# Concur Expense: File Export Configuration

## Setup Guide

### Last Revised: July 8 2016

Applies to these SAP Concur solutions:

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

# Table of Contents

# Revision History

| Date | Notes / Comments / Changes |
|---|---|
| January 21, 2022 | Updated the copyright year; no other changes; cover date not updated |
| April 9, 2020 | Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated |
| January 2, 2020 | Updated the copyright; no other changes; cover date not updated |
| January 4, 2019 | Updated the copyright; no other changes; cover date not updated |
| April 4 2018 | Changed the check boxes on the front cover; no other changes; cover date not updated |
| January 5 2018 | Updated the copyright; no other changes; cover date not updated |
| December 14 2016 | Changed copyright and cover; no other content changes. |
| July 8 2016 | Remove incorrect text stating clients implemented from June 2014 or later will have access to this feature from the Restricted Access section |
| May 13 2016 | Updated instances of he/she to they. |
| August 14 2015 | Updated the screen shots to the enhanced UI; no other content changes. |
| November 14 2014 | Added information about which clients see this feature. |
| October 17 2014 | New document. |

# File Export Configuration

**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 Concur administrator.

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

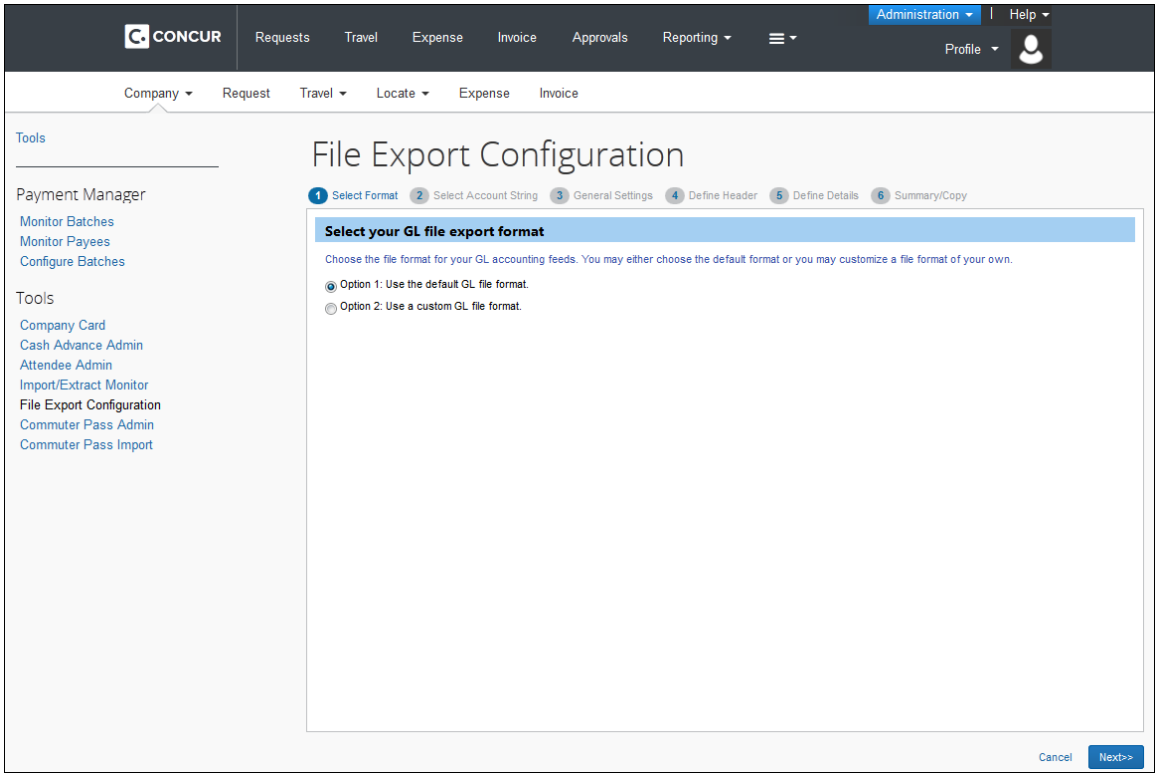
## Section 2: Two Guides

There are two guides related to the File Export Configuration tool:

- This guide: Describes how to ***enable*** the tool
- *Expense: File Export Configuration User Guide:* Describes how to ***use*** the tool

## Section 3: Overview

The File Export Configuration tool is used by the client to customize the format and output of the Standard Accounting Extract (SAE) that the client receives when the client closes batches in Payment Manager.




## Restricted Access

The File Export Configuration tool is available ***only*** to Professional/Premium clients who migrated from a Standard entity to a Professional entity. If they do not have access to this tool, they did not migrate to their Professional product offering and the **File Export Configuration** link will not appear for them.

## Required Role

The user must be assigned the Extract Administrator role in order to access the File Export Configuration tool.

# Section 4: Enabling the Tool and Role

***The Extract Administrator role is made available only by Concur's Implementation team*** (via the *Enable Configurable Extract* HMC setting).

Once Implementation sets the HMC setting, the role becomes available for the client's User Admin to assign in User Permissions. Once assigned, it gives the assignee access to the File Export Configuration tool in Expense Tools.