support to have the appropriate module property updated.

The User Permissions functionality allows administrators to assign Travel, Expense, Invoice, Analysis/Intelligence, and Request user roles. This feature is available to users with the Role Administrator Expense role or Permissions Administrator or Company Administrator (Travel) roles.

NOTE: This guide covers the functionality of the User Administration – **Add a User** and **User Permissions** links. For information on the other links under User Administration, refer to the *Concur Travel: Company Administration User Guide*.

User Administration in Travel, Expense, Invoice, and Request

Administering users can now be controlled by the *type* of user, allowing for administrators that can access only Travel users, and administrators that can access only Expense, Invoice, or Request users.

NOTE: This feature does ***not*** prevent the client from administrating all types of users at one time under a single role; instead this feature provides an *additional* method of dividing the responsibility of administering users.

User Administration Related Roles and Access

The user assigned the Employee Administrator role has access to the **User Administration** menu and access to the Expense, Invoice, and Request-related users and functions:

- Expense/Invoice/Request user search
- Expense/Invoice/Request User role check boxes*
- Expense/Invoice/Request Approver role check boxes*
- Expense/Invoice/Request Settings
- Primary fields on the user details page
- Can view users from their assigned employee groups and employee group configurations when using the Expense Advanced Filters
- Can view and optionally edit and register a car on behalf of a user
- Can be restricted to read-only access for auditing purposes

  * Check boxes can be removed from display to prevent assignment by the role – refer to *Suppressing Assignment of Roles Using Role Check Boxes in User Details* in this document for more information.

The user assigned the User Administration role has access to the **User Administration** menu and access to the Travel-related functions:

- Travel user search
- Travel Wizard User role check box
- Travel Settings
- Primary fields on the user details page
- Can view users from all groups unless the Divisional View setting restricts them to only employees in groups they are a member of
- Can be restricted to read-only access for auditing purposes

TIP: Provide *both* the Employee Administrator and the User Administration roles for administrators that need access to Travel, Expense, Request, and/or Invoice users.

ROLE HIERARCHY

The various user administration roles have greater and lesser amounts of control over user accounts. If a user is assigned more than one user administration role, the role with the highest amount of control determines the user's access, and the lower roles are not applied.

The user administration role hierarchy, from greatest control to least, is:

1. User Administration/Employee Administrator
2. Employee Maintenance
3. User Admin (read only)/Employee Administrator (Read only)
4. Password Administrator

Role Assignment: Access and Related Product Assignments

When assigning either the Role Administrator or Permissions Administrator roles, keep in mind the following logic used by the system to assign the role within other modules as well.

- **Role Administrator:** A user with the Role Administrator role has access to the **User Permissions** menu and access to the **Expense**, **Invoice**, **Request**, and **Reporting** tabs.
  - **ASSIGN:** Assign from the **Expense**, **Invoice**, **Request** or **Reporting** tab. Assigns Role Administrator to the specified user, and additionally assigns the Permissions Administrator role under Travel.
  - **REMOVE:** Remove from the **Expense**, **Invoice**, or **Request** tab. Removes the role from all excepting the Permissions Administrator role under Travel.
- **Permissions Administrator:** A user with the Permissions Administrator role has access to the **User Permissions** menu and access to the **Travel** tab.
  - **ASSIGN:** Assign from the **Travel** tab. Assigns Permissions Administrator to the specified user, Travel only.
  - **REMOVE:** Remove from the **Travel** tab. Removes Permissions Administrator from the specified user, Travel only.

TIP: Provide *both* the Employee Administrator and the User Administration roles for administrators that need access to Travel, Expense, Request, and/or Invoice users.

Segregating the User Administration Duties

Best Practice for user security is to segregate the duties for:

- Creating users
- Assigning roles to users
- Maintaining user roles and preferences

- Auditing records under read-only roles

! **IMPORTANT:** An administrator should ***not*** be able to create a user ***and*** assign the extended user roles. The basic user roles (Expense User, Invoice User, etc.) can be assigned on the user details page by the Employee/User Administrator.

These roles allow segregation of these duties:

- **Employee Administrator/User Admin:** Provides access to the User Administration function. The user can assign only the basic user roles (Expense User, Travel User), using the check boxes in the user details page that appears when you open a user for administration.

  TIP: You can have these check boxes removed from display, preventing assignment of these roles – see *Suppressing Assignment of Roles Using Role Check Boxes in User Details* in this document for more information.
- **Role Administrator/Permission Admin:** Provides access to the User Permissions function.
- **User Maintenance/Employee Maintenance** (Travel and all else, respectively)**:** Provides access to the User Permissions function, but without the ability to create a new user account.

Two Frameworks for User Permissions

How user permissions are named and managed depends on the module:

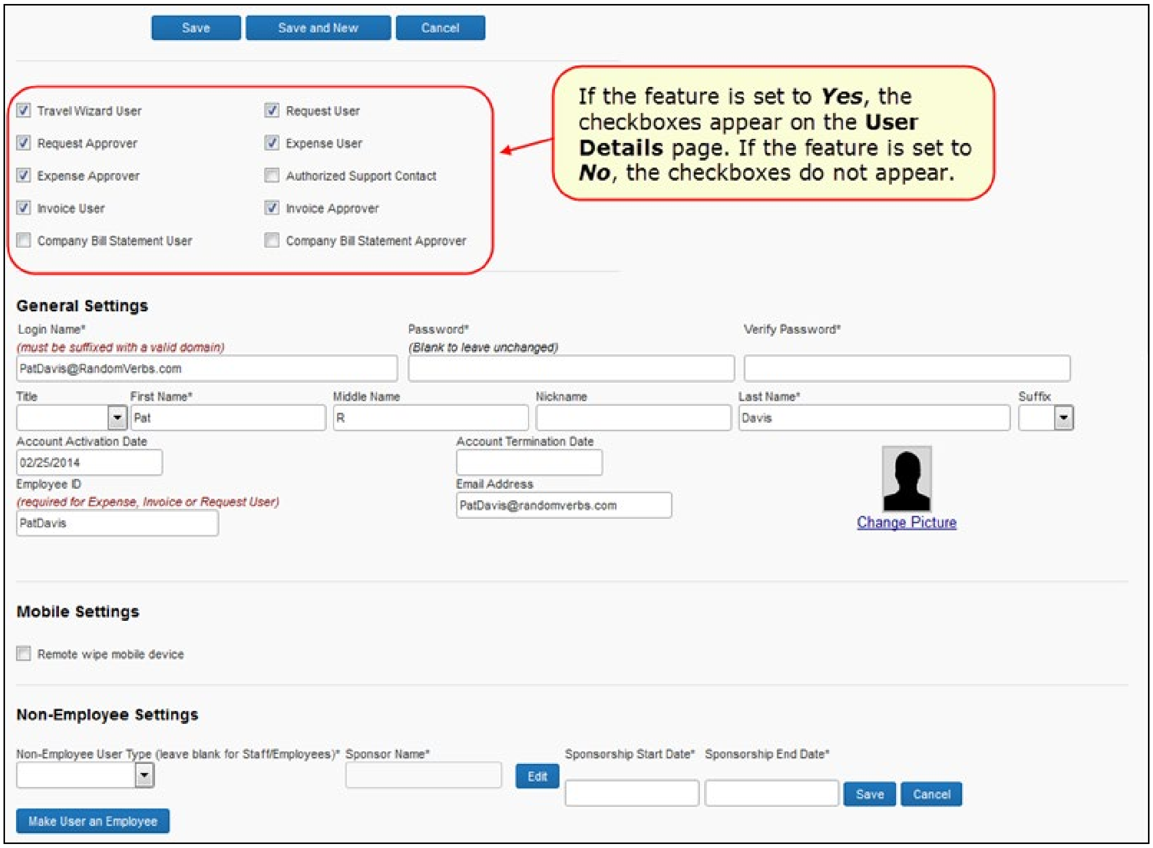
- **Permissions:** Travel and Meeting related roles are called *permissions* and are managed from the **Travel** tab in the user permissions section.

- **Roles:** Expense, Invoice, Analysis/Intelligence, and Request-related roles are called *roles* and are managed from the **Expense**, **Invoice**, **Request**, **Reporting** tabs in the user permissions section.

Suppressing Assignment of Roles Using Role Check Boxes in User Details

The user assignment check boxes can be removed from display to allow tighter security control of role assignment, preventing a scenario where approval of a substantial amount via a purchase order or expense is granted by way of role assignment with intent to defraud.

The feature works by suppressing the display of the check boxes. To do this, contact SAP Concur support, requesting that the **Allow User Admin to Add/Update Expense & Invoice Roles** Console (HMC) setting be set to *No*.



Two Methods of Managing Roles in User Permissions

Roles can be managed by two different methods:

- **By User Name:** The administrator searches for the desired user, then selects the user and the roles to assign.
- **By Role:** The administrator searches for the desired role, then selects the users to assign the role to.

The interface in the user permissions section changes depending on the method selected. However, it always contains the following elements:

- Method selection box
- Search area
- User/Role selection box
- Dual lists of roles or users
- Group area

The Password Manager Roles

Some clients need a user role that can update user passwords but does not have other user administration access. To answer this need, two standard roles are available, both called Password Manager. One role is available to clients with Travel, and one is available to clients with Expense/Invoice/Request.

Clients with Travel and either Expense/Invoice/Request can choose how to limit access to users by assigning one or both roles:

- The role on the **Travel** tab in the user permissions section will grant access to the users with the Travel feature enabled. If the Travel settings are set to use Divisional Access, the user will only be able to view and update users in their divisions.
- The role on the **Expense**, **Invoice**, or **Request** tab in the user permissions section will grant access to the users with Expense, Invoice, or Request enabled. The administrator can select the Expense or Invoice groups (Request uses Expense groups) the user has access to when assigning the role.
- If both roles are assigned, the user will be able to view and update users that match their Travel divisional access (if enabled) and selected Expense or Invoice group (Request uses Expense groups).

NOTE: The users with Travel and either Expense/Invoice/Request have one password for all applications. When any of the Password Manager roles changes a password, it changes for all applications.

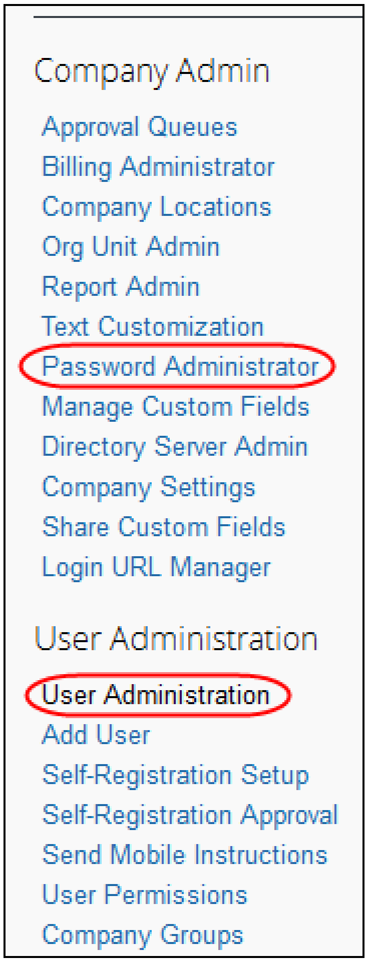
Users with these roles will see the **Password Manager** link on the **Company Administrator** page. These roles have the following access in Password Manager:

- User search functionality found in the user administration section
- Modify access to the Password fields on the user details page
- Read-only access to the Title, First Name, Middle Name, Nickname, Last Name, Suffix, and Email fields on the user details page

All other fields on the user details page are hidden.

Suppressing Access to the Password Function

A module property is available that can prevent any password changes within SAP Concur. If the property setting is ON, all password fields in Company Admin (User Administration or Password Administrator) become non-editable (deactivated):



When a new user is added – either via the import or when manually added by the User Admin – the system provides a randomly generated 20-character password.

This feature will be helpful for customers using Single Sign On (SSO). In most cases, the user will not know their password and the client site will not want any administrator to have the ability to change the random password. Used in conjunction with the existing setting for removing password access from users, this can completely block sign on outside of the SSO validation.

Section 3: Available Permissions and Roles

The following lists contain the available permissions and roles for Expense, Invoice, Travel, and Analysis/Intelligence. The roles are separated into tables based on the tabs in User Permissions.

Travel Tab

None of the Travel permissions are assigned along with a group.

<table>
<tr><th colspan="2">Travel Tab</th></tr>
<tr><th>Permission</th><th>Description</th></tr>
<tr><td>App Center Listing Administrator</td><td>The user assigned this role can submit App Center listings. This role is only assigned by SAP Concur to certain App Center partners.</td></tr>
<tr><td>Administer Approval Queue</td><td>The user assigned this role can reassign approval requests.
You can assign this permission by itself.</td></tr>
<tr><td>Agency Billing Administrator</td><td>Allows users to access agency billing administration</td></tr>
<tr><td>Billing Administrator</td><td>The user assigned this role can view bills from SAP Concur.
You must assign this permission with one other administration permission.</td></tr>
<tr><td>Company Administration</td><td>The user assigned this role can access:
Administer Approval Queue
Authentication Administration
Billing Administrator
Company Locations Administration
Corporate Ghost Cards
Group and Shared Resources Administration
Managed Meeting Center Admin (ONLY if the Third Party Meeting Module has been enabled)
Organization Unit Administration
Permission Administrator
Risk Management Admin (Used with Concur Risk Management)
Travel Policy Administrator
User Administration
The Manage User Apps page to restrict the User applications in the SAP Concur App Center for their company's users. This user can also enable Enterprise partner applications within the SAP Concur App Center.
For more information, refer to the Shared: App Center Administrator User Guide.
NOTE: When you also select the User Administration permission, the User Permissions link becomes available in Company Administration.</td></tr>
</table>

Travel Tab	
Permission	**Description**
Company Discount Administrator	The user assigned this role can add Travel site-level discounts. This feature is available to the user when you select this permission and the **Allow Discount Editing** option has been enabled in the Company Travel Configuration for the customer site. 📖 Refer to the *Discounts Travel Service Guide*. This permission must be combined with the Travel Policy Administrator permission.
Company Link Administrator	The user assigned this role can include/exclude links, redirect links, and add new links to the Travel Tools page 📖 Refer to the *Company Link Administrator Travel Service Guide*.
Company Locations and Maps	The user assigned this role can enter locations for travelers to use when searching for hotels or off-airport car locations.
Concur Meeting Accountant	The user assigned this role can add credit cards to a meeting and download payment files. **NOTE:** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.
Concur Meeting Admin	The user assigned this role can access Concur Meeting administration ***with*** the SAP Concur registration module **NOTE:** This permission will appear only if you have enabled Meeting via the new site setup work order.
Concur Meeting Planner	Allows user to access ***all*** Meeting pages ***except***: • Travel > Agency Settings • Travel > Form of Payment • Tracking > Payment (the **Edit** link is hidden from within the Payment page)

Travel Tab	
Permission	**Description**
Corporate Ghost Card Administrator	The user assigned this role can access to the **Corporate Ghost Cards** link on the **Company Admin** page. **NOTE:** The **Company Groups** link and the links in the **Group Administration** section are always present for anyone with administrative privileges, but users can only edit (not add) groups they own if they do not also have the Group and Shared Resources Administration permission. The standalone **Corporate Ghost Card Administrator** permission will only give an option to add a new card. To view and edit the existing ghost cards the user should also have either one of the following permissions along with the Corporate Ghost Card Administrator: • Company Administration • Group and Shared Resources Administration **NOTE:** For more information, refer to *the Relationship Between Company Admin, Ghost Card Admin, and Card Owner* topic in the *Divisional View Travel Service Guide*.
Custom Field Administrator	The user assigned this role can access to the **Manage Custom Fields** link on the **Company Admin** page. **NOTE:** The **Company Groups** link and the links in the **Group Administration** section are always present for anyone with administrative privileges, but users can only edit (not add) groups they own if they do not also have the Group and Shared Resources Administration permission. Refer to the *Custom Text Travel Service Guide*.
Data Retention Administrator	The user is assigned this role can access the **Data Retention** link on the **Company Admin** page and the **Hold User** and **Purge User** buttons in **User Administration**. Refer to the *Shared: Data Retention Setup Guide* and the *Shared: Data Retention User Guide.*
Employee Maintenance	The user assigned this role can manage employees, including assigning roles, delegates, and preferences. However, they cannot create a new user account. Refer to the *User Administration in Travel, Expense, Invoice, and Request* section of this guide for more information about assigning roles.

Travel Tab	
Permission	**Description**
Group and Shared Resources Administration	The user assigned this role can view and modify groups. You can assign this permission by itself. **NOTE:** If a user owns a group or is in a group that owns a group, the user will not be able to modify that group without this permission. Ownership of a group provides no additional access.
Guest Booking	The user assigned this role can create reservations for non-profiled travelers. Refer to the *Sponsored Guest User Travel Service Guide* and the *Non-Profiled Travel Travel Service Guide.*
Import Data Administrator	The user assigned this role can import data from a customer site, instead of logging into the agency site and selecting **Administration** > **Travel** > **Travel System Admin** > **Import Data**.
Localization Admin / Localization User	Localization Admin is assigned only ***to*** SAP Concur employees; Localization User is assigned only ***by*** a Localization Admin
Manifest Administrator	The user assigned this role can perform a multi-user clone. This role allows companies to determine who should manage travel on behalf of a large group.
Meeting Center Developer Third Party	The user assigned this role can test screens and documentation for a third-party meeting product with XML integration. **NOTE:** This permission appears only if you have enabled Concur Meeting via the new site setup work order.
Online Order Form Access	The user (TMC) assigned this role can allow its agents to access to the online order form. **NOTE:** This permission is visible only when the Concur Travel Reseller module is given to the TMC by SAP Concur. Refer to the *Online Order Form Travel Service Guide.*
Organization Unit Administration	The user assigned this role can create and edit organizational units. You can assign this permission by itself.

Travel Tab	
Permission	**Description**
Password Manager	The user assigned this role can update passwords for Travel users. User will have read only access to the following fields on the user details page in User Administration: Title, First Name, Middle Name, Nickname, Last Name, Suffix, and Email. **Preventing Access:** A module property is available to restrict this role from changing passwords - contact SAP Concur directly to have the *Password Access Restriction* feature activated. **NOTE:** The users with Travel and either Expense or Invoice have one password for all applications. When any of the Password Manager roles changes a password, it changes for all applications.
Permission Administrator	The user assigned this role can access the **User Permissions** menu and the **Travel** tab. **NOTE:** This role is automatically assigned when the Role Administrator role is assigned via Expense, Invoice, and Request.
Profile Sync Administrator	The user assigned this role can update and retrieve passwords from the **Profile Sync Configuration** page.
Profile User	The user assigned this role can update their profile only and not have access to the Travel booking wizard. **NOTE:** When a site is created, the 'ALL' group is automatically added to the Travel Wizard User permission. You must manually remove the 'ALL' group from this permission if you do not want travelers to have access to update both their profile and make a reservation. Make sure the Project team has access to the booking wizard for testing purposes by creating another Group for that team and granting the appropriate permissions.
Report Admin	The user assigned this role can define who has access to reports. Refer to the *Travel Reporting User Guide.* You can assign this permission by itself.
Report User	The user assigned this role can view reports. You must assign this permission in order for users to view company reports; however, you must also assign individual reports in the Report Admin. Refer to the *Travel Reporting User Guide*. You can assign this permission by itself.

Travel Tab	
Permission	**Description**
Risk Management Admin	The user assigned this role can use the Concur Risk Management feature. Refer to the *Authorization Request: Risk Management User Guide* for more information.
Self-assigning Assistant	The user assigned this role can assign themselves as an assistant. If you assign this permission to a user or group, those users can select a traveler to assist.
Self-Registration Approver	The user assigned this role can approve the self-registrations within his/her own company. Refer to the *Self-Registration Travel Service Guide.*
Sponsor	The user assigned this role can be assigned as the sponsor for the guest user. Refer to the *Sponsored Guest User Travel Service Guide.*
Travel Agent	The user assigned this role can access Expert Agent (XA), if you have also assigned the Company Administration permission. With this permission: • The **Travel System Admin** link may be displayed but will only provide data based on the backend setup. • The **Import Data** link will appear within Company Administration.
Travel Meeting Center Admin Third Party	The user assigned this role can use a third-party meeting product with XML integration administrator screens; allows Concur Meeting administration ***without*** the SAP Concur registration module. **NOTE:** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.
Travel Meeting Center User	The user assigned this role can access meetings to which they are invited (this is for both third-party and Concur Meeting products). **NOTE:** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.
Travel Policy Administrator	The user assigned this role can administer Travel Policy. You can assign this permission by itself. Assigning this permission provides access to: • E-Receipt Admin • Travel Admin • Travel Rule Builder • Travel Reporting • Travel Templates (administering for all users)

Travel Tab	
Permission	**Description**
	• Credit Card BIN Restrictions • Unused Tickets • Meeting Center Admin **NOTE:** This link appears if you have assigned Meetings Admin permission or Travel Meeting Center Admin Third Party permission. • Manage Corporate Discounts **NOTE:** This link appears if you have assigned both this permission and the Company Discount Administrator permission.
Travel Wizard User	The user assigned this role can access to the Travel profile and Travel Wizard to make online reservations. This permission is automatically assigned to ALL (group).
UI Preview	The user assigned this role can preview the *enhanced* user interface.
User Administration	The user assigned this role can modify and add Travel users. Assigning this permission provides access to: • Add User • Self-Registration Setup • Self-Registration Approval • Send Mobile Instructions • Company Groups **NOTE:** A user assigned the User Administration permission will be able to see but not use **Company Groups** (**User Administration** section of the left menu) unless the user is also assigned the Group and Shared Resources Administration permission. **NOTE**: Users assigned to this permission will be able to assign employees to Company Groups and Rule Classes which could result in granting them user permissions which are enabled for such Company Groups and Rule Classes.
User Admin (Read Only)	The user assigned this role can view but not change ***any*** user information, including passwords; the user can view using the User Admin page but cannot access the user's profile. **NOTE:** If the user also has Employee Maintenance or Sponsor permission, those permissions take precedence this permission.
Virtual Payment Administrator	Allows users to manage Virtual Payments (Conferma) Refer to the *Virtual Payment (Conferma) Travel Service Guide*.

Travel Tab	
Permission	**Description**
Web Services Administrator	The user assigned this role can: • Access the **Partner Application Administration** page to register or enable partner applications to access the company’s data using the SAP Concur web services. The partner applications are required for some integrations, and do not appear in the SAP Concur App Center. • Access the **Manage User Apps** page to restrict the User applications in the SAP Concur App Center for their company's users. • Enable Enterprise partner applications within the SAP Concur App Center. For more information, refer to the *Shared: App Center Administrator User Guide*.
zAuto-Cancel User	The user assigned this role can test general functionality in Concur Travel. Reservations made by users with this permission: • Will not have custom PNR finishing remarks added • Will not be queued to any queues defined in the Agency Configuration • Will not show in reports • Will be auto-canceled in the GDS after 4 hours
zDemo/Training/ Practice User	The user assigned this role can test the integration between Concur Travel and other SAP Concur products. Reservations made by users with this permission: • Will generate “demo” e-tickets and e-receipts • Will not have custom PNR finishing remarks added • Will not be queued to any queues defined in the Agency Configuration • Will not show in reports • Will be auto-canceled in the GDS after 4 hours When applied to a login ID, the SAP Concur standard invoicing practices will apply unless you utilize the non-invoiced policies. Access additional information via the SAP Concur support portal. **NOTE:** In emergency situations, you can use the *agent claimed* remark to prevent bookings made with Z Demo permission from being auto-cancelled.

Expense Tab

Expense Tab		
Role	**Description**	**Product Area**
App Center Listing Administrator	The user assigned this role can submit App Center listings. This role is only assigned by SAP Concur to certain App Center partners.	Shared with two or more SAP Concur products
Attendee Administrator	The user assigned this role can view, modify, and activate or inactivate any attendee record in the system. ***Group-aware***: When assigning this role**,** one or more groups must be selected.	Shared with two or more SAP Concur products
Attendee Administrator (Read only)	The user assigned to this role is considered a read-only auditor. The user can access and view but not modify and activate or inactivate an attendee record in the system. ***Group-aware***: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Authorized Approver	This is special approver role, which is not assigned the same way as other roles. Refer to the *Expense: Workflow - Authorized Approvers Setup Guide*.	Expense
Budget Administrator	The user assigned this role configures the Fiscal Calendar, Budget Categories, Budget Tracking Fields, Budget Items, and Budget Settings. The Budget Administrator can see the budget amounts as configured in the Budget Items, but not the budget actuals as is shown in the dashboards. Budget Administrators have access to all budget items within an entity. For Budget documentation, refer to the *Shared: Budget Setup Guide*.	Shared with two or more SAP Concur products
Budget Approver/Manager	The user assigned this role approves invoices, purchase requests, and expense reports and can view budgets in the budget dashboards. The Budget Approver does not have access to the budget configuration information. For Budget documentation, refer to the *Shared: Budget Setup Guide*.	Shared with two or more SAP Concur products
Budget Owner	The user assigned this role owns the budget and can view budgets in the dashboards. The Budget Owner does not have access to the budget configuration information. For Budget documentation, refer to the *Shared: Budget Setup Guide*.	Shared with two or more SAP Concur products

<table>
<tr><th colspan="3">Expense Tab</th></tr>
<tr><th>Role</th><th>Description</th><th>Product Area</th></tr>
<tr><td>Budget Viewer</td><td>The user assigned this role views budgets in the dashboards. There can be one or several budget viewers. The Budget Viewer does not have access to the budget configuration information.
For Budget documentation, refer to the Shared: Budget Setup Guide.</td><td>Shared with two or more SAP Concur products</td></tr>
<tr><td>Card Program Administrator</td><td>The user assigned this role manages the company's purchase card program and statement periods.
Group-aware: When assigning this role, one or more groups must be selected.</td><td>Expense</td></tr>
<tr><td>Central Reconciliation Processor</td><td>The user assigned this role processes (matches) invoice transactions associated with requests generated within the Request product.
Group-aware: When assigning this role, one or more groups must be selected.</td><td>Expense</td></tr>
<tr><td>Client Expense Administrator</td><td>This custom role is not available to all clients; availability is based on the client configuration.
It combines permissions from the Expense Configuration Administrator role and the Shared Configuration Administrator.
The user assigned this role can access these options (some may allow add/edit; some may be view-only):
Accounting administration
Audit rules
Car configuration
Email reminders
Exceptions
Expense Types
Locations
Policies
Travel allowance
Workflows</td><td>Expense</td></tr>
<tr><td>Company Bill Statement Approver</td><td>The user assigned this role approves statement reports. This user must also be assigned the Expense Approver role.
Refer to the Expense: Company Bill Statement Reports Setup Guide.</td><td>Expense</td></tr>
</table>

Expense Tab		
Role	**Description**	**Product Area**
Company Bill Statement Processor	The user assigned this role views and updates statement reports in Expense Processor. This user must also be assigned the **Expense Processor** role. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Expense: Company Bill Statement Reports Setup Guide.*	Expense
Company Bill Statement Processor (Audit)	The user assigned this role views statement reports in Expense Processor in read-only format. This user must also be assigned the **Expense Processor (Audit)** role. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Expense: Company Bill Statement Reports Setup Guide*.	Expense
Company Bill Statement Processor Manager	The user assigned this role views, updates, and deletes statement reports in Expense Processor. This user must also be assigned the **Expense Processor Manager** role. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Expense: Company Bill Statement Reports Setup Guide*.	Expense
Company Bill Statement User	The user assigned this role reviews and submits the purchasing card transactions in the statement reports. This user must also be assigned the **Expense User** role. Refer to the *Expense: Company Bill Statement Reports Setup Guide*.	Expense
Company Info Administrator	The user assigned this role can update the **Company Info** section of the home page.	Shared with two or more SAP Concur products
Concur Mobile User	***Do not use; is not associated with the SAP Concur mobile app.***	
Cost Object Approver	This is special approver role, which is not assigned the same way as other roles. Refer to the *Expense: Workflow – Cost Object Approvers Setup Guide*.	Expense
Data Retention Administrator	The user assigned this role views and configures the data retention policy for the company and can hold and purge individual users.	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
Digital Compliance Administrator	The user assigned this role views the E-Bunsho Timestamp validation tool.	Expense
Employee Administrator	The user assigned this role can add and manage employees, including assigning roles, delegates, and preferences. The user can only assign the basic user roles (Expense User, Travel User), using the check boxes on the User Details page. They may also view and optionally edit and register cars on behalf of a user. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *User Administration in Travel, Expense, Invoice, and Request* section of this guide for more information about assigning roles. Refer to *Expense: Car Configuration Setup Guide* for information about configuration and managing cars for the user.	Shared with two or more SAP Concur products
Employee Administrator (Read Only)	The user assigned to this role is considered a read-only auditor. The user can view but not add or edit employee records. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *User Administration in Travel, Expense, Invoice, and Request* section of this guide for more information about assigning roles.	Shared with two or more SAP Concur products
Employee Maintenance	The user assigned this role can manage employees, including assigning roles, delegates, and preferences. However, they cannot create a new user account. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *User Administration in Travel, Expense, Invoice, and Request* section of this guide for more information about assigning roles.	Shared with two or more SAP Concur products
Expense Approver	The user assigned this role can approve expense reports within an assigned group. **NOTE:** This approver is also automatically assigned as the Travel Approver if the employee is a Travel user.	Expense

Expense Tab		
Role	**Description**	**Product Area**
Expense Cash Advance Administrator	The user assigned this role can view, issue, and manage cash advance requests. ***Group-aware***: When assigning this role, one or more groups must be selected.	Expense
Expense Company Card Administrator	The user assigned this role can: • Assign and unassign company cards • Map expense types to merchant category codes ***Group-aware***: When assigning this role, one or more groups must be selected.	Expense
Expense Configuration Administrator	***This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.*** The user assigned this role can ***fully manage*** (add, edit, delete): • Expense group configurations • Policies • Expense-based forms and fields, validations, and vendor lists • Expense report and authorized approver workflows • Audit rules • Expense types and expense categories • Payment types • Account codes • Exceptions • Car configuration and reimbursement • Receipt handling, including payment hold, scan configurations, receipt limits, and receipt imaging • Email reminders • Reimbursement currencies • Offline settings • Configuration change log (view only) • Taxability and Deductibility Calculation Service ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator role.	Expense

Expense Tab		
Role	**Description**	**Product Area**
Expense Configuration Administrator (Restricted)	The user assigned this role can ***fully manage*** (add, edit, delete): • Vendor list items • Authorized approvers • Audit rules • Account codes • Exceptions • Personal and company car rates • Receipt handling, including receipt limits, payment hold, and scan configurations • Email reminders • Configuration change log (view only) ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.	Expense
Expense Processor	The user assigned this role: • Can view and update expense reports within Expense Processor • Cannot delete expense reports The **Access for Processor** field limits the reports the processor can view to these options: • Display all reports excluding returned reports • Display all reports including returned reports • Display only reports pending processor step and beyond ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE**: The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are: 1. Expense Processor Manager 2. Expense Processor 3. Expense Processor (Audit)	Expense

Expense Tab		
Role	**Description**	**Product Area**
Expense Processor (Audit)	The user assigned this role: • Can view expense reports within Expense Processor • Cannot update or delete expense reports ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE**: The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are: 1. Expense Processor Manager 2. Expense Processor 3. Expense Processor (Audit)	Expense
Expense Processor Manager	The user assigned this role can view, update, and delete expense reports within Expense Processor. The **Access for Processor** field limits the reports the processor can view to these options: • Display all reports excluding returned reports • Display all reports including returned reports • Display only reports pending processor step and beyond ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE**: The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are: 1. Expense Processor Manager 2. Expense Processor 3. Expense Processor (Audit)	Expense
Expense Proxy Logon	The user assigned this role can log on to Expense and act as a proxy user for other employees within an assigned group. ***Group-aware***: When assigning this role, one or more groups must be selected.	Expense
Expense Receipt Processor	The user assigned this role can update the receipt status for an expense report.	Expense

Expense Tab		
Role	**Description**	**Product Area**
Expense User	The user assigned this role can create and submit expense reports and cash advances if those features are used by the user's company.	Expense
Extract Administrator	Special role assigned by the SAP Concur Implementation department to clients who are transitioning from the Standard Edition to the Professional Edition. This role provides access to the File Export Configuration tool.	Expense
Fringe Benefits Tax Administrator	Along with the Tax Administration role, the user assigned this role can manage fringe-benefit tax.	Expense
Import/Extract Administrator (formerly Integration Administrator)	***This role is intended to be assigned to and used by SAP Concur internal staff only.*** A user assigned this role can: • Manage (add, edit, delete) import, extract, archive, and reporting consolidation jobs • Schedule jobs • View the system log	Shared with two or more SAP Concur products
Import/Extract Monitor (formerly Integration Administrator - Restricted)	A user assigned this role can ***view***: • Details of import, extract, archive, and reporting consolidation jobs • Job schedule • System logs Depending on configuration, this user may also be able to: • Upload import files • Download extract files	Shared with two or more SAP Concur products
Integration Manager	The user assigned this role can access the **Monitor Integrations** page (**Administration > Tools > Monitor Integrations**), has the ability to browse and search obligation documents, and has permission to Retry or Send Back obligation documents. This role is associated with the Funds and Grants Integration with Concur Solutions. For more information, refer to the *Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition*.	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
Integration Manager Advanced	The user assigned this role can access the **Monitor Integrations** page, has the ability to browse and search obligation documents, and has permission to Retry, Send Back, or Bypass obligation documents. This role is associated with the Funds and Grants Integration with Concur Solutions. For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.	Shared with two or more SAP Concur products
Integration Manager View Only	The user assigned this role can access the **Monitor Integrations** page, and has the ability to browse and search obligation documents, but they cannot perform any actions for obligation documents on the page. This role is associated with the Funds and Grants Integration with Concur Solutions. For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.	Shared with two or more SAP Concur products
Password Manager	The user assigned this role can update passwords for Expense users. User will have read only access to the following fields on the User Details page in User Administration: Title, First Name, Middle Name, Nickname, Last Name, Suffix, and Email. **Preventing Access:** A module property is available to restrict this role from changing passwords - contact SAP Concur directly to have the *Password Access Restriction* feature activated. **NOTES:** • The users with Expense and either Travel or Invoice have one password for all applications. When any of the Password Manager roles changes a password, it changes for all applications. • ***Group-aware***: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
Payroll Administrator	A user assigned this role can perform these actions in the **Payroll Integration** tool (used by the Payroll Integration for SAP ECC, SAP S/4HANA, and SAP S/4HANA Cloud): • Manage Payroll Settings • Manage Wage Types • Re-send failed payroll documents	Expense
Reimbursement Auditor	A user assigned this role can ***view*** Expense Pay functionality: • Funding Accounts • Batch Configurations • Card Programs • Expense Pay Settings • Current and Historical Batch List • Daily Funding and Returned Amounts • Payment Demand List • Report Payees List • Employee Banking Status	Shared with two or more SAP Concur products
Reimbursement Manager	A user assigned this role can ***fully manage*** (add, edit, delete) Expense Pay functionality: • Funding Accounts • Batch Configurations • Card Programs • Expense Pay Settings In addition, a user assigned this role can ***view*** the following Expense Pay details: • Current and Historical Batch List • Daily Funding and Returned Amounts • Payment Demand List • Report Payees List Only ***global*** Reimbursement Managers can ***create*** payment demands and ***view***: • Employee Banking Status ***Group-aware***: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
Role Administrator	A user assigned this role is granted access to the **Expense**, **Invoice**, and **Request** tabs through User Permissions. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *User Administration in Travel, Expense, Invoice, and Request* section of this guide for more information.	Shared with two or more SAP Concur products
Role Builder	***This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.***	Shared with two or more SAP Concur products
Shared Configuration Administrator	***This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.*** The user assigned this role can ***fully manage*** (add, edit, delete): • Feature hierarchies for Expense Reports and Vendor Invoices • Employee group configurations, including assignment of the employee form • Employee forms and fields, validations, and custom and connected lists • Expense and payment delegate configurations • Reimbursement currencies • Imaging settings • Accounting structure (ledgers) • Localization tasks • Configuration change log (view only) ***Group-aware***: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Shared Configuration Administrator (Restricted)	The user assigned this role can: • Access Locations (add or edit) • View, add, edit, and delete custom list items • View the configuration change log ***Group-aware***: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Tax Administrator	The user assigned this role can ***fully manage*** (add, edit, delete) value added tax (VAT): • Tax configurations • Rates	Expense

Expense Tab		
Role	**Description**	**Product Area**
Training Administrator	The user assigned this role can access the Training Administration tool to configure client-preferred Training landing page and the contents and contact information that displays.	Shared with two or more SAP Concur products
Verify Administrator	Can configure the Concur Verify application.	Expense
Verify Reports Auditor	Can perform audit tasks within the Concur Verify Reports Audit pages.	Expense
Travel and Expense Pilot User	***Do not use - this role is retired.***	
Travel and Expense User	The user assigned this role can access SAP Concur. The user requires an additional role (Expense User, Travel User, etc.) to access SAP Concur products.	Shared with two or more SAP Concur products
UI Preview	The user assigned this role can preview the *enhanced* user interface.	Shared with two or more SAP Concur products
Web Services Administrator	The user assigned this role can: • Access the **Partner Application Administration** page to register or enable partner applications to access the company's data using the SAP Concur web services. The partner applications are required for some integrations, and do not appear in the SAP Concur App Center. • Access the **Manage User Apps** page to restrict the User applications in the SAP Concur App Center for their company's users. • Enable Enterprise partner applications within the SAP Concur App Center For more information, refer to the *Shared: App Center Administrator User Guide*.	SAP Concur Connect

Request Tab

Request Tab
There are several other roles available on the **Request** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.

Role	Description
Request Administrator	*This is one of the Request processor roles.* The user assigned this role can view and fully manage virtually all requests. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Authorization Request: Processor User Guide*.
Request Approver	The user assigned this role can approve requests within their assigned group.
Request Auditor	*This is one of the Request processor roles.* This is a read-only role. The SAP Concur client can assign this role to TMCs, to its own internal travel agent(s), or to any other user that needs read-only access to requests. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Authorization Request: Processor User Guide*.
Request Configuration Administrator	***This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.*** The user assigned this role can ***fully manage*** (add, edit, delete) all ***request-related*** features on the Request Admin menu. ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator role.
Data Retention Administrator	The user is assigned this role views and configures the data retention policy for the company and can hold and purge individual users.
Request Configuration Administrator (Restricted)	The user assigned this role can ***fully manage*** (add, edit, delete): • List management • Locations • Segment types • Travel agency offices ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.
Request Event Manager	The user assigned this role can create a "master" event request for multiple event attendees. This role must be assigned with the Request Proxy Logon role.
Request Proxy Logon	The user assigned this role can log on to Request and act as a proxy user for other employees within an assigned group. ***Group-aware***: When assigning this role, one or more groups must be selected.

Request Tab	
There are several other roles available on the **Request** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Request User	The user assigned this role can create and submit requests.
Risk Manager	This permission appears only if Request is integrated with Concur Risk Management. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Authorization Request: Risk Management User Guide* for more information.
TMC Agent	*This is one of the Request processor roles.* The SAP Concur client assigns this role to one or more agents of its Travel Management Company (TMC) or to the client's internal travel agent(s). In some regions, it is appropriate for the TMC Agent to access the request after the user submits it but before the approver receives it. This way, the TMC Agent can add/edit the segment amounts – ensuring accuracy for the request approver. ***Group-aware***: When assigning this role, one or more groups must be selected. Refer to the *Authorization Request: Processor User Guide*.

Invoice Tab

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Budget Administrator	The user assigned this role configures the Fiscal Calendar, Budget Categories, Budget Tracking Fields, Budget Items, and Budget Settings. The Budget Administrator can see the budget amounts as configured in the Budget Items, but not the budget actuals as is shown in the dashboards. Budget Administrators have access to all budget items within an entity. For Budget documentation, refer to the *Shared: Budget Setup Guide*.
Budget Approver/Manager	The user assigned this role approves invoices, purchase requests, and expense reports and can view budgets in the budget dashboards. The Budget Approver does not have access to the budget configuration information. For Budget documentation, refer to the *Shared: Budget Setup Guide*.

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Budget Owner	The user assigned this role owns the budget and can view budgets in the dashboards. The Budget Owner does not have access to the budget configuration information. For Budget documentation, refer to the *Shared: Budget Setup Guide*.
Budget Viewer	The user assigned this role views budgets in the dashboards. There can be one or several budget viewers. The Budget Viewer does not have access to the budget configuration information. For Budget documentation, refer to the *Shared: Budget Setup Guide*.
Central Receiver	The user assigned this role can add, edit, and delete purchase order receipts and receipt images. However, they cannot transmit or process purchase orders or invoices.
Client Managed Capture Verifier	The user assigned this role can verify the output of invoices in the client-managed version of Capture Processing.
Data Retention Administrator	The user is assigned this role views and configures the data retention policy for the company and can hold and purge individual users.
Invoice AP User	The user assigned this role can create, assign, and reassign, and delete invoices. They can also reassign a different policy to an invoice and restore deleted invoices. ***Group-aware***: When this role is assigned to a user, one or more groups must also be assigned to the user. **Note:** If vendor groups have been configured through the **Vendor Employee Access** feature, the Invoice AP User can be assigned to the configured vendor groups. If vendor groups are not configured, the AP user is assigned to the Global group by default.
Invoice Approver	The user assigned this role can to approve invoices within an assigned group.

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Invoice Configuration Administrator	***This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.*** The user assigned this role can ***fully manage*** (add, edit, delete): • Invoice group configurations • Policies • Invoice-based forms, fields, and validations • Invoice and authorized approver workflows • Audit rules • Expense types • Account codes and account code hierarchy • Exceptions • Image handling, including scan configurations, invoice imaging, vendor imaging • Email reminders • Company Info • Configuration change log (view only) ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator role.
Invoice Configuration Administrator (Restricted)	The user assigned this role can ***fully manage*** (add, edit, delete): • Authorized approvers • Audit rules • Account codes • Exceptions • Expense types • Scan configurations • Email reminders • Configuration change log (view only) ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE:** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.
Client Managed Capture Verifier	The user assigned this role can verify the output of invoices created through capture processing.

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Invoice Payment Manager	A user assigned this role can ***fully manage*** (add, edit, delete) Invoice Pay functionality. This user can monitor and adjust Invoice Pay batches and invoices scheduled for payment and define the Checking and ACH funding accounts that are used for payment.
Payment Release Manager	Users with this role can access the **Release Payments** option from the **Actions** menu on the **Monitor Batches** page. When the **Require Batches to be Released** setting is configured for Invoice Pay batches, this role allows Payment Release Managers to manually approve/release Invoice Pay batches in pending release status before payments are sent to payment providers for processing. This role can be assigned to one or more users depending on need. Users with this role must also have the Payment Manager role assigned.
Invoice Image Processor	The user assigned this role can update the status of receipt and invoice images.
Invoice Processor	The user assigned this role: • Can view and update invoices within Invoice Processor • Can assign or reassign invoices • Can restore deleted invoices • Cannot delete invoices ***Group-aware***: When assigning this role, one or more groups must be selected. **NOTE**: The user should only be assigned one of the Invoice Processor roles. If the user is assigned multiple Invoice Processor roles, the role with the least level of access will be applied. The levels of access, from highest to lowest, are: 1. Invoice Processor Manager 2. Invoice Processor 3. Invoice Processor (Audit)
Invoice Processor (Audit)	The user assigned this role: • Can view invoices within Invoice Processor • Cannot update or delete invoices ***Group-aware***: When assigning this role, one or more groups must be selected.
Invoice Processor Manager	The user assigned this role can view, update, and delete invoices within Invoice Processor. ***Group-aware***: When assigning this role, one or more groups must be selected.

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Invoice Proxy Logon	The user assigned this role can log on to Vendor Invoices and act as a proxy user for other employees within an assigned group. ***Group-aware***: When assigning this role, one or more groups must be selected.
Invoice Purchasing User	**NOTE:** This role is available ***only*** to users of Invoice. The user assigned this role *cannot* create and submit invoices but can be granted rights to change form field values to adjust totals, etc. in Invoice Purchase Order.
Invoice Receipt Processor	The user assigned this role: • Can view and update invoices in Invoice Received status within Invoice Processor • Cannot delete invoices ***Group-aware***: When assigning this role, one or more groups must be selected.
Invoice Tax Administrator	The user assigned this role can configure and activate the Tax Administration tool.
Invoice User	The user assigned this role can create and submit invoices.
Invoice Vendor Manager	The user assigned this role can work with vendors, including approving new vendors, working with the master list, and mapping vendors. ***Group-aware***: When assigning this role, one or more groups must be selected.
Purchase Order Processor	The user assigned this role can process purchase orders in the Purchase Request module. ***Group-aware***: When assigning this role, one or more groups must be selected.
Purchase Order Processor (Audit)	The user assigned this role can view purchase orders within the purchase order processor and can view receipts within the purchase order processor. However, they cannot update or delete purchase orders or update or delete receipts. ***Group-aware***: When assigning this role, one or more groups must be selected.
Purchase Request Approver	The user assigned this role can approve purchase requests in the Purchase Request module.
Purchase Request Processor	The user assigned this role can process purchase requests in the Purchase Request module. ***Group-aware***: When assigning this role, one or more groups must be selected.

Invoice Tab	
There are several other roles available on the **Invoice** tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Purchase Request Processor (Audit)	The user assigned this role can view purchase requests within the purchase request processor but cannot update or delete purchase requests. ***Group-aware***: When assigning this role, one or more groups must be selected.
Purchase Request Proxy Logon	The user assigned this role can log on to Purchase Request and act as a proxy user for other employees within an assigned group. ***Group-aware***: When assigning this role, one or more groups must be selected.
Purchase Request User	The user assigned this role can create purchase requests in the Purchase Request module.
Receipt User	The user assigned this role can enter, update, and delete receipt data for their own purchase orders.

Reporting Tab

Reporting Tab	
Role	**Description**
Budget Role for Cognos	The user assigned this role can access the Budget module in the Analysis/Intelligence data model. ***Group-aware***: When assigning this role, one or more groups must be selected.
CAS Analyst	***Do not use - this role is retired.***
Cognos Business Author	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels within their assigned groups (as well as any data not group-related) • Are assigned the *Business* license type, which restricts the features to which they have access • Can: ♦ Run existing reports ♦ Create new reports or modify existing basic reports using the basic tool – Query Studio ***Group-aware***: When assigning this role, one or more groups must be selected.

Reporting Tab	
Role	**Description**
Cognos Consumer	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels within their assigned groups (as well as any data not group-related) • Are assigned the *Consumer* license type, which further restricts the features to which they have access • Can run existing reports, with read-only access ***Group-aware***: When assigning this role, one or more groups must be selected.
Cognos Professional Author	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels (no group assignment required) • Are assigned the *Professional* license type, which allows access to all features • Can: ♦ Run existing reports ♦ Create new reports or modify existing basic reports using the basic tool – Query Studio ♦ Create new reports or modify existing basic reports using the advanced tool – Report Studio ♦ Schedule automatic report run ***Group-aware***: When assigning this role, one or more groups must be selected.
Consolidation Configuration Administrator	This role is used by companies using the Reporting Database that wish to consolidate the data from the current version and previous versions. The user assigned this role: • Maps expense types and custom fields to a single consolidated definition • Can adjust other consolidation settings **NOTE:** This role does ***not*** include access to Analysis/Intelligence.
Dashboard User	***Retired – do not use***

Section 4: User Administration Page

This feature requires the User Administrator employee role.

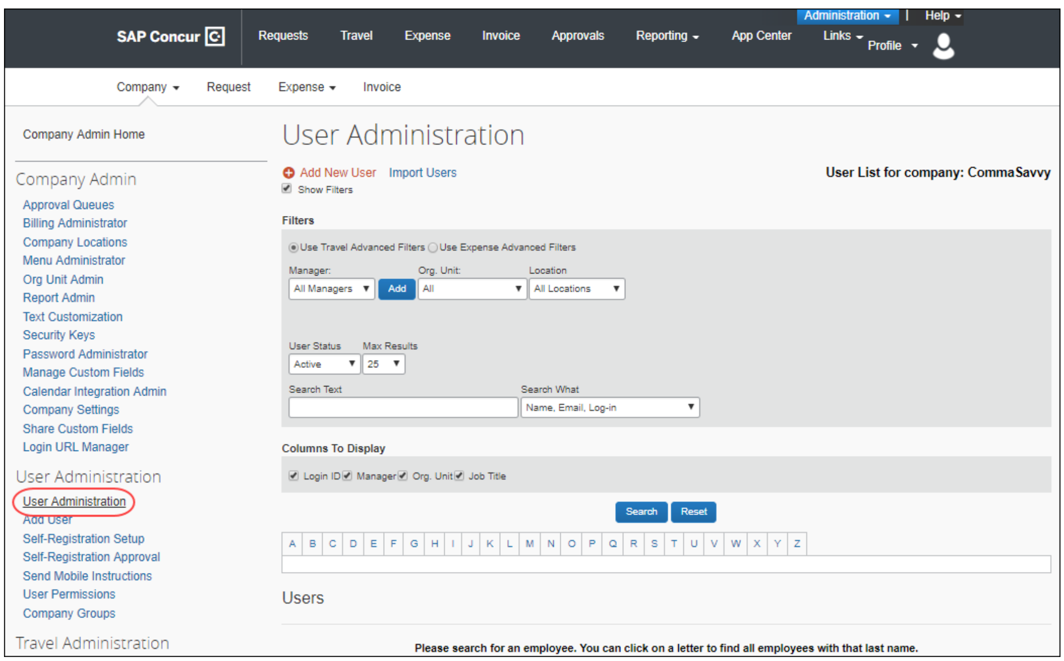
Before You Begin

Before using the user administration section, the Employee Profile form must be configured.

Refer to the *Expense: Forms and Fields Setup Guide* for more information on configuring the employee form.

Accessing User Admin

1. Click **Administration > Company > Company Admin**.
2. Click **User Administration** (left menu).



Searching for Existing Users

The User administrator can search for existing Travel or Expense users. Users with access to both applications will appear in either search.

Searching for Employees Without Managers

The **Managers** field in the search options is used to find employees that do not have a manager/approver assigned.

- When **Expense Advanced Filters** is selected, the **No Manager** option in the **Managers** field will cause users who meet all the other search criteria and do not have an Expense manager/approver to display.
- When **Travel Advanced Filters** is selected, the **No Manager** option in the **Managers** field will cause users who meet all the other search criteria and do not have a Travel manager/approver to display.
- Select the **All Managers** option in the **Managers** field to display users regardless of whether they have a manager assigned.

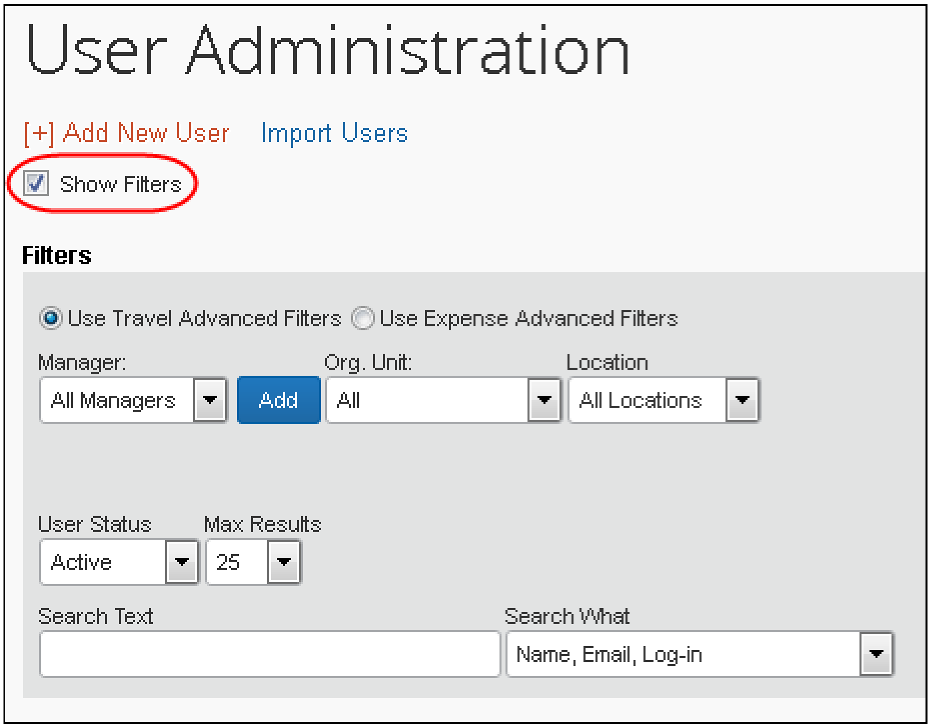
Searching for Test Users

The Expense Test Users field in the search options is used to include or exclude employees of type *Test User* if any users of this type exist in the system (that is, it will not appear is the system does not detect one or more Test Users).

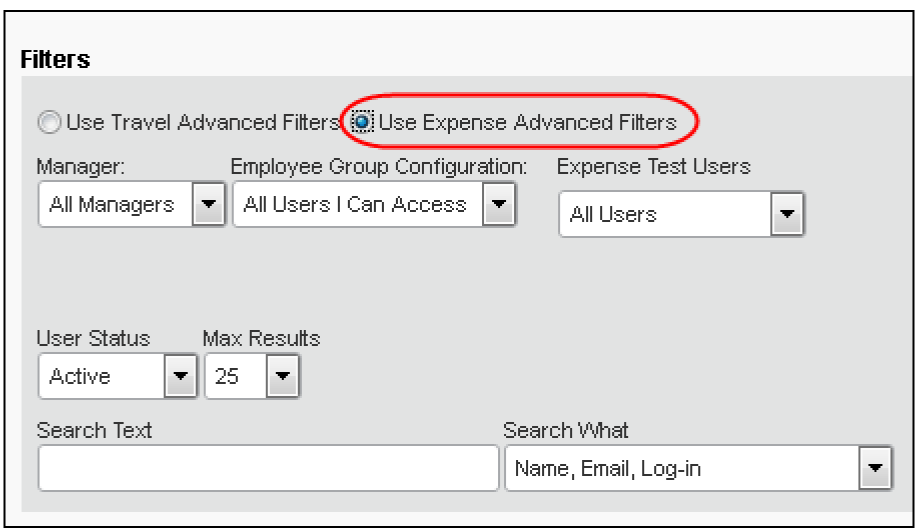
- **All Users:** The filter is ignored, and all test users are returned.
- **Exclude Test Users:** Return the search results without including any Test Users.
- **Only Test Users:** Include only Test Users in the results of the search.

To search for Expense users:

1. On the **User Administration** page, select (enable) the **Show Filters** check box to view the search fields.



2. Select **Use Expense Advanced Filters**.



NOTE: The Expense Employee Administrator role is required in order to see the Expense search filters.

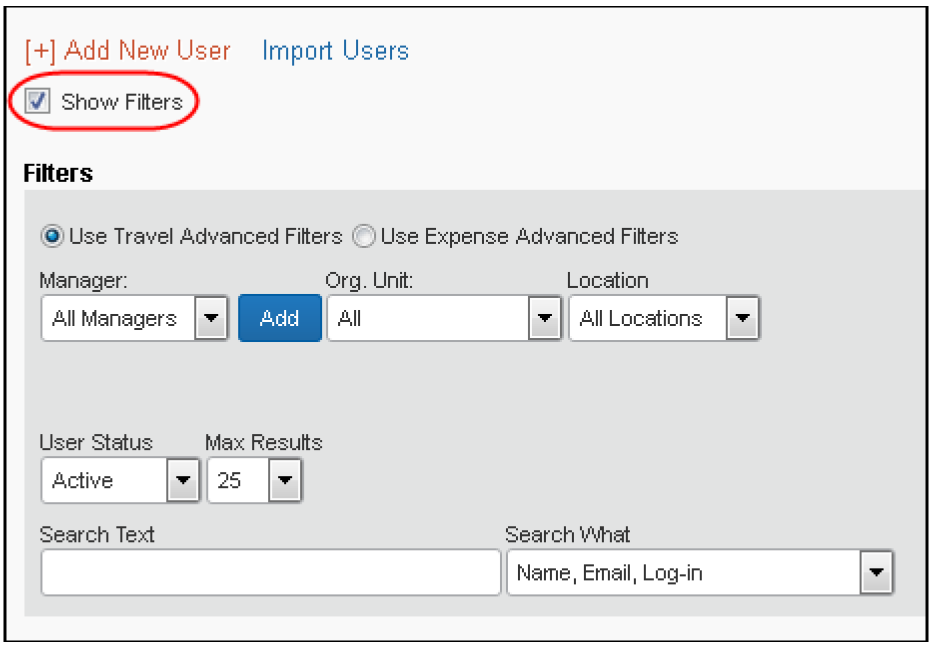
3. Enter the search criteria.

4. Select (enable) the check boxes next to the desired columns to display.

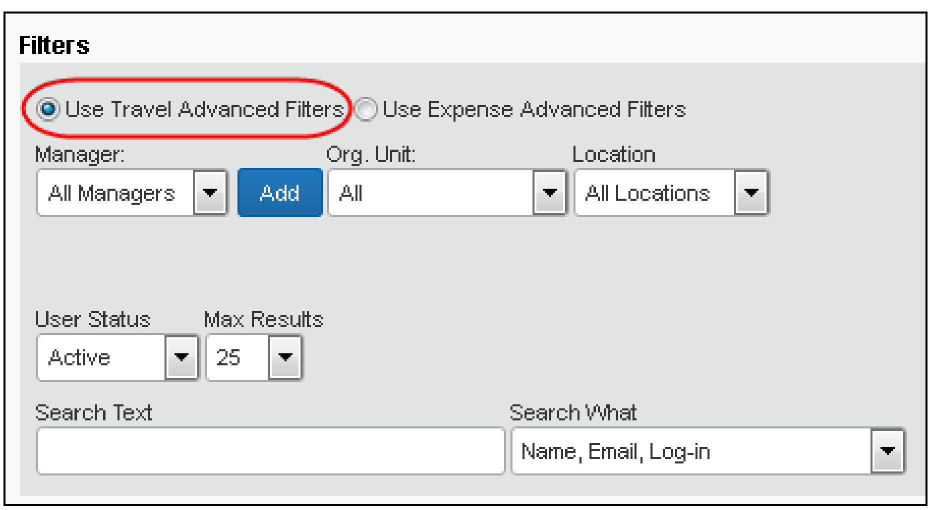
5. Click **Search**.

To search for Travel users:

1. On the user administration page, select (enable) the **Show Filters** check box to view the search fields.



2. Select **Use Travel Advanced Filters**.



3. Enter the search criteria.

4. Select (enable) the check boxes next to the desired columns to display.

5. Click **Search**.

Adding New Users

The User administrator can add new Travel and/or Expense users on the **View Company Users** page. The Employee Maintenance roles cannot create a new user account.

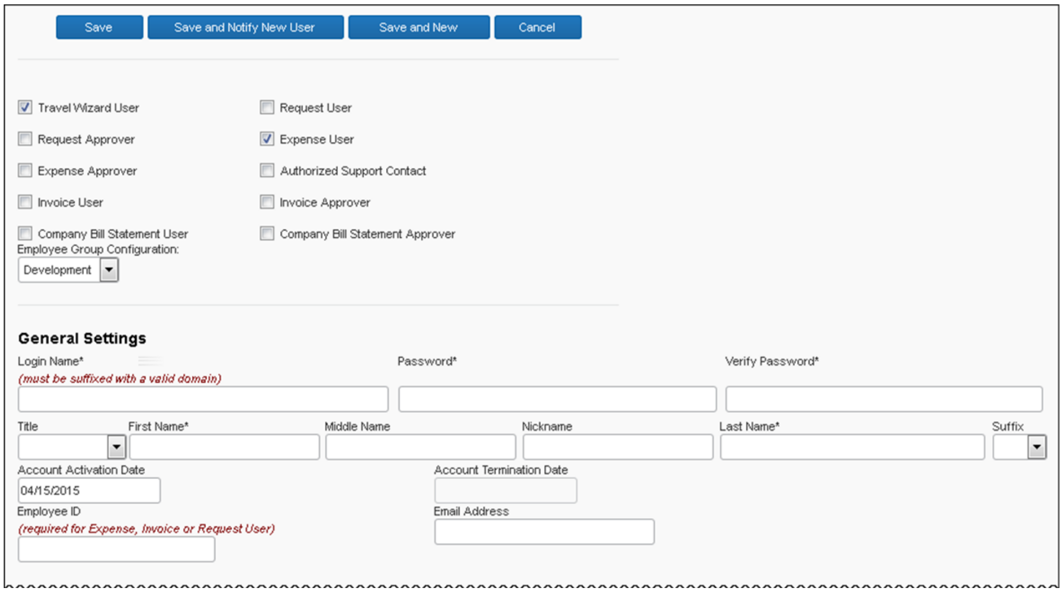
Note the following:

- Your system configuration determines the role check boxes that are displayed. If you are not seeing the role check boxes for all your SAP Concur products, contact SAP Concur support to have your module properties updated.
- If any of the required fields on the employee form are set to read-only, you will not be able to use the user interface to create new users. You will have to use the User Import instead. Administrators who attempt to create users with these form settings will receive the following error: "Users cannot be created via this UI. Please import new users."

Adding New Users

To add new users:

1. On the user administration page, click **Add New User** on the main page or **Add User** in the left menu. The user detail page appears.



NOTE: The role check boxes – **Expense User**, **Invoice Approver**, etc. – may be hidden to prevent assignment by the administrator – consult your SAP Concur administrator for more information.

2. Complete the required fields.

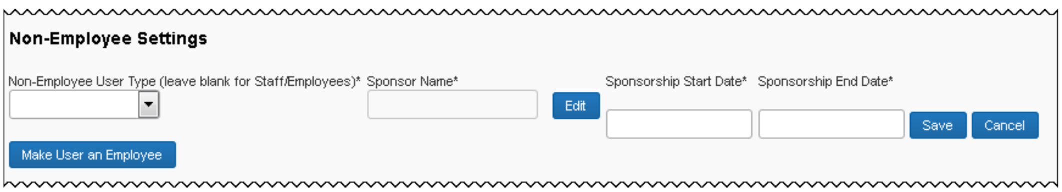
User Roles	
Field	**Description**
Travel Wizard User	The user is able to access Travel and book travel.
Request User	The user is able to access Request and submit requests.
Request Approver	The user is able to access Request and approve requests. This approval may be subject to limitations.
Expense User	The user is able to access Expense and submit expense reports.
Expense Approver	The user is able to access Expense and approve expense reports. This approval may be subject to limitations.
Invoice User	The user is able to access Invoice and create payment demands.
Invoice Approver	The user is able to access Invoice and approve payment demands.

User Roles	
Field	**Description**
Company Bill Statement User	The user is able to access Company Bill Statements.
Company Bill Statement Approver	The user is able to approve Company Bill Statements
Expense Group Configuration	Choose the group configuration that applies to the user. This field is only available when the Expense User, Expense Approver, Invoice User, or Invoice Approver roles are selected.
General Settings Section	
Field	**Description**
Login Name	User's name for logging in **NOTE:** The login name must be unique across all SAP Concur products. If a login name is currently in use in any SAP Concur product, it cannot be assigned again unless the original occurrence is changed. For example, assume that a login name was assigned in error. That login name can only be used again if an admin (either manually or via import) renames the original occurrence, allowing the login name to be used again.
Password and Verify Password	Password for logging in This is the field to use if you want to reset a password as well. **NOTE**: To allow password expiration which prompts users to reset their passwords, you must submit a ticket to SAP Concur support to enable the **Expire Password when set by an Administrator** module property for your company. **Preventing Access:** A module property is available to restrict the ability to change passwords - contact SAP Concur directly to have the *Password Access Restriction* feature activated.
Title	User's title
First Name, Middle Name, Last Name	User's name The user's name should always be the name that appears on their identification for travel purposes.
Nickname	User's nickname
Suffix	User's suffix, if applicable
Account Activation Date	Date the user record was created **IMPORTANT:** This date cannot occur in the future – it must the date of creation or earlier to prevent deactivation of the account.

User Roles	
Field	**Description**
Account Termination Date	Date the user will stop using Travel or Expense If someone is leaving the company or will no longer be traveling, set this date to the last date the person will use the system. You can set this to a date in the past to deactivate someone immediately.
Employee ID	User's employee ID number **NOTE:** This field is required if the Expense User or Invoice User role is selected.
Email Address	User's email address

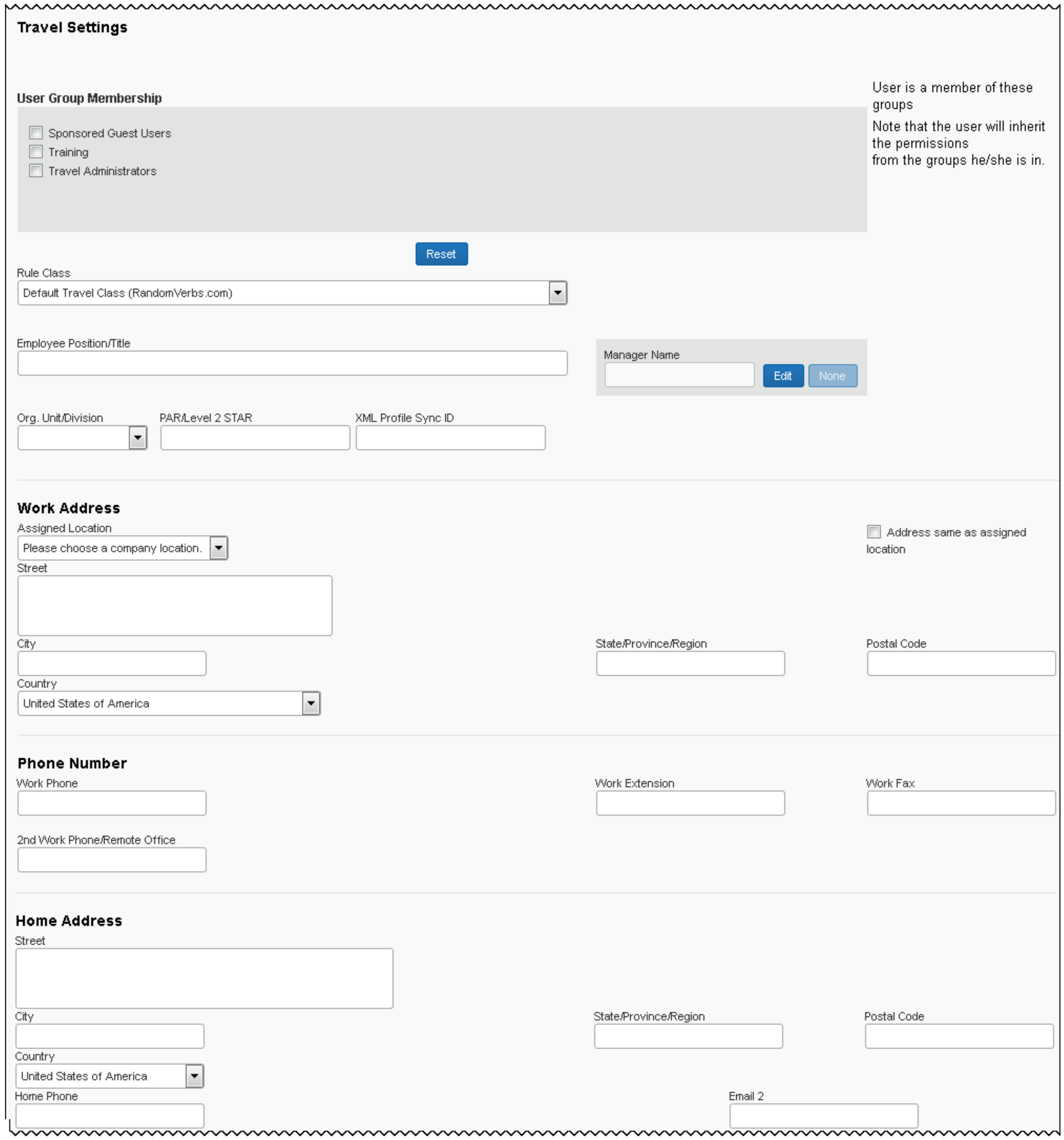
On the remainder of the page, additional fields are displayed or hidden, depending on which user role is selected and the company configuration.

Non-Employee Settings: If the company uses the Sponsored Guest User feature, the administrator will see the Non-Employee Settings section on the **User Details** page.



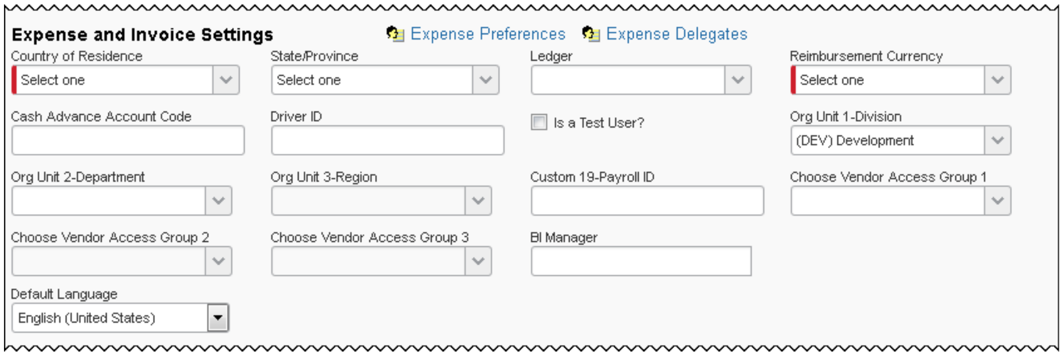
For more information, refer to the *Expense: Sponsored Guest User Setup Guide*.

Travel users: For new users with the Travel Wizard User role, the **Travel Settings** section appears:



NOTE: Be aware that only minimal information is required for Expense-only users. For example, the sections for home and work address do not appear.

Expense and Invoice users: For new users with the Expense User or Invoice User role, the **Expense and Invoice Settings** section appears:



Note the following:

- Clients using the Email or Composite login ID method will see the Logon ID field in the **Expense and Invoice Settings** section. This is the field used to maintain the classic user interface login ID. This field may have a different label depending on the Employee form configuration.
- The **Default Travel Agency** field may appear in this section if the user has the Request User and Expense User roles.

For information about how to complete these fields, refer to the field definitions on the following pages.

Request users: For new users with the Request User role, the **Request Settings** section appears:

NOTE: If a user has the Request User role but not the Expense User role, this area becomes a hybrid of **Request Settings** (shown above) and **Expense and Invoice Settings** (shown previously).

For information about how to complete these fields, refer to the field definitions on the following pages.

3. Complete the additional fields as desired.

NOTE: To add approvers, delegates, or update preferences, you must first save the user, then use the steps in the *Modifying Existing Users* section of this guide.

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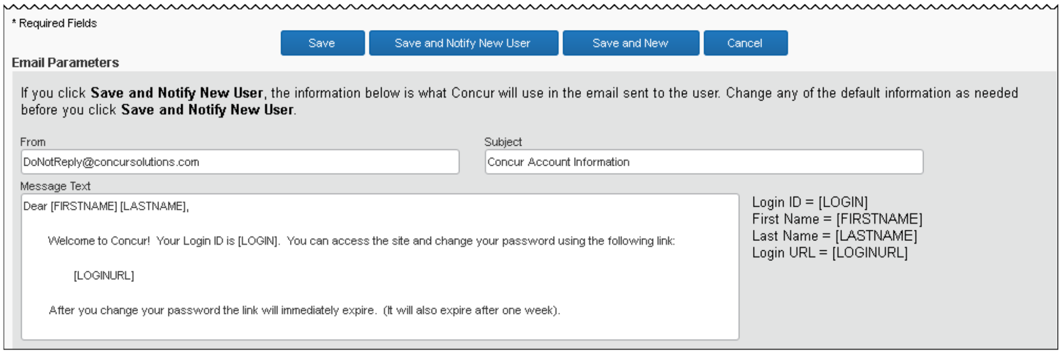
4. At this point, you can:



- Save the information. To do so, click **Save**.
- Save the information and add another new user. To do so, click **Save and New**.
- Notify the new user via email. To do so:
  - Make any desired changes in the **Message Text** area (if any).
  - Click **Save and Notify New User**.

Refer to *Emailing New Users* below.

Emailing New Users

When adding a new user:

- The **Save and Notify New User** button appears on the top and bottom of the page.
- The **Email Parameters** section appears at the bottom of the page.

The **Email Parameters** section contains the default text for the email sent to the new user if the admins clicks **Save and Notify New User**.

Note the following:

- The button and email section appear ***only*** for new employees. They are not available when the admin modifies existing user information.
- The default email information appears, and the admin can edit the **From**, **Subject**, and **Message Text** portion of the email as desired.

  Note the following:

  - There is no mechanism to permanently edit the email text that appears by default. If the admin wants to make changes, they must change it for each new user.
  - **IMPORTANT:** The email will print only 1000 characters of message text – that includes spaces, line breaks, punctuation, etc. The field, however, will let you enter more than that. Be sure to restrict any message text to 1000 characters ***total***.

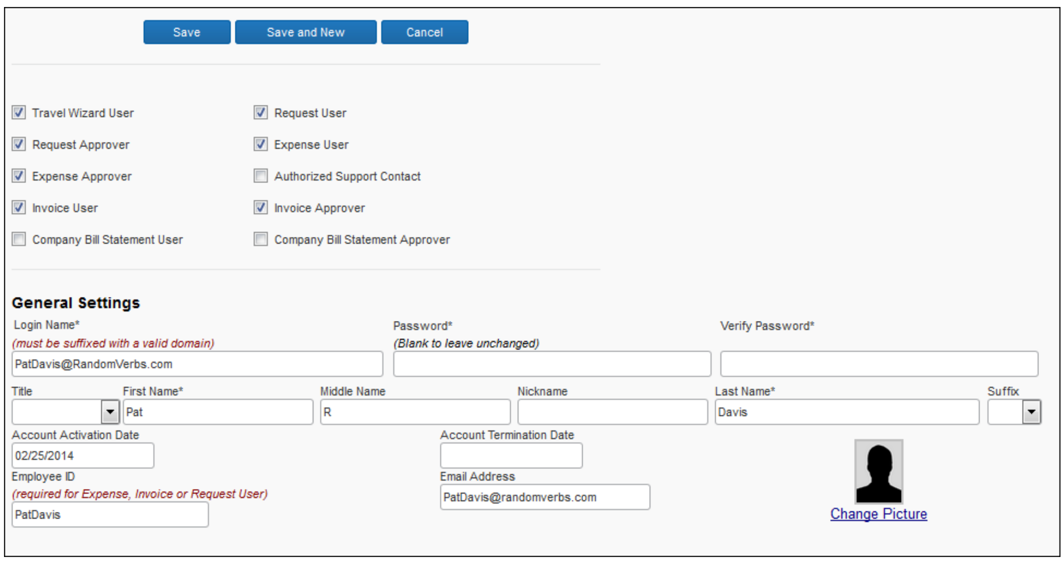
Modifying Existing Users

Update General Information

To update general information:

1. On the user administration page, locate the desired user.

2. Review the user's information and make any needed updates.



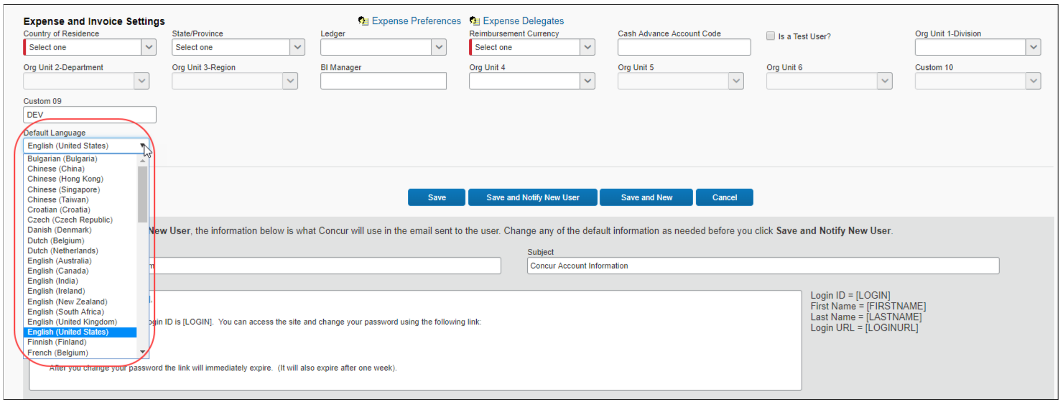
NOTE: The role check boxes (Expense User, Invoice Approver, etc.) may be hidden to prevent assignment by the administrator – consult your SAP Concur administrator for more information.

Refer to *Adding New Users* in this guide for field definitions.

Update Default Language

To update default language:

1. On the user administration page, locate the desired user.
2. From the **Default Languages** list, select the desired language.



NOTE: Changes made to the **Default Language** display after the user signs out and back in again.

3. Click **Save**.

Refer to *Adding New Users* in this guide for field definitions.

Update Mobile Settings

To update mobile settings:

While editing user information (not while adding a new user), the **Mobile Settings** section may appear.

Select the check box as appropriate.

Note the following:

- The **Remote wipe mobile device** check box (in the **Mobile Settings** section) appears only for users who have completed the **Mobile Registration** page (entered a PIN).
- If an administrator selects this check box, the user's PIN is set to null (blank). The next time the user tries to log in, all cached device data is cleared.

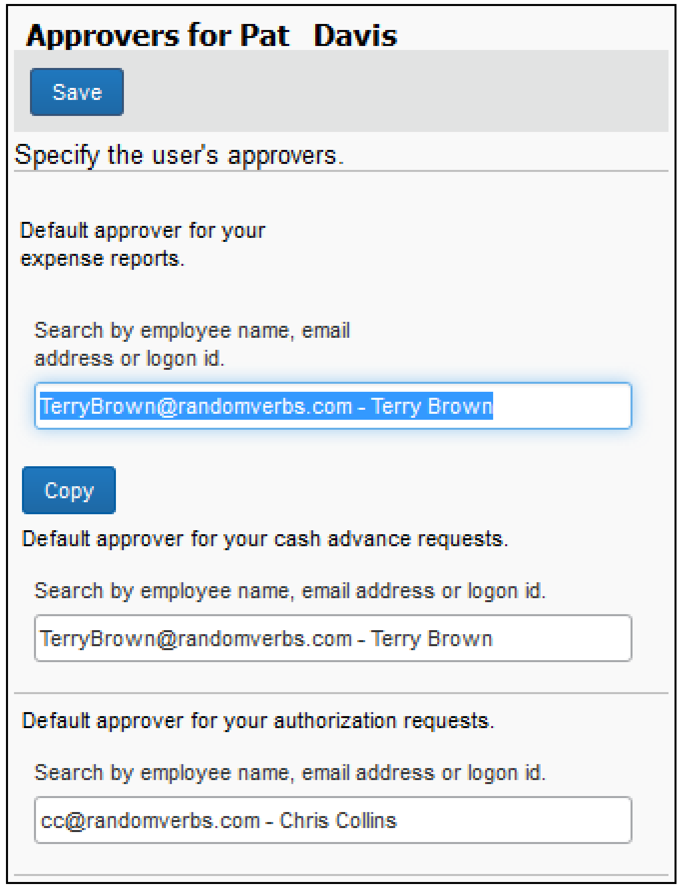
- This flag will also be set automatically by the system if the user enters the wrong PIN five times. Consecutive failed attempts are tracked on the device. If the user exceeds five, the PIN is set to null (blank) and all cached device data is cleared.

Add or Change Expense and Invoice Approvers

To add or change approvers:

1. On the user administration page, to add Expense and Invoice approvers, click **Approvers** (in the **Expense and Invoice Settings** section). The **Approvers** window appears.

NOTE: The cash advance approver field will only appear if that feature has been activated for your company.



Refer to the *Expense: Cash Advance Setup Guide* for more information.

2. Under **Default approver for your expense reports**, type in the details of the desired approver. The list displays possible matches.

3. Select the desired approver.

4. Click **Copy**, if desired. This will copy the expense report approver into all other approver fields. If the approver does not have the appropriate approver roles, the fields will not be updated.

5. Select the other approvers, if desired.

6. Click **Save**.

Add or Change Request Approvers

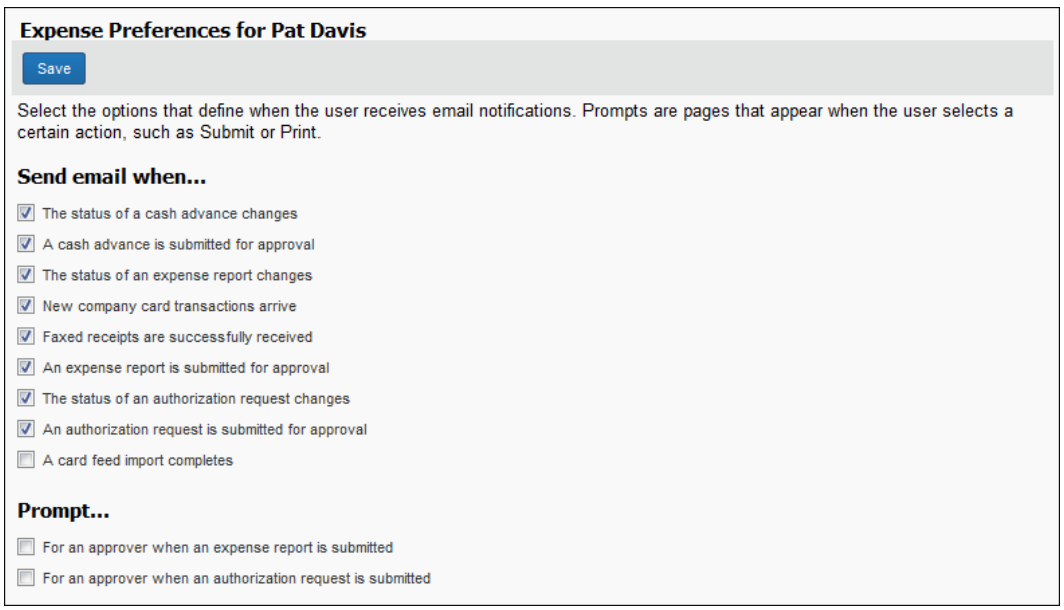
To add or change Request approvers:

1. On the user administration page, click **Request Approvers** (in the **Request Settings** section).
2. Select the desired approver.
3. Click **Save**.

Add or Change Expense Preferences

To add or change Expense preferences:

1. On the user administration page, click **Expense Preferences** (in the **Expense and Invoice Settings** section). The **Expense Preferences** window appears.

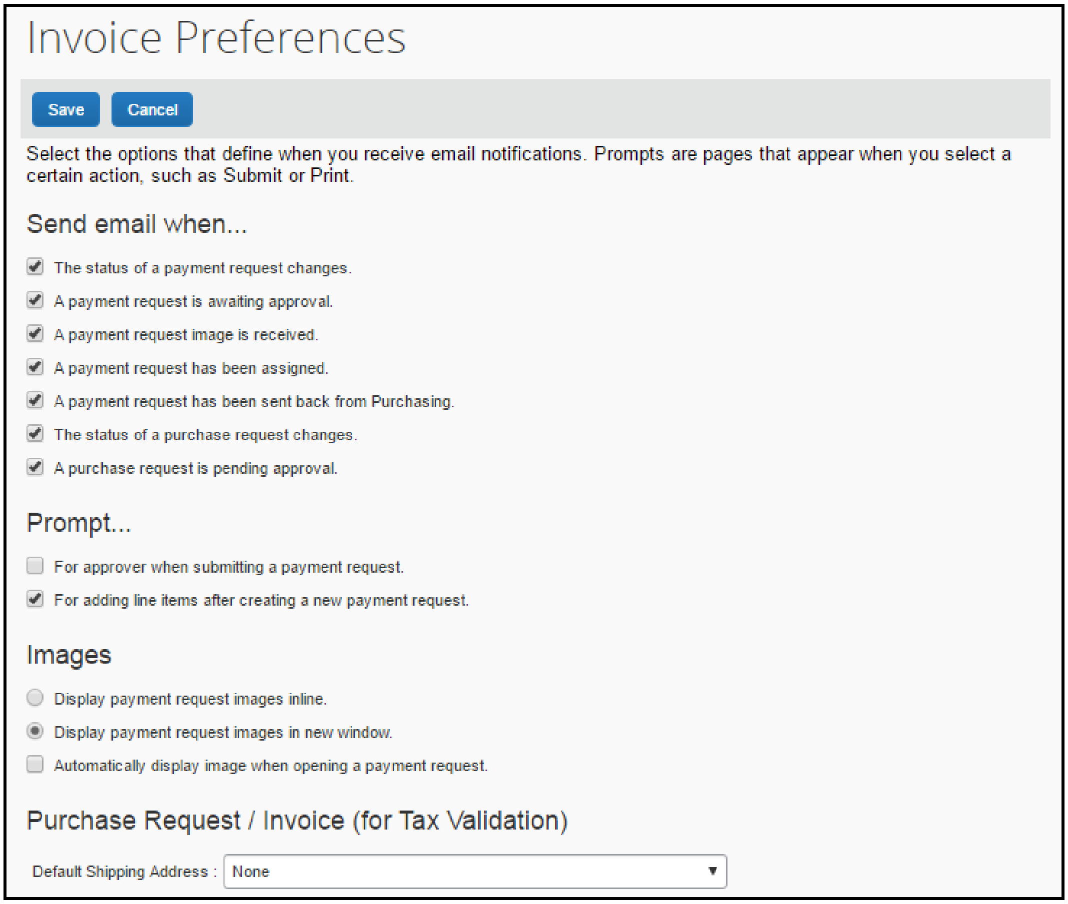


2. Select (enable) or clear (disable) the desired check boxes.
3. Click **Save**.

Add or Change Invoice Preferences

To add or change Invoice preferences:

1. Click **Profile > Profile Settings > Invoice Preferences**. The **Invoice Preferences page** appears.



2. Select (enable) or clear (disable) the desired check boxes.
3. Click **Save**.

Add or Change Request Preferences

To add or change Request preferences:

1. On the user administration page, click **Request Preferences** (in the **Request Settings** section).
2. Select (enable) or clear (disable) the desired check boxes.
3. Click **Save**.

Add Expense and Request Delegates

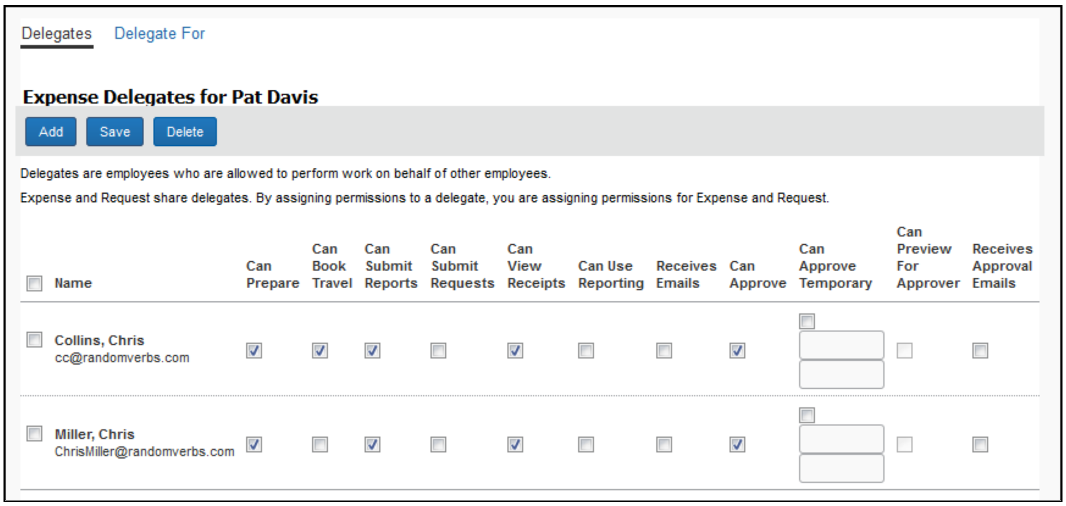
Delegates are shared between Expense and Request. Any additions, deletions, or changes you make in Expense will affect Request, and vice versa.

Maximum Number of Assignments and Using the Expense Proxy Role

Delegates are individuals acting on behalf of a named list of specific users. A reasonable maximum number of user assignments is 250 per delegate, and that is what is supported by SAP Concur. Please use the Expense Proxy role when assigning access for shared service centers: the Expense Proxy role is designed to allow an individual user to support entire Expense groups within the system.

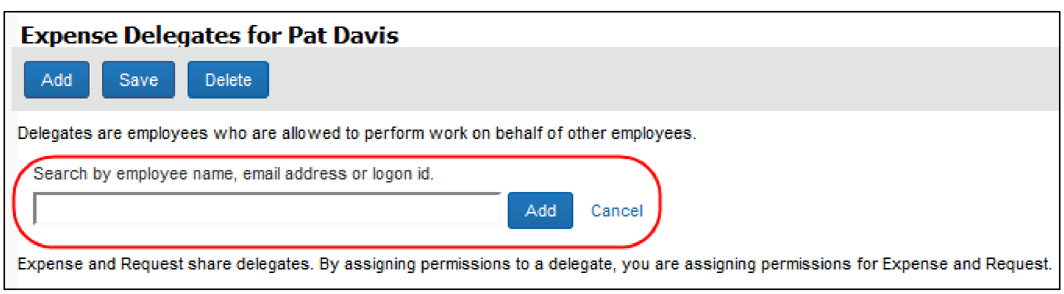
To add Expense and Request delegates:

1. On the user administration page, click **Expense Delegates**. The **Expense Delegates** window appears.



2. Click **Add**.

3. In the **Search by employee name, email address or logon id** field, type in the details of the desired delegate. The list displays possible matches.



4. Select the desired delegate and configure as required.

5. Click **Save**.

6. On the user detail page, click **Save**.

Delete a User's Delegate Assignments

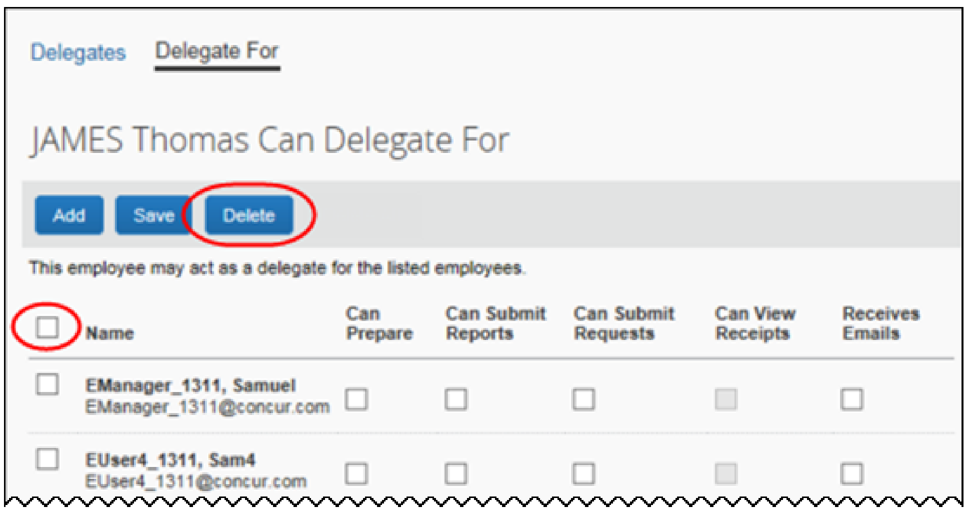
Delegates are shared between Expense and Request. Any additions, deletions, or changes you make in Expense will affect Request, and vice versa.

To delete Expense and Request delegate assignments:

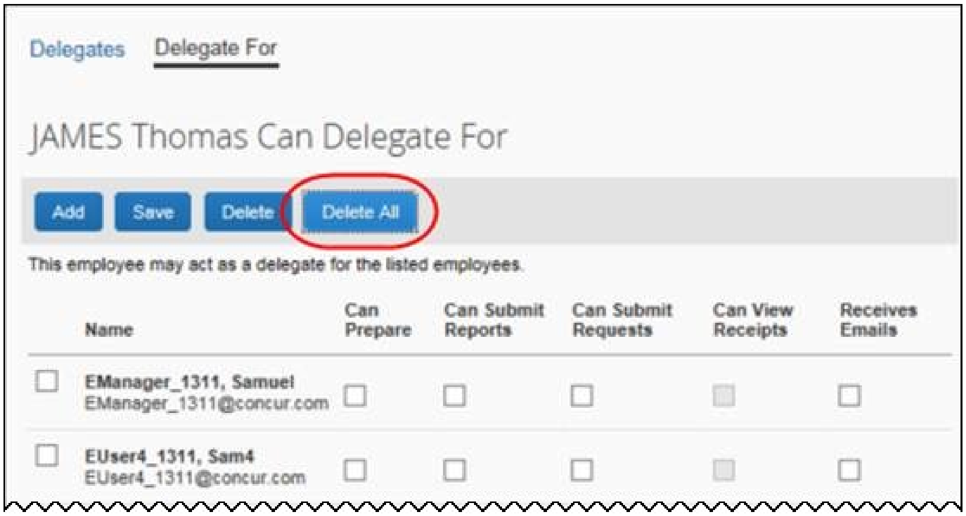
1. On the **User Administration** page, click **Expense Delegates**. The **Expense Delegates** window appears.

2. Click **Delegate For** (tab).

3. If deleting less than 50 users, select each name individually or click the select all check box and click **Delete**.



4. If deleting more than 50 users, click **Delete All** repeatedly as needed.



5. Click **Save**.

Add Invoice Delegates

Use the following procedure to add delegates in Invoice.

MAXIMUM NUMBER OF ASSIGNMENTS AND USING THE INVOICE PROXY ROLE

Delegates are individuals acting on behalf of a named list of specific users. A reasonable maximum number of user assignments is 250 per delegate, and that is what is supported by SAP Concur. Please use the Invoice Proxy role when assigning access for shared service centers: the Invoice Proxy role is designed to allow an individual user to support entire Invoice groups within the system.

▸ *To add Invoice delegates:*

1. On the user administration page, click **Invoice Delegates**. The **Invoice Delegates** window appears.

2. Click **Add**.

3. In the **Search by employee name, email address or logon id** field, type in the details of the desired delegate. The list displays possible matches.

4. Select the desired delegate and configure as required.

5. Click **Save**.

6. On the user detail page, click **Save**.

Add or Change Reimbursement Method

The Reimbursement Method field provides a way for administrators to indicate what method the company wants to use to reimburse the employee. The Expense Report web service uses this as a search term to find reports with the specified employee Reimbursement Method. It does not impact the accounting extracts. It will appear only if you have added it to the Employee Form.

To add or change Reimbursement Method:

1. On the user administration page, in the **Expense and Invoice Settings** section, select the desired value in the **Reimbursement Method** field.
2. Click **Save**.

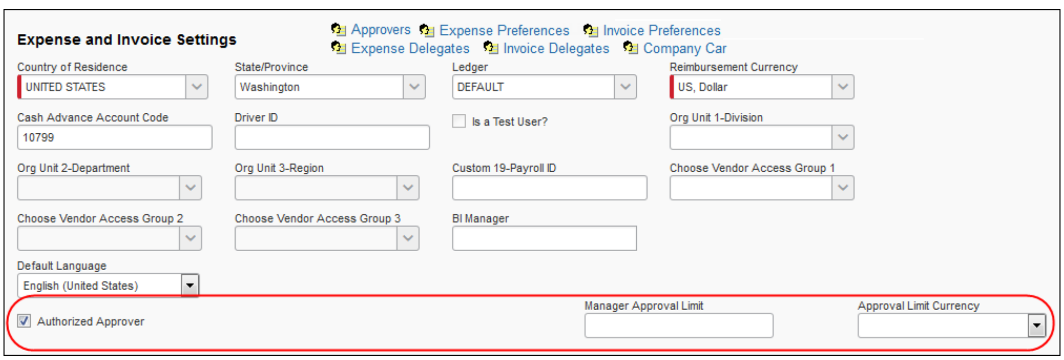
Add Expense Authorized Approver or Cost Object Approvers

! **IMPORTANT:** In order to see the check box or link described below, the user must have the User Admin rights ***and*** the Expense Admin rights; the employee must have the standard approver role.

EXPENSE AUTHORIZED APPROVER

If a company uses the authorized approver feature in Expense, based on the company's configuration, the company will see one of these methods - never both.

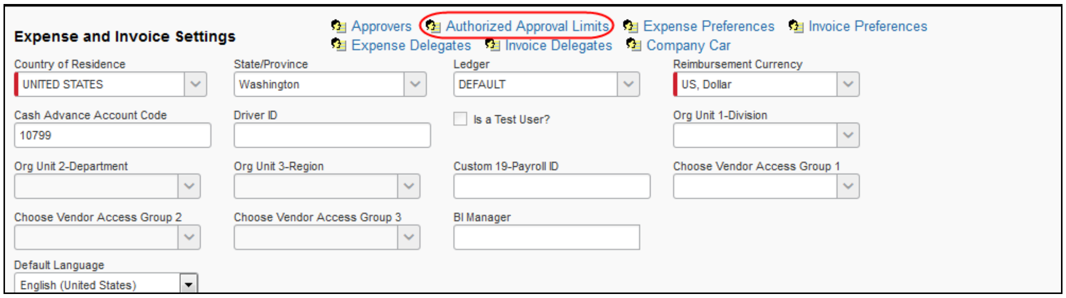
- **Authorized Approver** check box



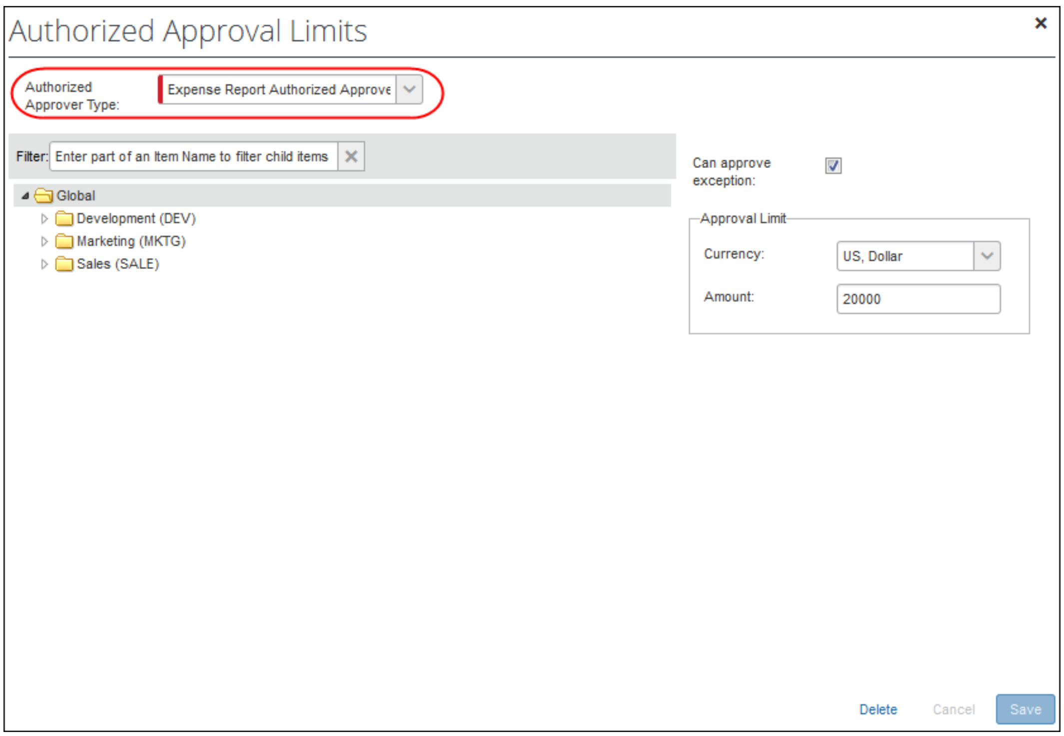
When you select the check box, the **Manager Approval Limit** field and the **Approval Limit Currency** list appear. Make the appropriate choices and click **Save**.

NOTE: This method can be used only for limit-based authorized approvers. It cannot be used for exception-based authorized approvers.

- **Authorized Approval Limits** link



When you click the link, the **Authorized Approval Limits** window appears.



On the left side, select the appropriate level in the hierarchy.

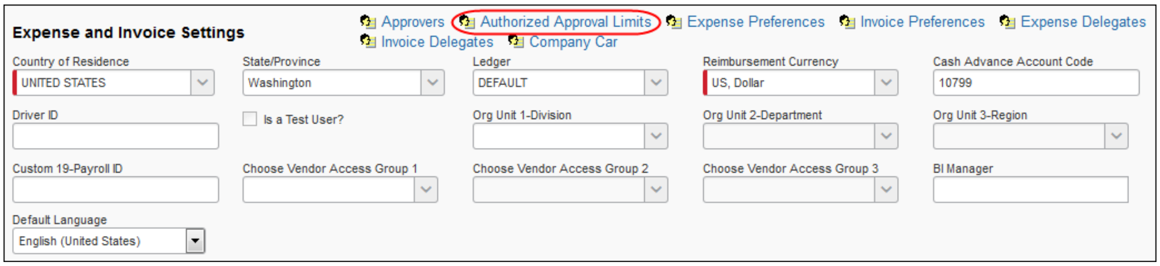
On the right side:

- For exception-based approvers, select (enable) the **Can approve exception** check box. (The actual exception levels are defined on the **Authorized Approvers** tab in Workflows.)
- For limit-based approvers, select the desired currency and enter the amount.
- If an approver has both types of approval authority, define both.

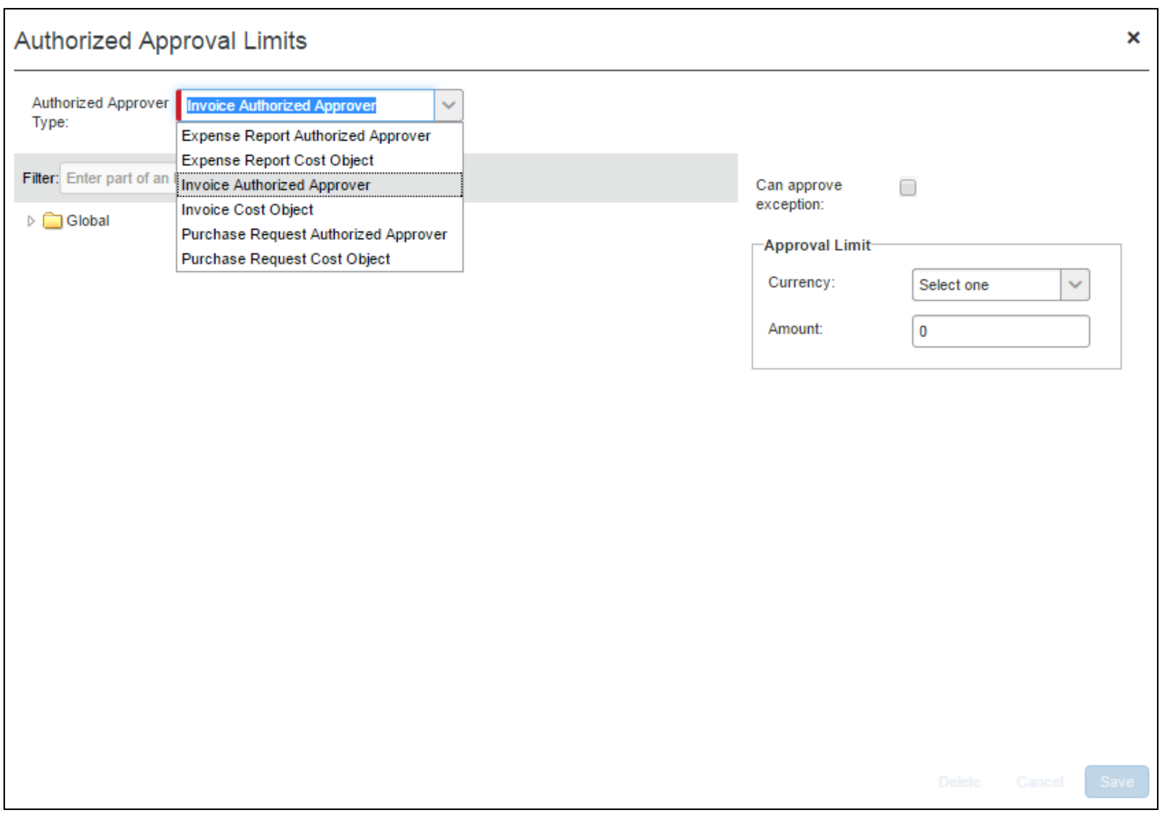
Expense Cost Object Approvers

> ! **IMPORTANT:** In order to see the link described below, the user must have the User Admin rights ***and*** the Expense Admin rights; the employee must have the standard approver role.

If the Cost Object Approver feature is activated, the **Authorized Approval Limits** link appears.



When you click the link, the **Authorized Approval Limits** window appears.



On the left side, select the appropriate level in the hierarchy.

On the right side:

- For limit-based cost object approval, select a currency and enters an amount.
- For level-based cost object approval, enter a level.

NOTE: The cost object configuration defines the type – either limit or level. If you complete both areas in this window – the **Approval Limit** area and the **Level** field – Expense will use the one that applies to your configuration and ignore the other.

Add Invoice/Purchase Request Authorized Approvers or Cost Object Approvers

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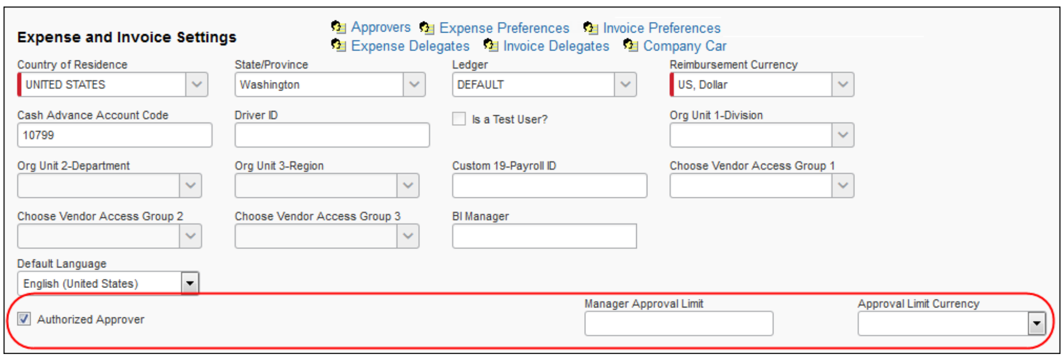
! **IMPORTANT:** In order to see the check box or link described below, the user must have the User Admin rights ***and*** the Invoice Admin rights; the employee must have the standard approver role.

INVOICE/PURCHASE REQUEST AUTHORIZED APPROVER

If a company uses the authorized approver feature in Invoice, based on the company's configuration, the company will see one of these methods - never both.

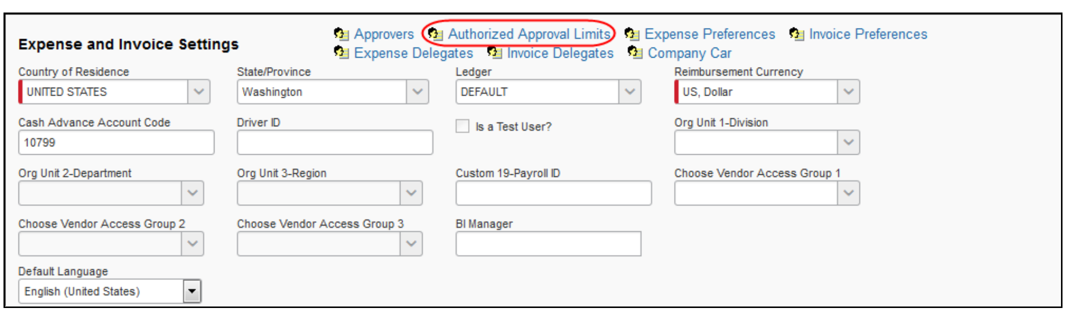
- **Authorized Approver** check box



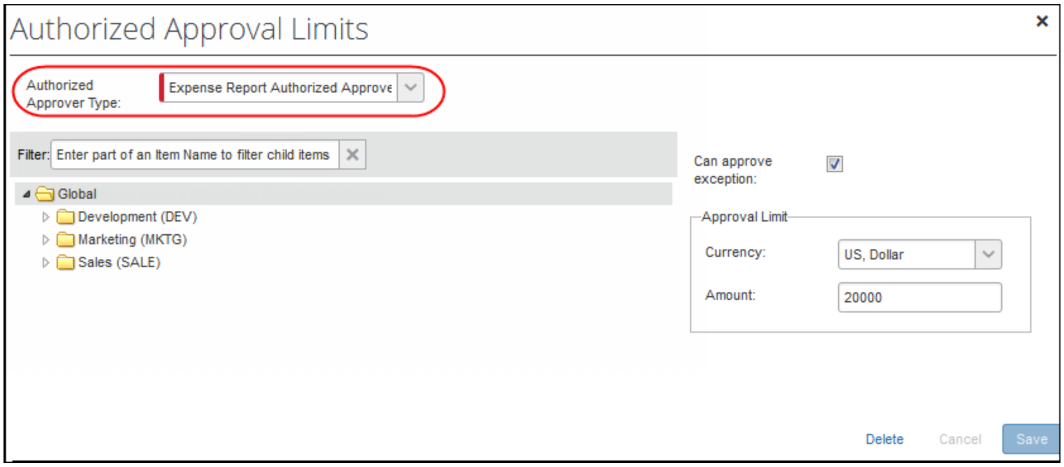
When you select the check box, the **Manager Approval Limit** field and the **Approval Limit Currency** list appear. Make the appropriate choices and click **Save**.

NOTE: This method can be used only for limit-based authorized approvers. It cannot be used for exception-based authorized approvers.

- **Authorized Approval Limits** link



When you click the link, the **Authorized Approval Limits** window appears.



On the left side, select the appropriate level in the hierarchy.

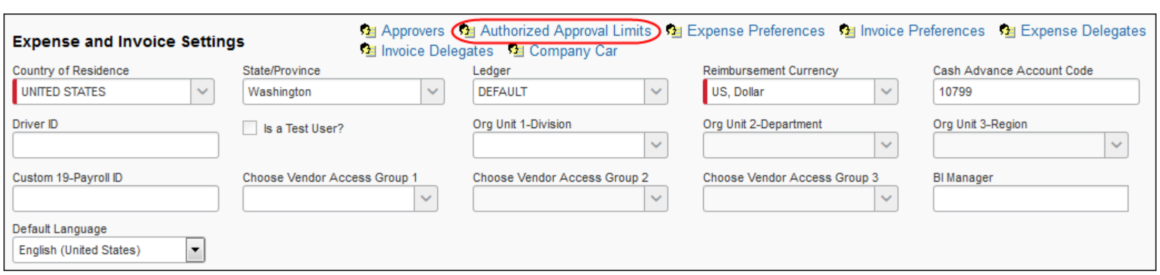
On the right side:

- For exception-based approvers, select (enable) the **Can approve exception** check box. (The actual exception levels are defined on the **Authorized Approvers** tab in Workflows.)
- For limit-based approvers, select the desired currency and enter the amount.
- If an approver has both types of approval authority, define both.

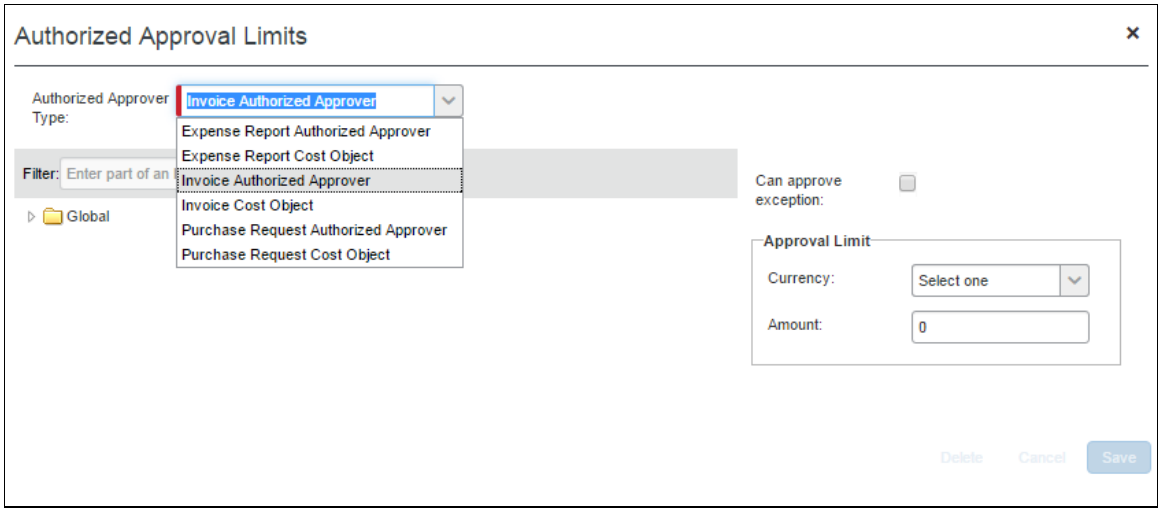
INVOICE/PURCHASE REQUEST COST OBJECT APPROVERS

! **IMPORTANT:** In order to see the link described below, the user must have the User Admin rights ***and*** the Expense/Invoice Admin rights; the employee must have the standard approver role.

If the Cost Object Approver feature is activated, the **Authorized Approval Limits** link appears.



When you click the link, the **Authorized Approval Limits** window appears.



On the left side, select the appropriate level in the hierarchy.

On the right side:

- For limit-based cost object approval, select a currency and enters an amount.
- For level-based cost object approval, enter a level.

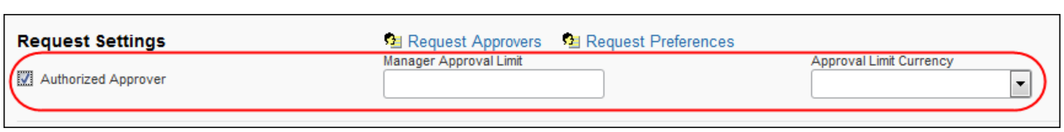
NOTE: The cost object configuration defines the type – either limit or level. If you complete both areas in this window – the **Approval Limit** area and the **Level** field – Invoice will use the one that applies to your configuration and ignore the other.

Add Request Authorized Approvers

! **IMPORTANT:** In order to see the check box or link described below, the user must have the User Admin rights ***and*** the Expense Admin rights; the employee must have the standard Request approver role.

If a company uses the authorized approver feature in Request, based on the company's configuration, the company will see one of these methods - never both.

- **Authorized Approver** check box

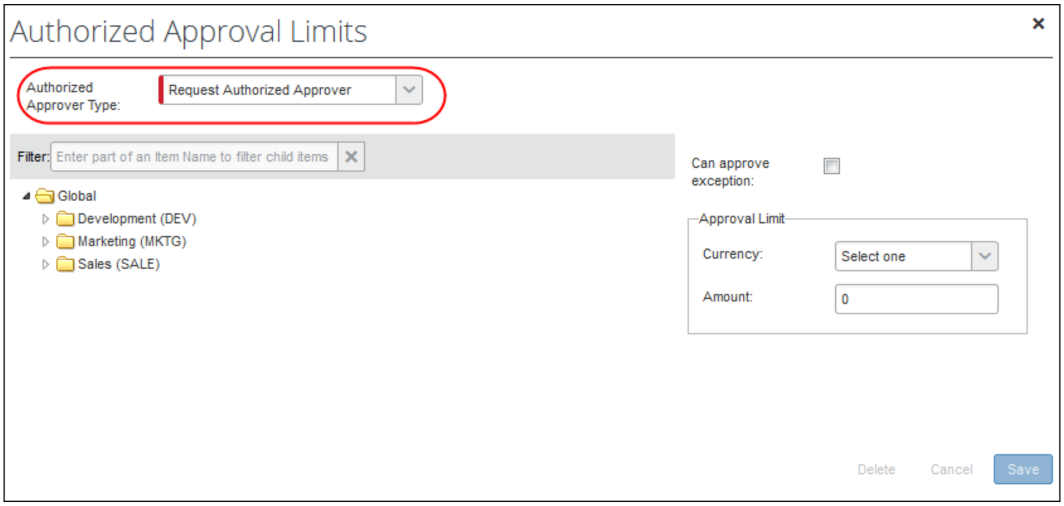


When you select the check box, the **Manager Approval Limit** field and the **Approval Limit Currency** list appear. Make the appropriate choices and click **Save**.

NOTE: This method can be used only for limit-based authorized approvers. It cannot be used for exception-based authorized approvers.

- **Authorized Approval Limits** link

When you click the link, the **Authorized Approval Limits** window appears.



On the left side, select the appropriate level in the hierarchy.

On the right side:

- For exception-based approvers, select (enable) the **Can approve exception** check box. (The actual exception levels are defined on the **Authorized Approvers** tab in Workflows.)
- For limit-based approvers, select the desired currency and enter the amount.
- If an approver has both types of approval authority, define both.

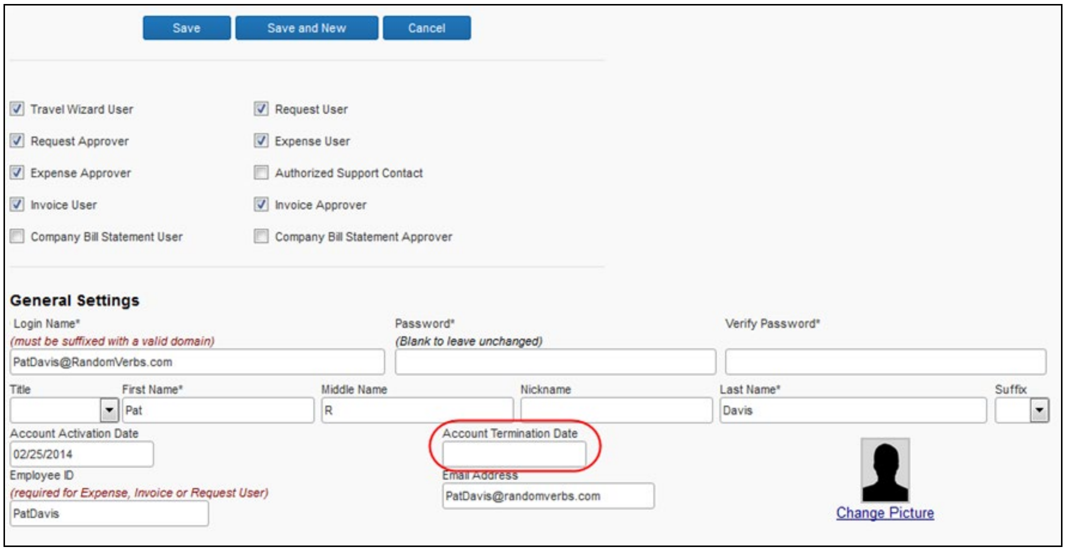
Reactivating a User

The administrator can activate a user that was previously deactivated on the User Details page. There are two common requirements:

- The existing user account needs to be reactivated. This means this employee will have one user account in Travel & Expense.
- A new user account needs to be created, using the original login and email address but keeping the original, now deactivated user. This means this employee will have two user accounts in Travel & Expense.

▸ *To reactivate a user account:*

1. On the user administration page, locate the desired user.



NOTE: The role check boxes (Expense User, Invoice Approver, etc.) may be hidden to prevent assignment by the administrator – consult your SAP Concur administrator for more information.

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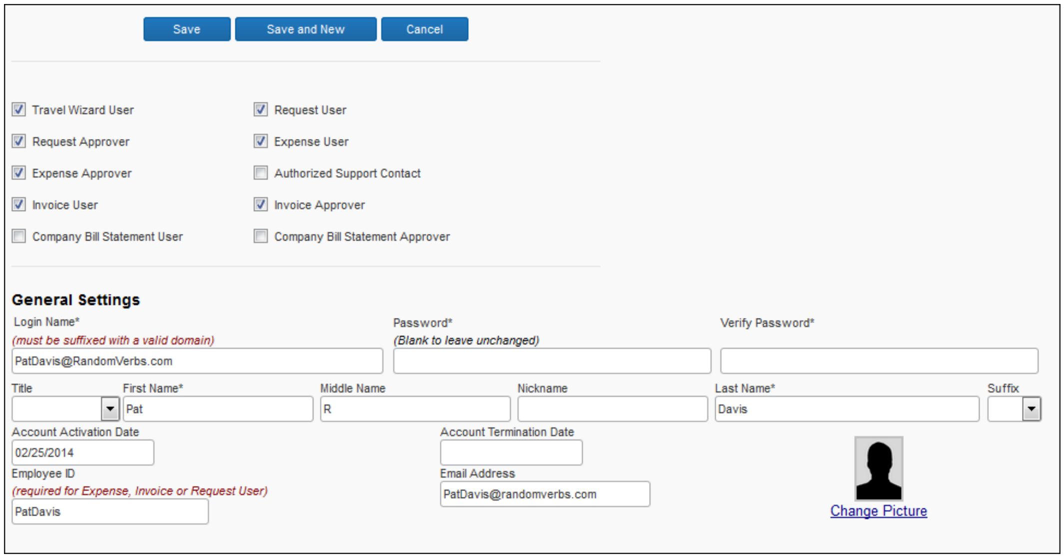
2. Clear the **Account Termination Date** field.

A process runs during the Overnight Processing Period that will activate the user. The user will be able to log in after the process has run.

NOTE: You cannot use the Concur Standard Employee Import to reactivate a terminated user. Reactivation must be done using the User Administration tool. Attempting to reactivate an employee using the Concur Standard Import where the imported employee has the same Login ID or Email address as an existing terminated user will result in a failure in the import process. Once you reactivate the employee using the User Administration tool, you may use the Concur Standard Employee Import to make updates to the user's information.

To create a new user account using the same login and email:

1. On the user administration page, locate the desired user.



NOTE: The role check boxes (Expense User, Invoice Approver, etc.) may be hidden to prevent assignment by the administrator – consult your SAP Concur administrator for more information.

2. Change the value in the **Login Name** field.

NOTE: The login name must be unique across all SAP Concur products. If a login name is currently in use in any SAP Concur product, it cannot be assigned again unless the original occurrence is changed. For example, assume that a login name was assigned in error. That login name can only be used again if an admin (either manually or via import) renames the original occurrence, allowing the login name to be used again.

3. Change the value in the **Email Address** field to match.

4. Click **Save**.

5. Create a new user with the desired Login and Email by following the steps in the *Adding New Users* section of this guide.

Refer to the *Shared: Employee Import Specification*.

Section 5: User Permissions

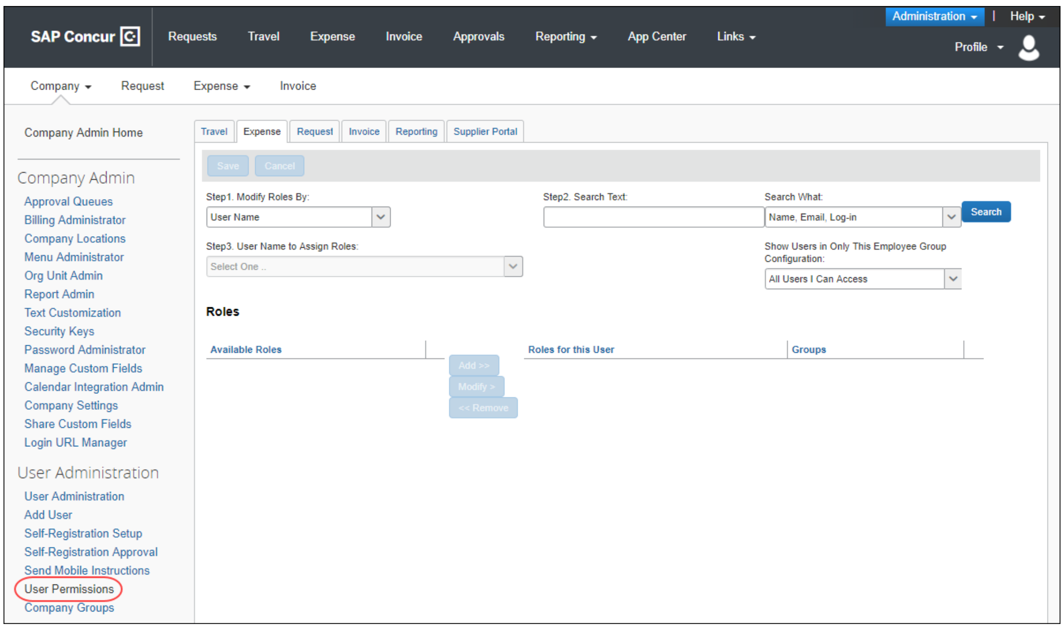
The User Administrator can assign basic user permissions using the User Role check boxes on the user details page. The administrator can assign the full list of permissions using the user permissions page.

Accessing the User Permissions Page

The user permissions page displays tabs for all configured SAP Concur products, such as Travel, Expense, or Invoice.

To access the user permissions page:

1. Click **Administration > Company > Company Admin**.
2. In the left menu, click **User Permissions**.

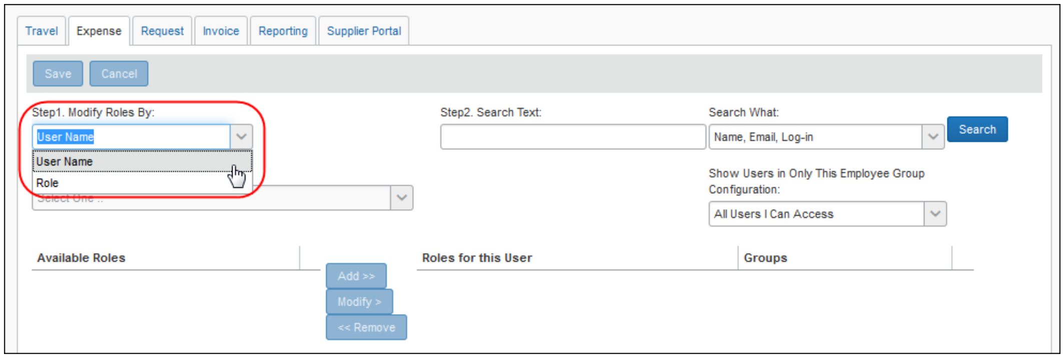


Managing Roles by User Name

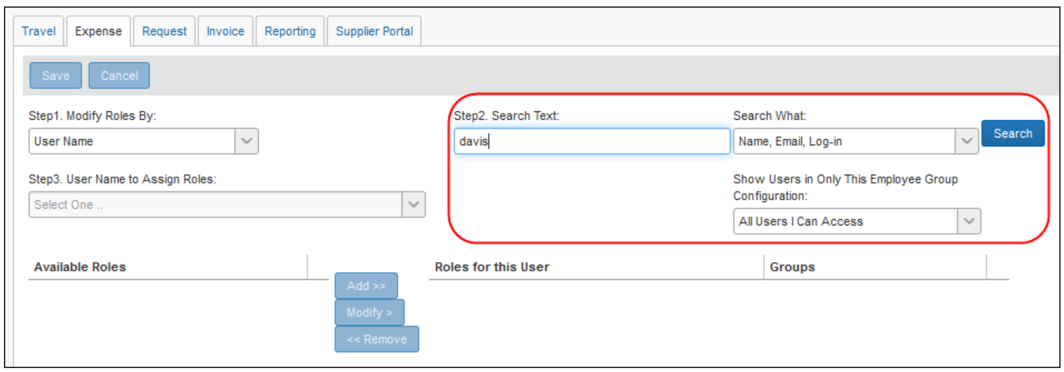
The Permissions administrator can select users by name, then assign or remove the available roles.

To add a role by user name:

1. On the user permissions page, in the **Modify Roles By** list, select *User Name*.



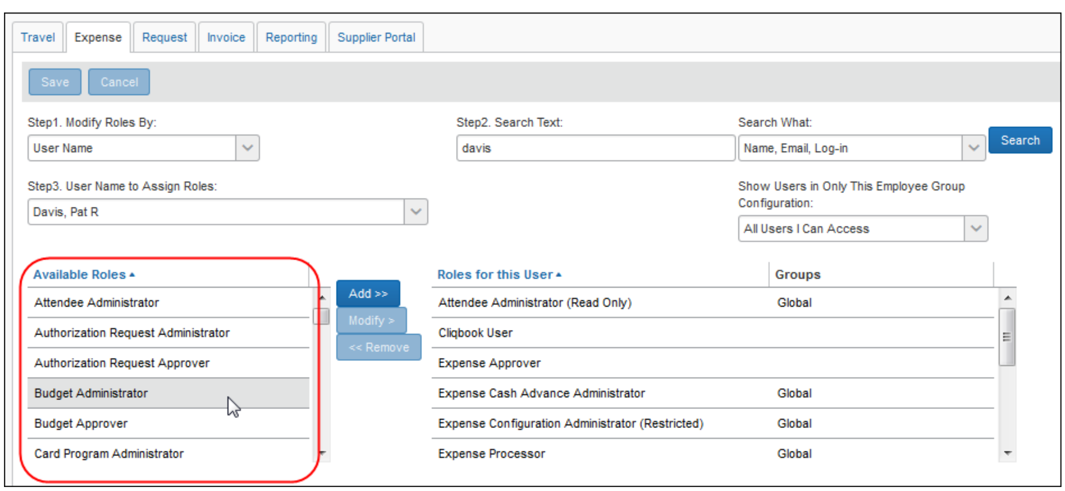
2. In the **Search** area, enter the desired user's information. Entering one letter will cause the system to search for data in the selected fields that start with that letter. Entering a comma separated list will search for any value in the list.



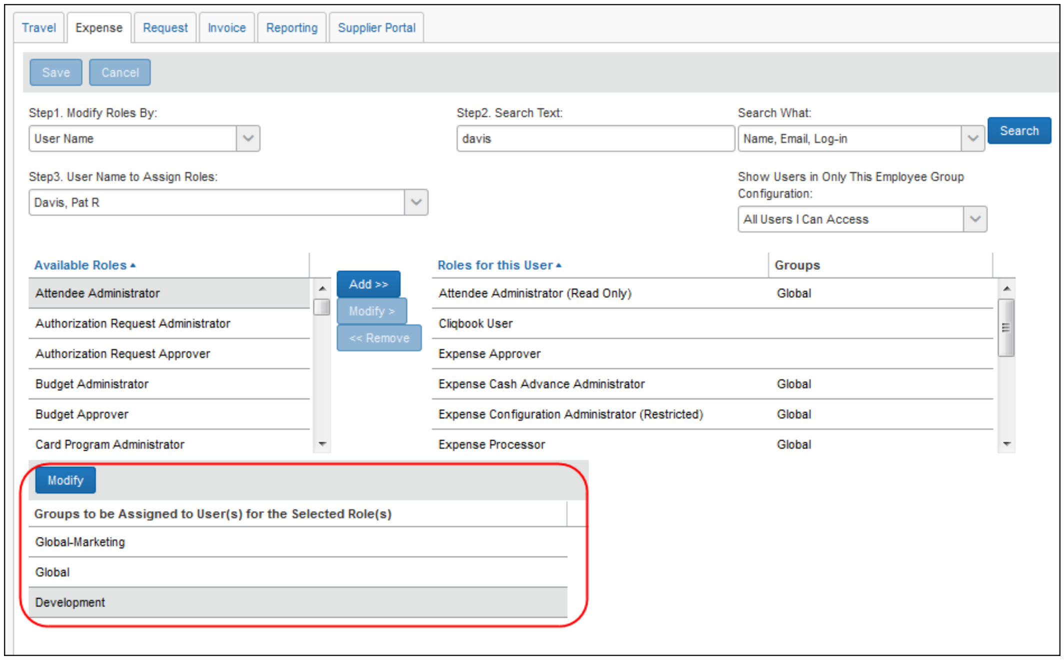
3. Click **Search**.

4. In the **User Name to Assign Roles** field, select the desired user (if there is more than one).

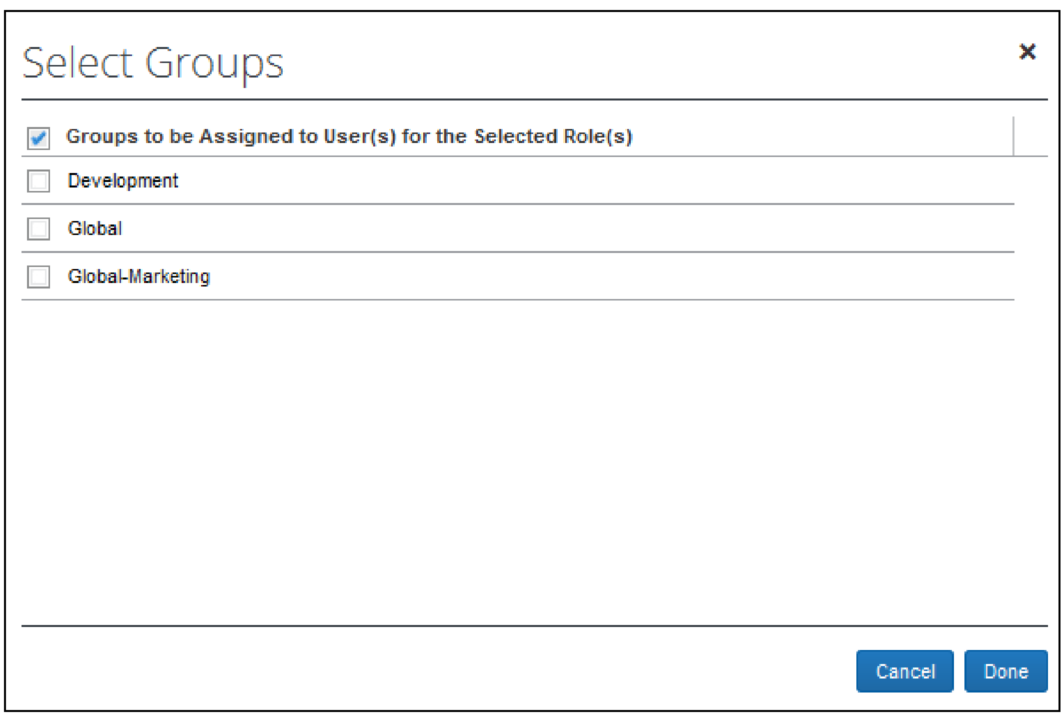
5. Select the desired role(s) in the **Available Roles** field. You can select more than one non-group aware role to assign. Only one group aware role can be assigned at a time.



6. If the role is group-aware then the **Groups to be Assigned to User(s) for the Selected Role(s)** list appears.



The list defaults with the Global group configuration name. If want to modify this, click **Modify** in the Groups area to select the group that the role applies to. The **Select Groups** window appears.

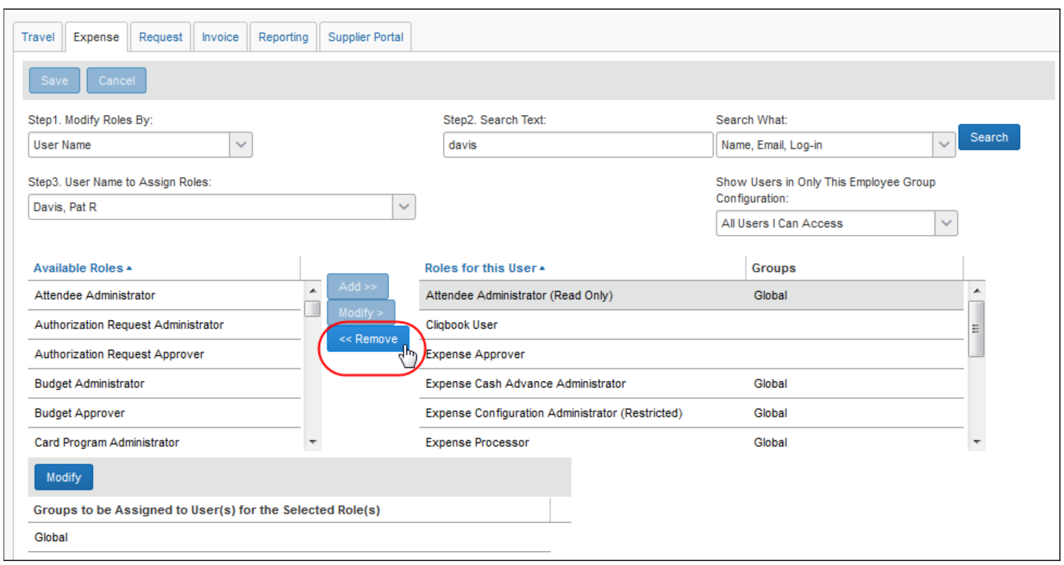


It lists available group configuration names that can be applied to the role. The group configuration can include one or more groups that use the configuration. It is the group configuration that actually controls what groups this role applies to.

7. Select the desired group configuration name.
8. Click **Done**.
9. Click **Add** to assign the role(s) to the user.

To remove a role by user name:

1. On the user permissions page, in the **Modify Roles By** list, select *User Name*.
2. In the **Search** area, enter the desired user's information. Entering one letter will cause the system to search for data in the selected fields that start with that letter. Entering a comma separated list will search for any value in the list.
3. Click **Search**. This populates the **User Name to Assign Roles** field.
4. In the **User Name to Assign Roles** field, select the desired user.
5. Select the desired role in the **Roles for This User** field.

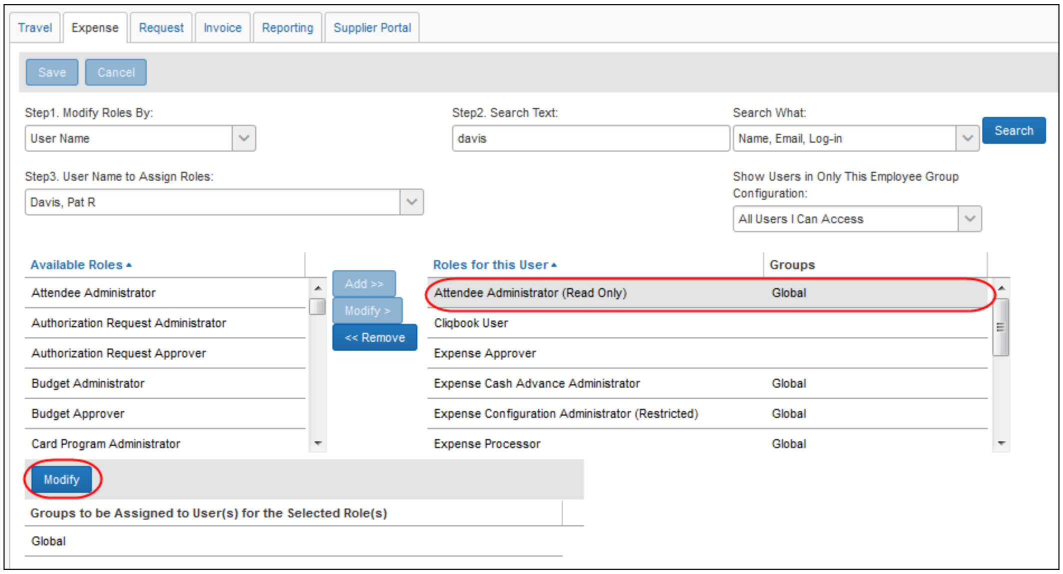


6. Click **Remove** to remove the role from the user.

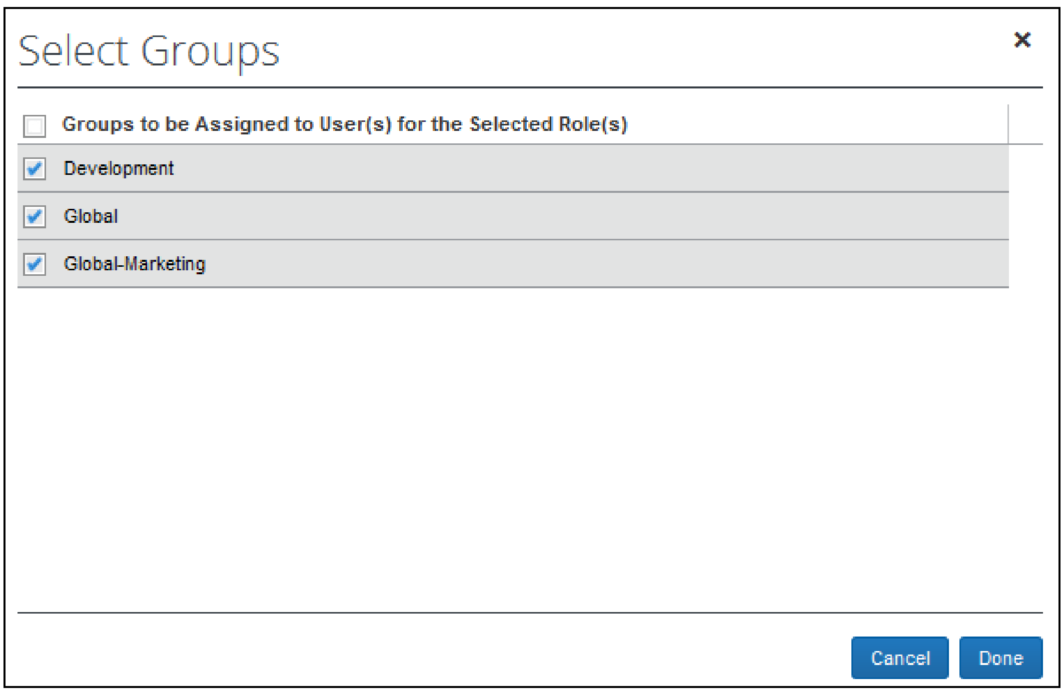
To change the group assignment for a role:

The administrator can change the groups that a role is assigned, without removing the role.

1. In the user permissions section, select the desired role.



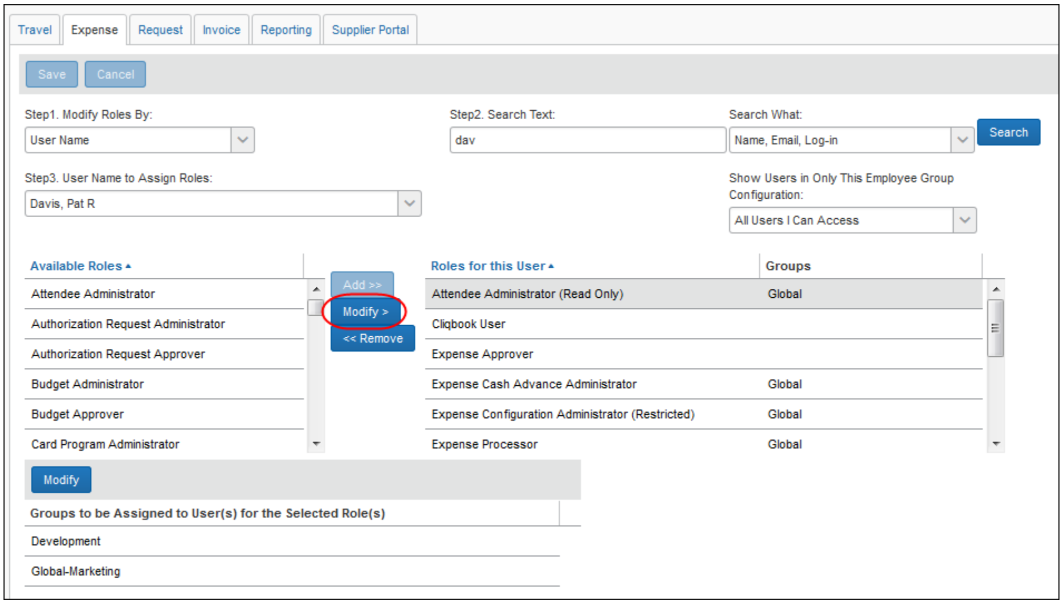
2. Click **Modify** in the groups area. The group selection window appears:



3. Select the appropriate groups.

4. Click **Done**.

5. Click **Modify**.



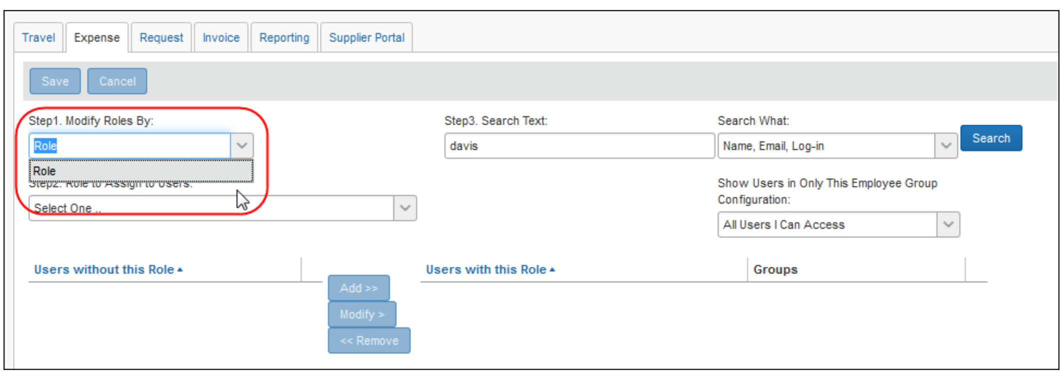
6. Click **Save**.

Managing Roles by Role

The Permissions administrator can select roles by name, view all users with the role, and assign users to the role.

► *To add a role by role:*

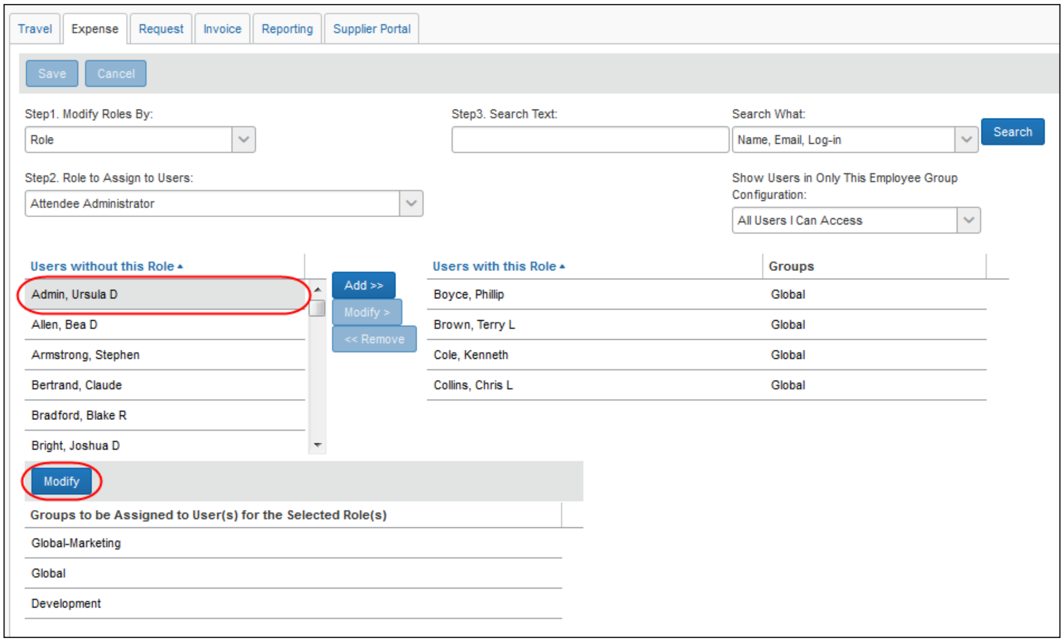
1. In the user permissions section, in the **Modify Roles By** list, select *Role*.



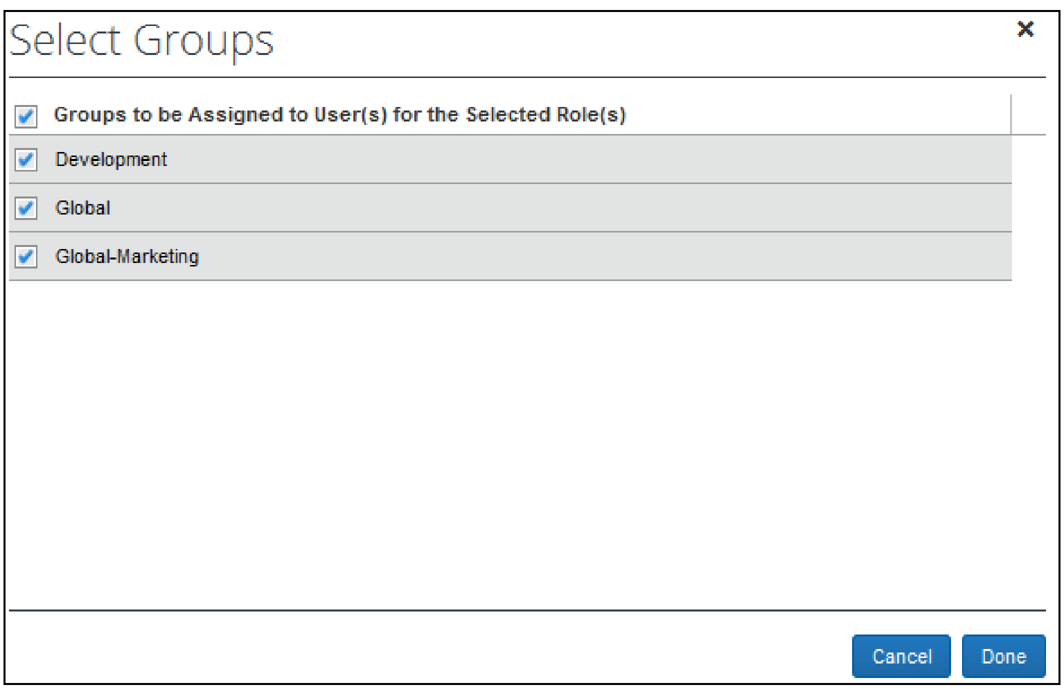
2. In the **Role to Assign to Users** area, select the desired role.

3. Click **Search**. The **Users without this Role** and **Users with this Role** fields are populated.

4. Select the desired user(s) in the **Users without this Role** field. More than one user can be selected when assigning the role.



5. If the role is group-aware then the **Groups to be assigned to User(s) for the Selected Role(s)** list appears. The list defaults with the Global group configuration name. If want to modify this, click **Modify** in the Groups area to select the group that the role applies to. The **Select Groups** window appears. It lists available group configuration names that can be applied to the role. The group configuration name can include one or more groups that use the configuration. It is the group configuration that actually controls what groups this role applies to.



6. Select the desired group configuration name.

7. Click **Done**.

8. Click **Add** to assign the role to the user.

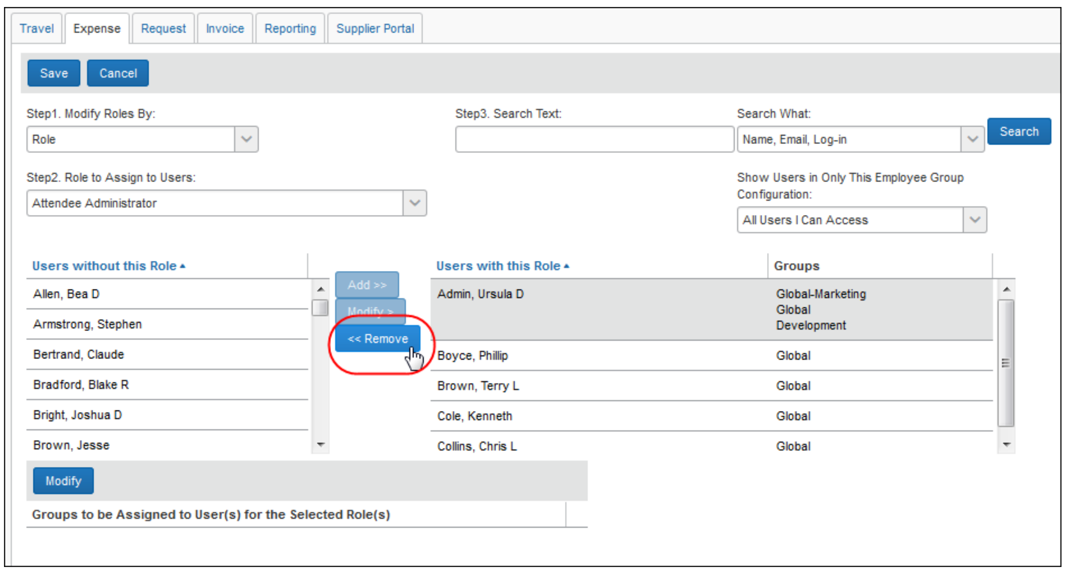
To remove a role by role:

1. In the user permissions section, in the **Modify Roles By** list, select *Role*.

2. In the **Role to Assign to Users** field, select the desired role.

3. Click **Search**. The **Users without this Role** and **Users with this Role** fields are populated.

4. Select the desired user in the **Users with this Role** field.

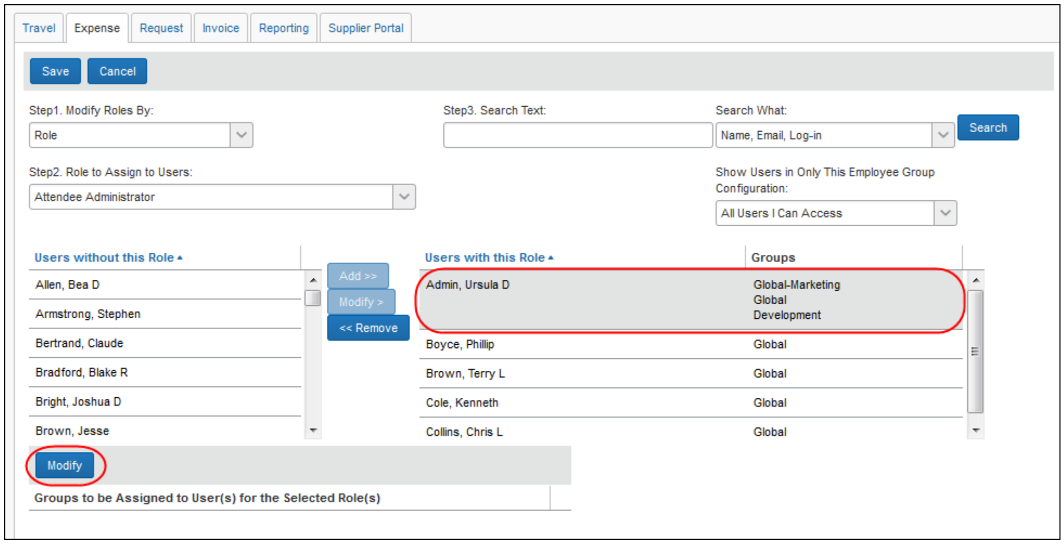


5. Click **Remove** to remove the role from the user.

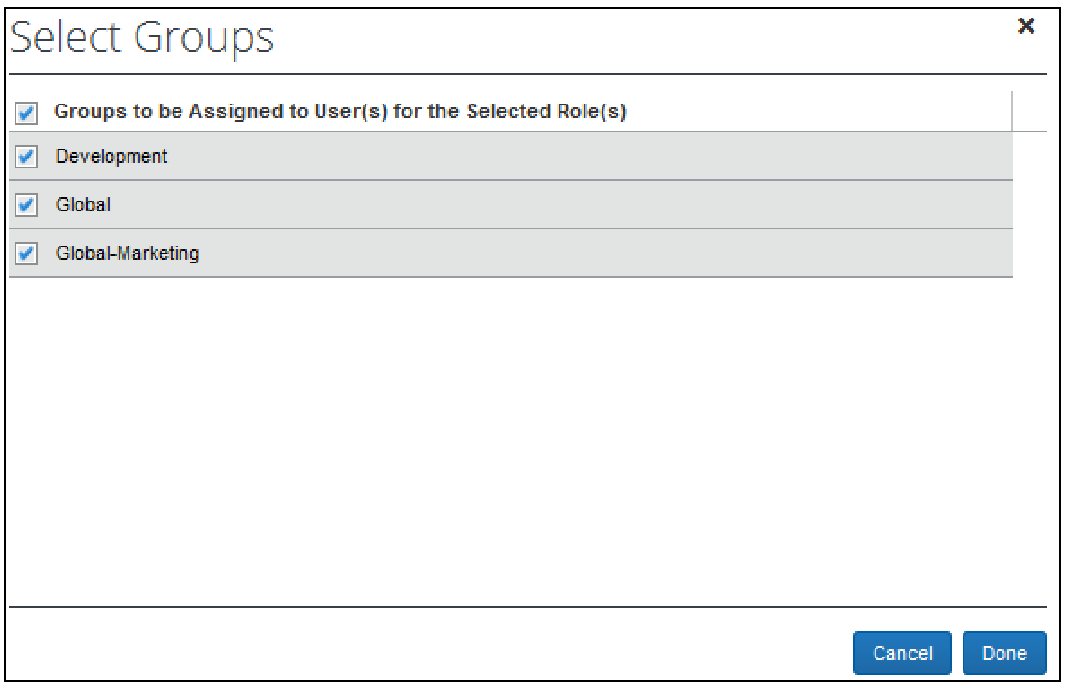
To change the group assignment for a role:

The administrator can change the groups that a role is assigned, without removing the role.

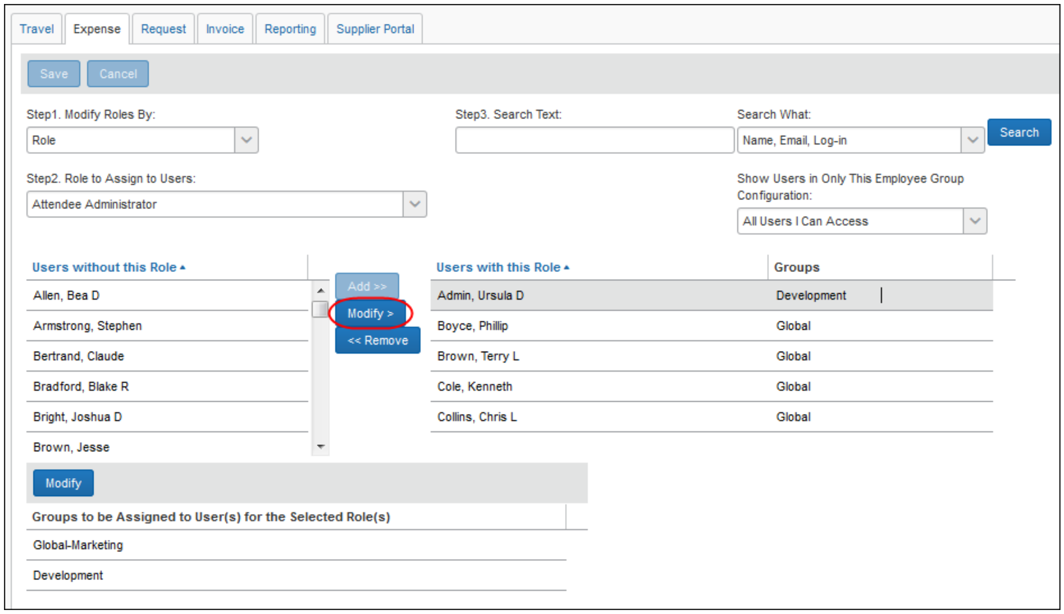
1. In the user permissions section, select the desired user.



2. Click **Modify** in the groups area. The **Select Groups** window appears:



3. Select the appropriate groups.
4. Click **Done.**
5. Click **Modify**.



6. Click **Save**.

Section 6: Viewing a History of Changes Made to an Employee

Reporting on User Changes

Changes to user details and roles are logged and reportable. You can view the history of changes through reports created in Analysis.

- To view user detail changes, create a report using the fields in the **Expense > Lists >** Travel Employee History table.
- To view user role changes, create a report using the fields in the **Expense > Lists >** Employee Role History table.

Refer to the *Data Model - Expense Folder* chapter of the Analysis/Intelligence guide for more details.

Viewing a Report Detailing Changes Made to an Employee

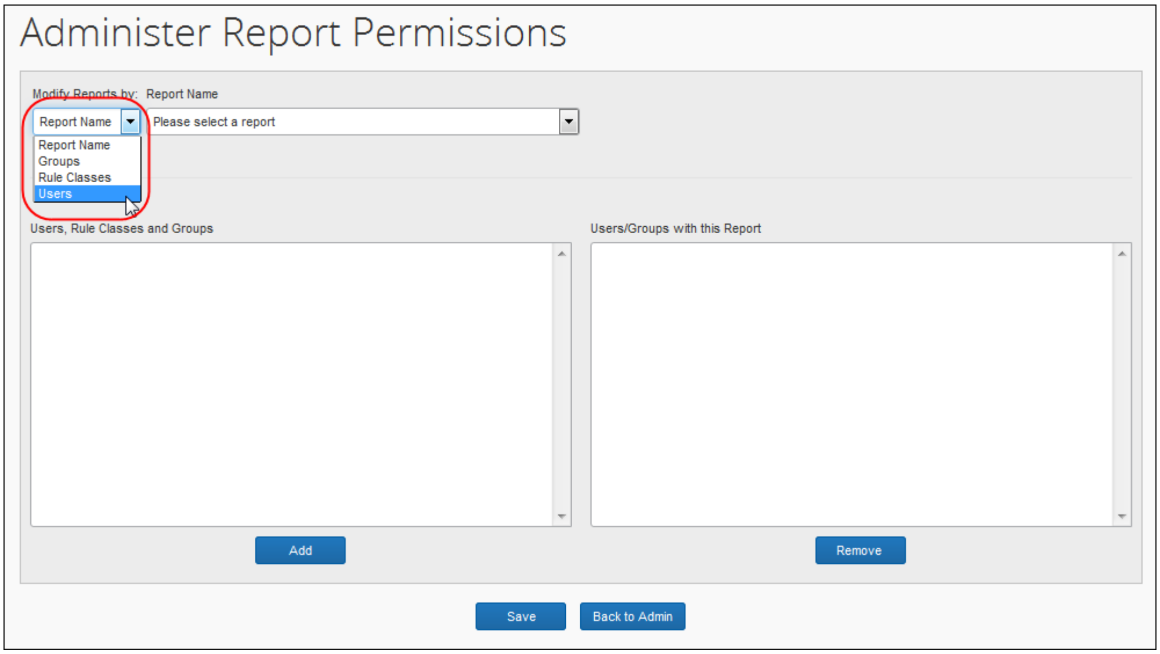
Changes made to a user, such as password changes or similar, are available by running a report in Travel. This option is only available to clients using the integrated Travel and Expense solution because it requires administrative access within Travel to assign, run, and view the reports.

These reports are available:

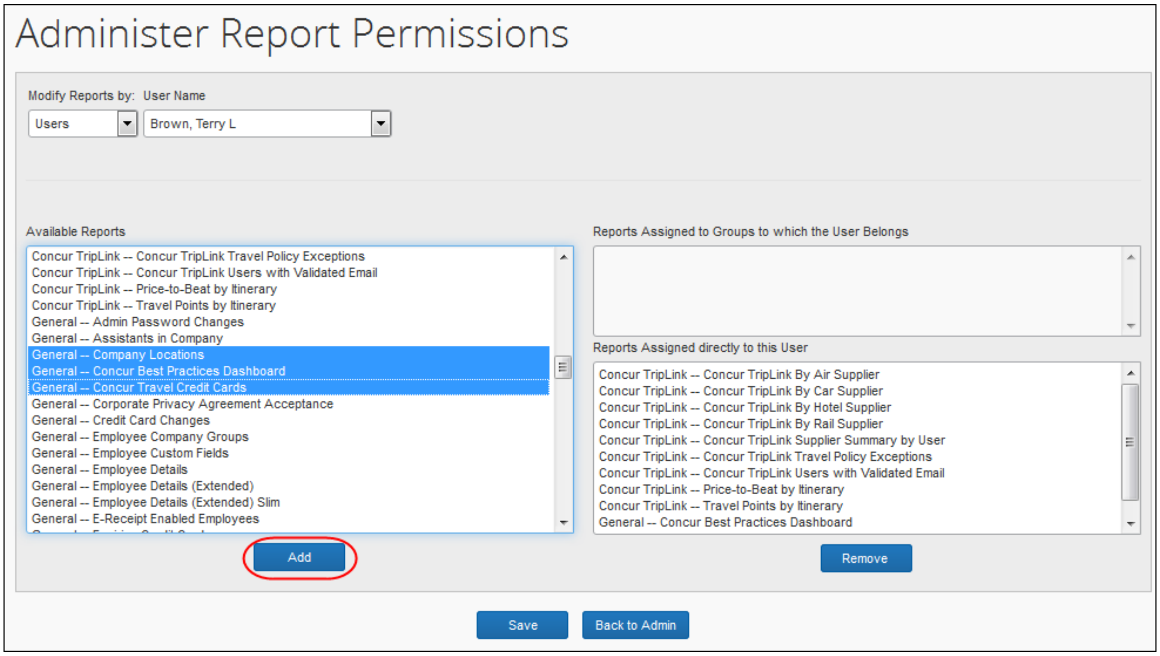
- **User Profile Changes Version 2:** Detailed report of changes made at the Profile level
- **User Preference Changes Version 2:** Detailed report of changes made at the Profile level

Assigning and Running the Reports for Display

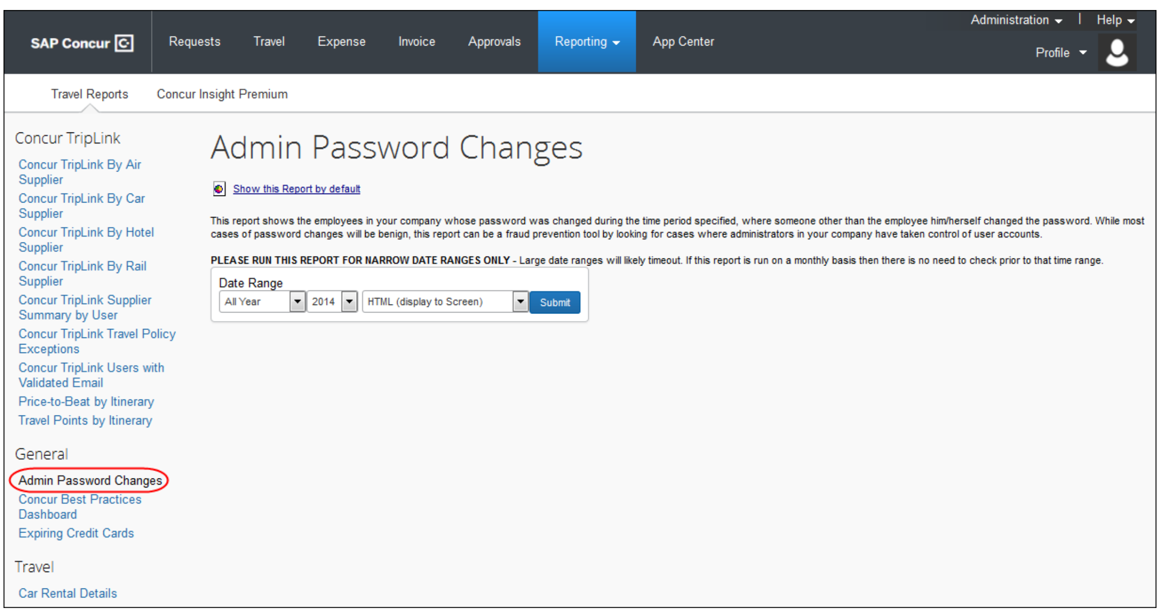
To assign the report, the Travel Report Admin role navigates to **Administration** > **Company** > **Report Admin**. They then select how the reports are assigned - via the report, specific to a single user, or in bulk by Group.



In the figure below, the user is selected, and reports assigned to them using the **Add** button:

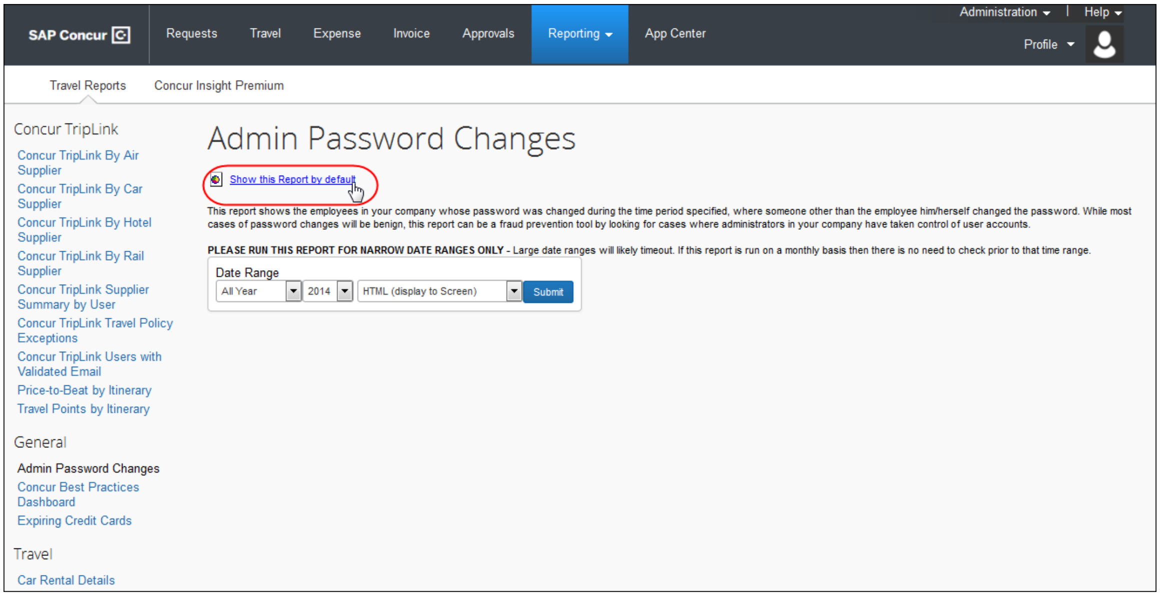


The user assigned the reports may now run them by navigating to **Reporting > Travel Reports** and selecting a report to run. In the figure below, the *Admin Password Changes* report is selected:



Setting the Default Report View

Open a report and click **Show this Report by default** to force the next display to automatically open to the selected report. In the figure below, the *Admin Password Changes* report is selected for automatic display:



Section 7: Special Cases

This section covers information about special situations.

When a Payee is Terminated During the Reimbursement Process

When a payee is terminated and has outstanding expense reports:

- A user with the Expense Proxy Logon role should submit any unsubmitted expense reports for the employee.
- The employee should be marked **Inactive** in User Administration.
- Expense Pay will process the payment demands normally.