Shared: Company Info

User Guide

Last Revised: August 10, 2019

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
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
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
August 10, 2019	Added a note to the description of the Headline field indicating that use of HTML is no longer supported.
February 12, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 26 2018	Updated the copyright; no other changes; cover date not updated
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.
July 28 2015	Clarify that Start Date and End Date values are Eastern Time Zone (ET)
April 10 2015	Removed references to the current UI; no other content changes
October 10 2014	Added information about the two user interfaces; no other content changes
March 7 2014	Invoice product now uses the **Applies To** field functionality to separate information by an employee’s group relationship
January 17 2014	Added information about the **Applies To** field
December 28 2012	Made rebranding and/or copyright changes; no content changes
February 2012	Changed copyright; no content change
August 12 2011	Added information about sort order and icons
July 22 2011	Changed administrator role name to Company Info Administrator.
December 31 2010	Updated the copyright and made rebranding changes; no content changes
December 11 2009	Changed to stand-alone setup guide; no content change
August 14 2009	**Expense Info** (on My Concur) changed to **Company Info**
June 19 2009	**Active Reports** (on My Concur) changed to **Active Work**
September 25 2008	Changed the format slightly. Since there are no changes to content, the revision date has not changed.
Apr 2008 (SU30)	New Document.

Company Info

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.

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

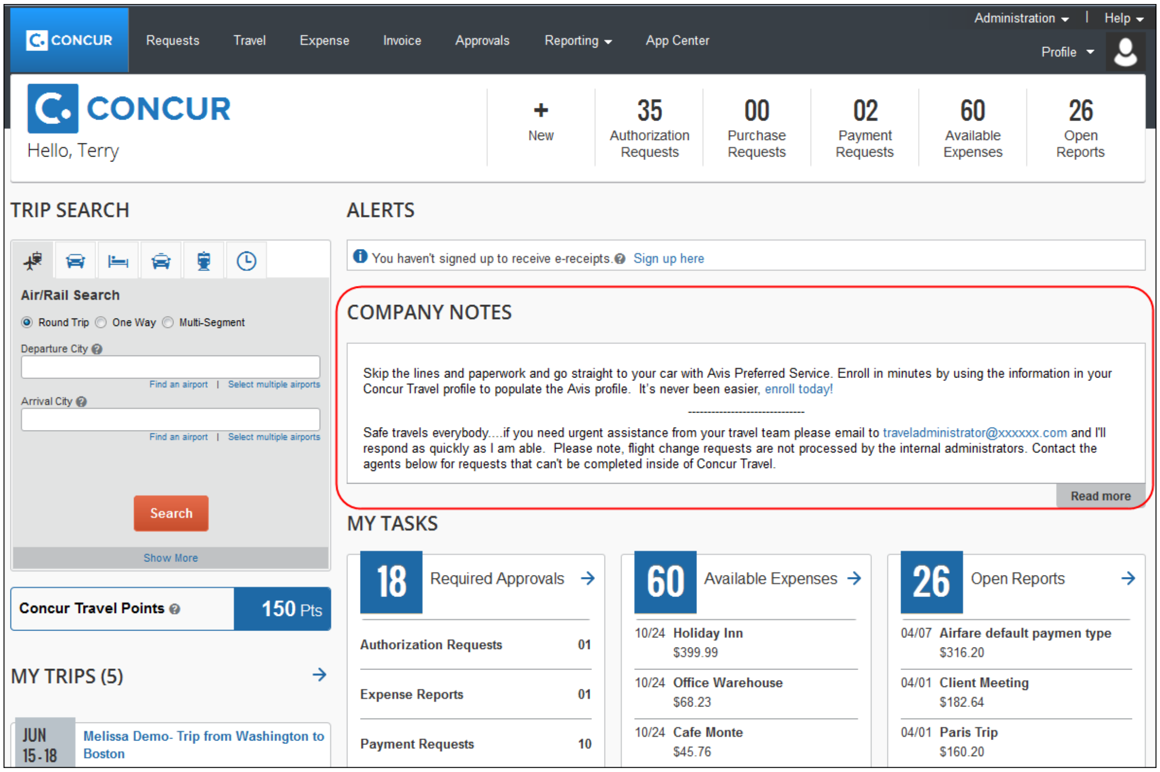
Section 2: Overview

The Company Info feature can be used to broadcast information via the Company Notes section of the home page. This information can include links to other applications (such as a company intranet site or local traffic), "How To" information for Concur users, or links to external documents.

The admin can configure a message to be broadcast company-wide or a message can be restricted to one or more groups – targeting the appropriate audience for each message.

What the User Sees

The message displays in the **Company Notes** area of the home page. The user sees the messages configured for their group and the messages that are configured to be seen company-wide.



Section 3: Procedures

Permissions/Roles

Any user assigned the Company Info Administrator role (**Administration** > **Company** > **Company Admin** > **User Permissions**) can create and post Company Info messages. This user is given all of the necessary rights to create and maintain Company Info messages.

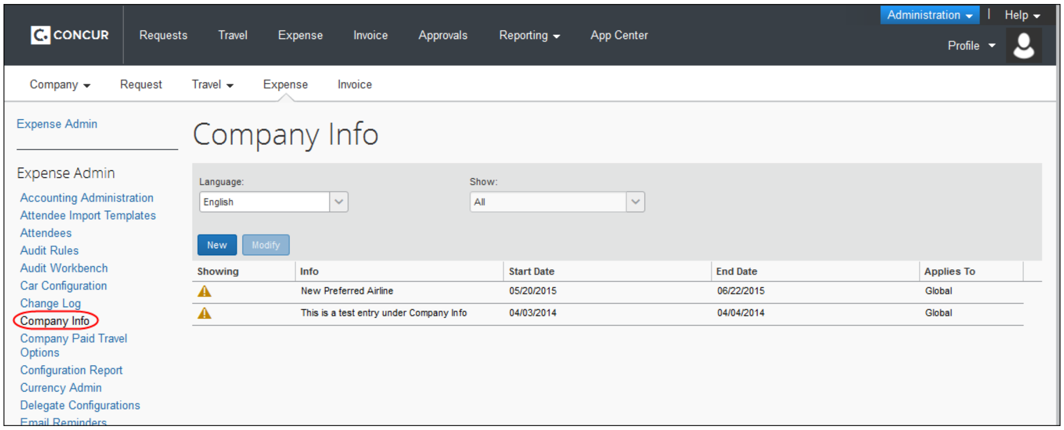
Note the following:

- The Company Info Administrator role is available on the **Expense**, **Request**, and **Invoice** tab in User Permissions.
- The Company Info Administrator permission is global. When creating or editing messages, the admin can define the desired groups.

Accessing Company Info

To access Company Info:

1. Click **Administration** > **Expense** (or **Invoice** or **Request**).
2. Click **Company Info** (left menu). The **Company Info** page appears.



On this page, you can add and modify messages ***and***:

- Use the **Show** list to view all items or the current and future items.
- Use the **Language** list to display the messages by language.
- Click the column heading to sort the column.

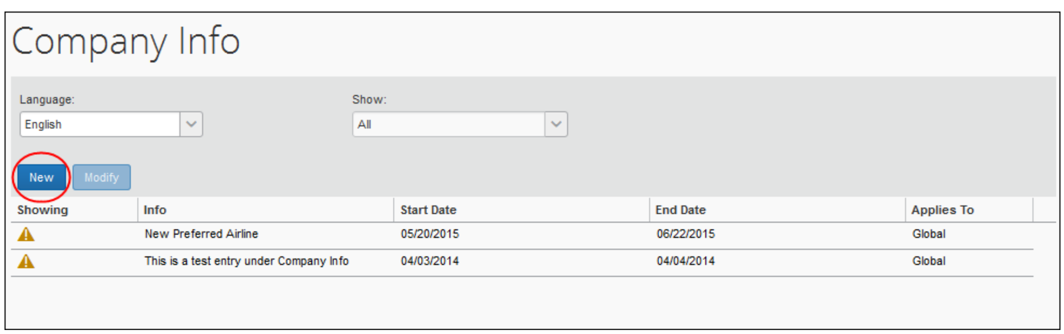
Refer to *Information about Sorting, Icons, and Display* in this guide for additional information.

Adding Company Info

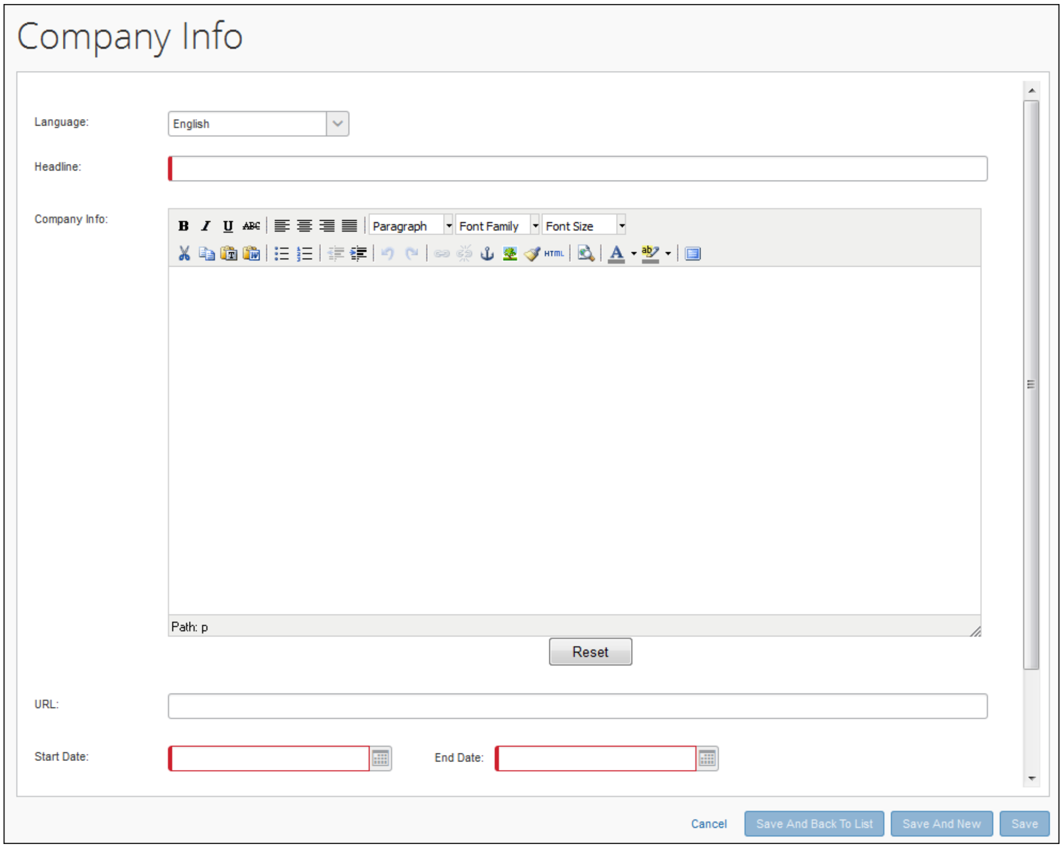
The Company Info administrator can add any number of Company Info items.

To add Company Info:

1. On the **Company Info** page, click **New**.



This page appears.



2. Complete the appropriate fields.

Field	Description
Language	Click the desired language.
Headline	Required. Enter the text that should appear as the title for the info item. This is a required field and cannot exceed 255 characters. **NOTE:** This field will not execute HTML.
Company Info	Required. Enter the full text of the Company Info item here. This can contain plain text or HTML characters. Use the editing tools provided to change the item's style. This field cannot exceed 2000 characters. **NOTE:** The Company Info item will appear on the home page exactly as shown here. The item cannot be minimized.
URL	Enter the absolute full path address for the Web page that is to be accessed when the link is clicked. For example, http://www.<companyname>.com. If a URL is entered, the headline text will automatically become a hyperlink that launches a new browser window when clicked. This field cannot exceed 255 characters. **NOTE:** The URL does not have to be entered, since the **Company Info** field can contain the entire announcement. For example, a brief news item could be "Monday, May 29th, is a company holiday. Doors will be locked and phones will not be answered."

Field	Description
Start Date	Required. Enter the date (Eastern Time Zone) when the item should become visible to the employees. This date defaults to the current system date.
End Date	Required. Enter the date (Eastern Time Zone) when the item should be removed from the home page. Expense automatically hides the item at the start of the day specified in this field. **TIP:** If you want the message to appear for a long length of time, use a date well into the future.
Applies To	Click one or more groups. These are the groups of employees who will see the message. Click Global for messages that are to be viewed by all users.
Update All Languages?	Select this box to update all languages with the text displayed on the screen.

3. Click **Save.**

Editing Company Info

➤ ***To edit Company Info:***

1. On the **Company Info** page, either:
   - Click the desired message and then click **Modify**.
     – or –
   - Double-click the desired message.
2. Edit the fields as necessary, using the field descriptions in *Adding Company Info* in this guide.
3. Click **Save**.

Localizing Company Info

The Company Info item may need to be localized into other languages. The editor supports multiple language versions of the same item.

➤ ***To add another language:***

1. On the **Company Info** page, click the name of the item you would like to localize.
2. Using the **Language** list, select the desired language.
3. Enter the localized text.

4. Click **Save**.

5. Continue repeating steps 2-4 for all the desired languages.

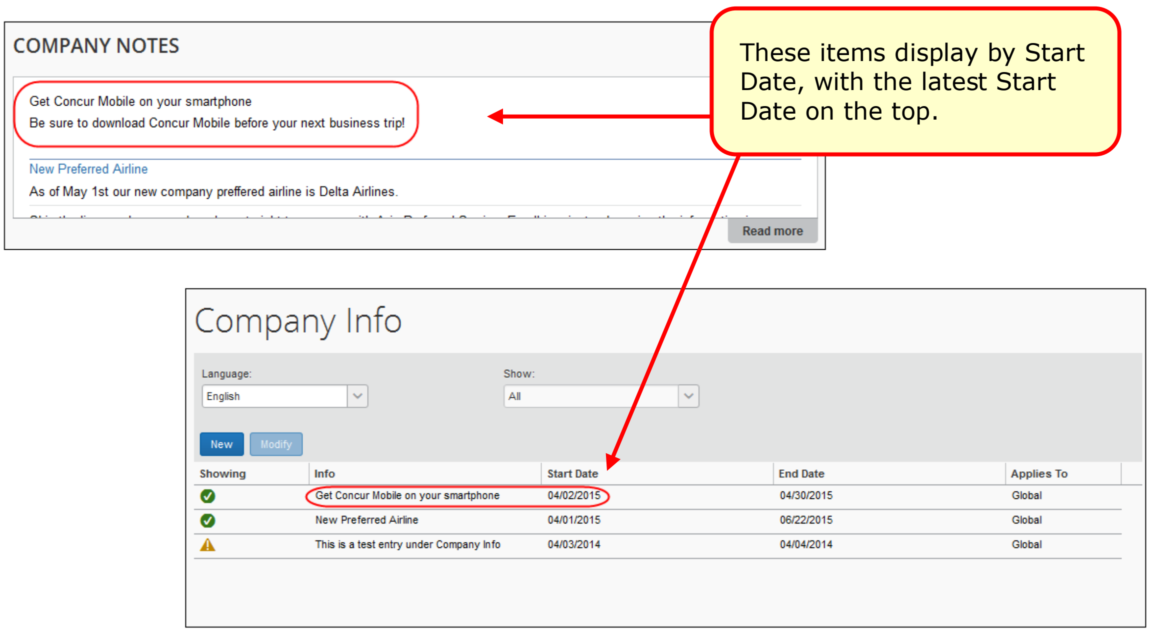
Section 4: Information about Sorting, Icons, and Display

In the following samples, ***assume that today is April 7.***

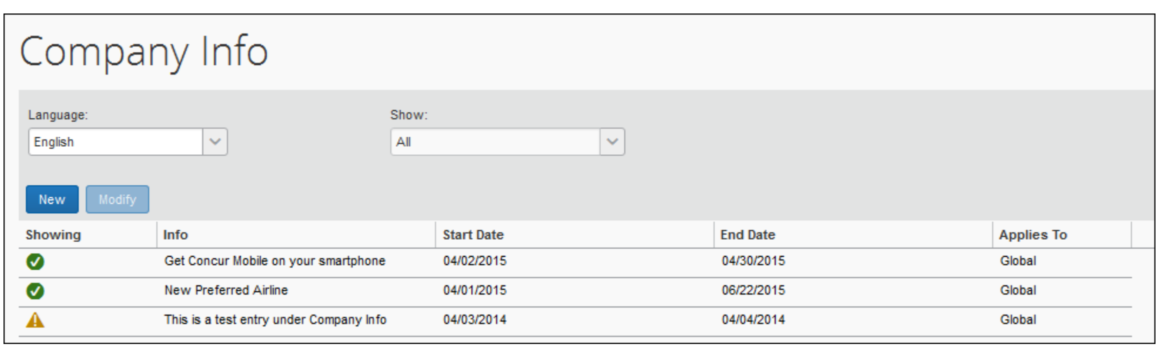
Current and Future vs. All

On the **Company Info** page, the list on the right side of the page has two display options: *Current and future* and *All*.

Current and future shows all items that currently display to the user on the home page, including items with a Start Date of today.

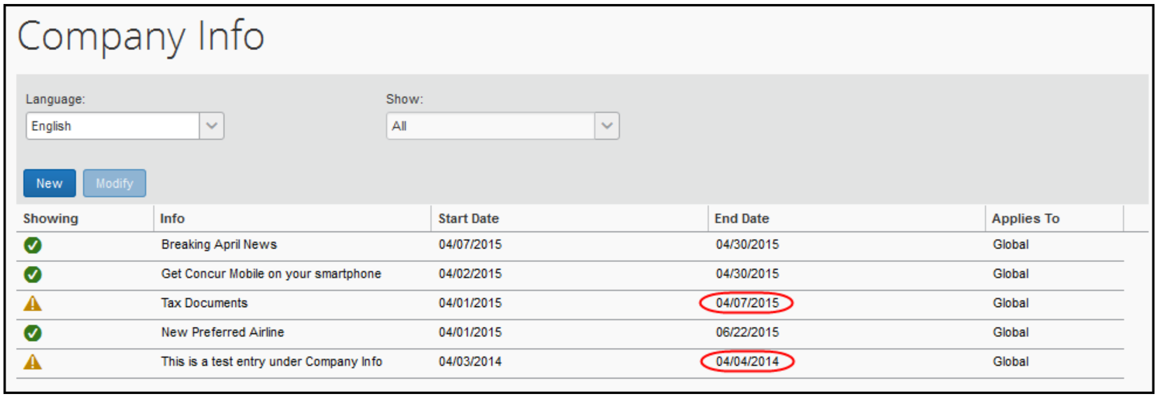


All shows all Company Info items.



Yellow Icon

In *All* view, the yellow icon means the item is no longer visible to users, including those with an End Date of today (April 7):



Default Sort Order on the Company Info Page

⚠ Remember, you can sort any column on the **Company Info** page by clicking the column headings.

The default sort order is by Start Date, latest at the bottom