Shared: Data Retention

User Guide

Last Revised: April 1, 2024

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
April 1, 2024	Added info about Pause/Resume feature.
February 14, 2024	Updated screenshots on pages 4, 5, and 6.
September 13, 2023	Updated entire *Overview* section
September 8, 2023	Removed references to the **Purge User** button.
May 11, 2023	Added note to the Purge User button procedure on page 4.
April 29, 2022	Added note about 1000 user limit on hold.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
September 10, 2021	Updated to include steps to purge user data from a Test environment.
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
January 28, 2019	Added a note that it may take up to 24 hours for the Purge User button to enable after deactivating a user.
May 12, 2018	Initial publication.

Data Retention

> **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.

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 Data Retention feature enables clients to control how long SAP Concur stores their data based on who, when, and where criteria.

By configuring this feature, clients can address requirements to comply with data privacy regulations by removing data. This feature removes data by anonymizing or deleting the data.

> **NOTE:** Anonymization and deletion are employed for security and privacy purposes.
>
> In the context of data protection, anonymization removes direct and indirect personal identifiers that can identify an individual. Anonymization is not reversible.

This feature is available for clients in both our production and test (Implementation) entities.

The Data Retention feature does not delete data directly. The various product areas execute the actual removal of the data for their product. For Example, Concur Expense, Concur Invoice, and Concur Request teams manage their own data, including anonymization and deletion.

For each customer that has configured Data Retention Policies, the age of their data is calculated on a nightly basis. (Refer to the *Determining the Age of the Data* section in this document for a calculation table). The applicable product teams then execute anonymization or deletion of the eligible data. This process occurs for users' transactional data regardless of their status (active or inactive).

Required Client-Driven Components

The Data Retention feature has two required client-driven components:

- Profile Data Purge
- Data Retention Policy Purge

Profile Data Purge

The Profile Data Purge removes profile data in two intervals:

1. The first interval removes all profile data that has no bearing on the referential integrity of the user's transactional history. This includes (but is not limited to) data such as the user's email address, passport number, emergency contact information, and travel preferences for airlines, hotels, and rental car agencies.

   The user's name and user ID are retained at this point to maintain referential integrity with transactional data that has not yet been removed by the retention period.

2. The second interval removes the remaining profile data and the removed user's name, and login ID are anonymized with a Universally Unique Identifier (UUID).

   NOTE: UUIDs are universally accepted as being globally unique due to the 36-character string that contains numbers, letters, and dashes.

   After an inactivated user's transaction history has been removed by the retention schedule, the user's remaining profile data will be anonymized or deleted after the longest retention period has elapsed.

Data Retention Policy Purge

AUDIT

Audit Tasks related to identified Users are deleted. Deleted tasks include but are not limited to:

- All the data contained in the associated expense report.
- OCR text of any receipts that have been attached to the expense report.
- Results of auditing that has been performed on the expense report.

BANKING

All bank account details related to identified users, including secondary account data, is anonymized or deleted. This includes but is not limited to:

- Routing number, account number, name on account.
- Bank name, branch location, address, tax ID.

- Occupation, citizenship, and date of birth.

CASH ADVANCE

All Cash Advance details related to identified users that are contained in associated cash advance requests and issued cash advances (used or unused) are deleted.

CREDIT CARD

All Credit Card transactions related to identified users are deleted in accordance with the configured retention timeframe. Card transactions are deleted after expense entries are deleted. If the last transaction related to a card account is deleted, then the account(s) is also deleted. Additionally, unowned card data is deleted if it is older than the global retention timeframe.

EXPENSE REPORT

All Expense Report data related to identified users are deleted when their associated expense reports are deleted. The Expense Report details include but are not limited to:

- Report Header content, Report Entry content, Allocation content, and Cash Advance reference.

ITINERARY

All itinerary data related to identified users are deleted when their associated expense reports are deleted or if there is an unused itinerary. Itineraries contain but are not limited to:

- Company ID, User ID, Dates/times, departure and arrival location, addresses, itinerary ID, description, lodging details, and cross border details.

MILEAGE

All Journey Logs, Routes, and registered vehicles related to identified users are deleted.

Journey Logs include but are not limited to:

- Company ID, User ID, Report ID, Entry ID, Vehicle URL, route URL, odometer (start, end), calculation values, and journey date.

Routes include but are not limited to:

- User ID, Route ID, avoid highways, avoid tolls, unit, polyline (actual route data), and segments.

Vehicle data includes but is not limited to:

- Company ID, User ID, vehicle ID, description, deleted, preferred, properties (ownership type, engine size, engine power), location, and odometer.

RECEIPTS

All Receipt data related to identified users are deleted when their associated expense reports are deleted.

Receipt data includes but is not limited to:

- Attached receipt images.
- All electronic receipt details from vendors that use our supported electronic receipt schemas.

REQUEST

All Request data related to identified users are deleted when their associated expense reports are deleted. The Request details include but are not limited to:

- Request Header content, Request Entry content, Report Entry reference, Cash Advance reference, Itinerary.
- Agency Proposal, Segment details.

TRAVEL ALLOWANCE

All Travel Allowance data related to identified users are deleted when their associated expense reports are deleted or if there is an unused Travel Allowance.

Travel Allowances contain but are not limited to:

- Company ID, User ID, Dates/times, departure and arrival location, addresses, itinerary ID, description, lodging details, daily allowance details.

NOTE: If you use the Budget feature together with Central Reconciliation, refer to the *Shared: Budget Setup Guide* for more information.

Section 3: Hold User

A hold can be placed on a user so that none of that user's data will be impacted (removed) by the Data Retention feature.

The Data Retention feature includes a **Hold User** button on each user's configuration page. When the **Hold User** button is clicked, the button text changes to **Remove Hold**. While the hold is in place, the user's data is preserved regardless of the configured data retention policies.
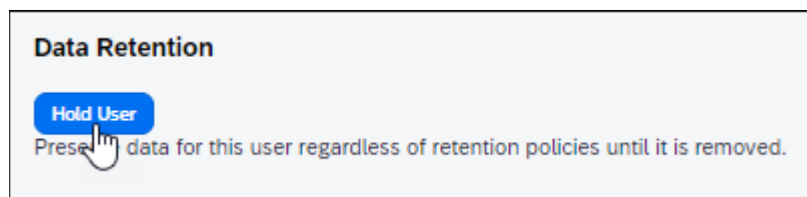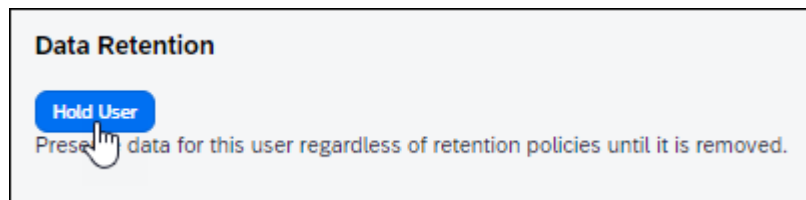

Clicking the **Hold User** button places an immediate hold on the user's data.
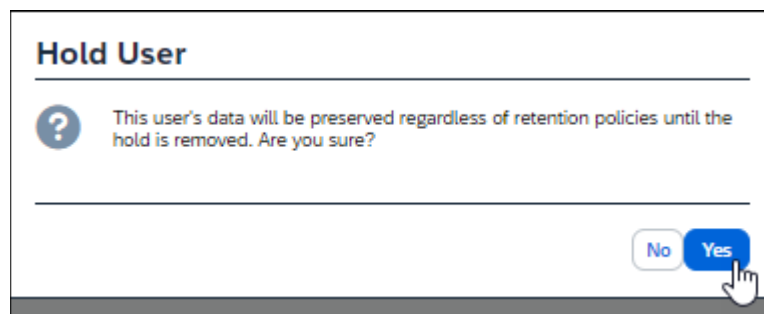

Keep a Specific User's Data

▶ *To place a hold on a user's data:*

1. Log in as a Data Retention Admin.

2. Click **Administration > Company > Company Admin > User Administration**.

3. Search for the user and click the user's name.
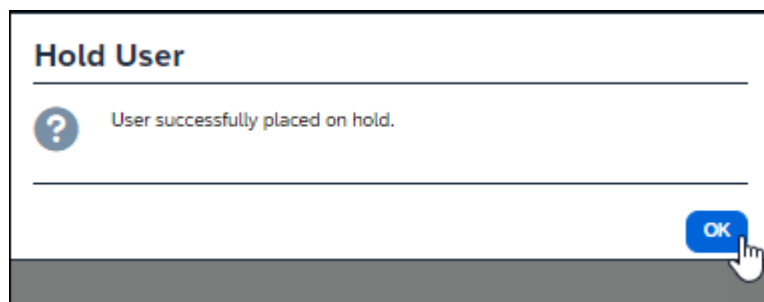
4. Click **Hold User**.

> **NOTE:** Only a **Data Retention Administrator** will see the **Data Retention** section of the user's page.
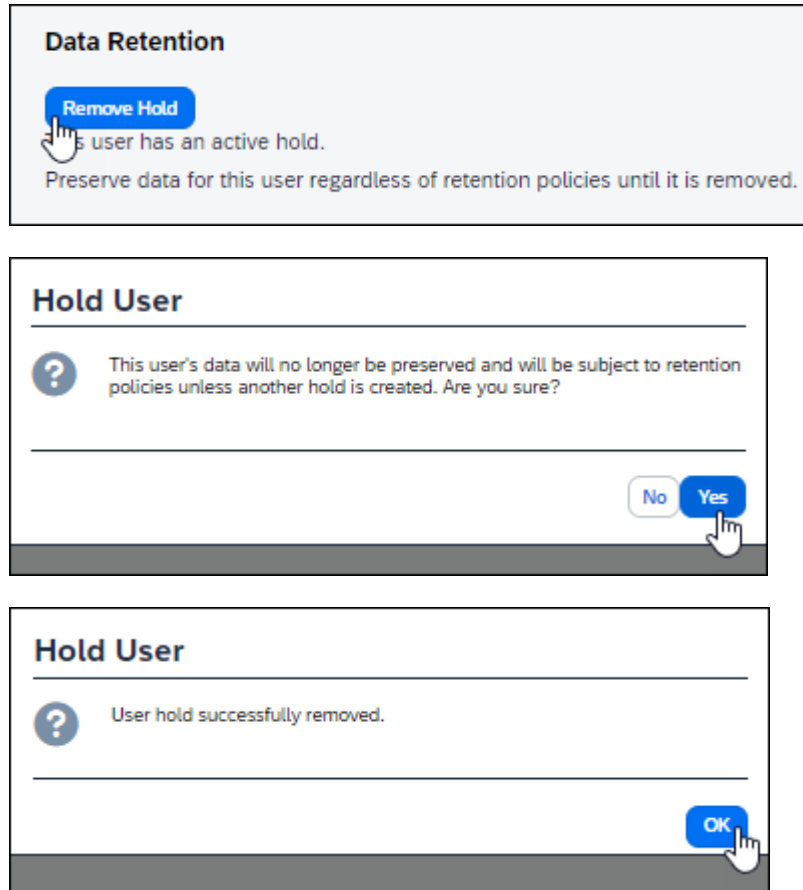
5. To confirm the hold, click **Yes**.

6. Click **OK**.

When data hold is enabled for a user, the button text changes to **Remove Hold**.

7. To remove the hold on the user's data, click **Remove Hold**, then click **Yes** to confirm removal of the hold, and then click **OK** to close the **Hold User** window.

Data Retention

Remove Hold

This user has an active hold.

Preserve data for this user regardless of retention policies until it is removed.

Hold User

This user's data will no longer be preserved and will be subject to retention policies unless another hold is created. Are you sure?

No   Yes

Hold User

User hold successfully removed.

OK

The button text returns to **Hold User**.

Remove a Specific User's Data

Removing the user data from a production environment, explained below, is like removing data from a test environment. However, when removing a user's data from a test environment, additional steps explained in this document are required.

Section 4:   Pause and Resume Data Retention Sitewide

This feature enables the client data retentions administrator to pause and resume data retention activity sitewide.

Before pausing or resuming data retention:

- Administrators from different parts of the client's business should coordinate with each other.

- Client administrators should consider the impact of pausing or resuming data retention on policies with different timeframes.

! **IMPORTANT**: To avoid non-compliance with internal or external Data Protection and Privacy requirements, Data Retention should only be paused briefly. Resume data retention activity as soon as possible. When applicable, the **Hold User** feature, which pauses data retention for a specific user, should be used.

The client administrator is responsible for pausing and resuming data retention activity.
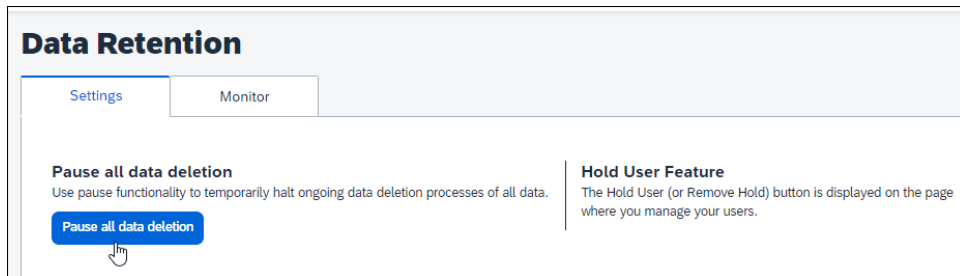

▶ *To pause Data Retention Sitewide:*

1. On the **Data Retention** page, click **Pause all data deletion**.
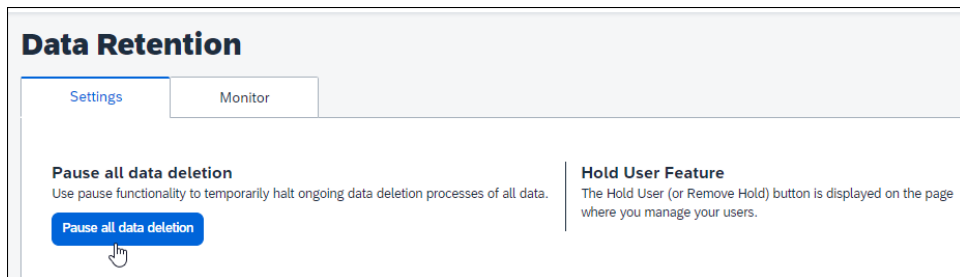
▶ *To resume Data Retention Sitewide:*

1. On the **Data Retention** page, click **Resume all data deletion**.

Section 5: Test Entities – Delete Entity

A test entity may be created on behalf of a client for various reasons. When the client wishes to remove selected users from a working test entity, or, when no longer needed, the client may also request the test entity be deleted entirely.

This action requires that the client contact their SAP Concur representative or submit a ticket directly for completion of these tasks. The necessary steps are controlled by SAP Concur and Support staff will work closely with the client to ensure the steps are completed successfully.

Removing a User's Data from a Test Environment

Concur Support must be contacted to remove user data from a test environment – the tools to do so are not available to the client.

▶ *To remove user data from a test environment:*

1. First, confirm the specified user's data has been removed from any production environment.

2. Submit a ticket to Concur Support requesting the functionality to remove a user from a test environment be implemented for the client.

3. On confirmation from Concur that the functionality to do so is enabled, use the procedure *Remove a Specific User's Data* in this document to remove the user's data from the specified test environment.

4. Contact Concur Support confirming the task is completed.

5. Concur Support closes the ticket on confirmation, disabling the functionality to remove users from a test entity.

Delete a Test Entity

To delete a test entity the client should submit a Support ticket requesting that the entity be deleted, either directly or through their SAP Concur representative.

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