

# Shared: Users

## Setup Guide for Concur Standard Edition

**Last Revised: January 23, 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
January 23, 2024	Updated description for Country of Residence and Locale columns.
December 14, 2023	Update to reflect that admins can now set a user's delegates and that the password column has been removed from the import spreadsheet.
July 28, 2023	Updated password information to clarify that password provisioning using the import is no longer supported. Any values provided in the password fields will be ignored. All new imported users will be given a randomly generated password and will have to change their password on first login. This change is valid as of August 2, 2023.  Updated the following section with this change: <ul style="list-style-type: none"> <li>User Import Fields</li> </ul>
June 17, 2023	Added the Is Payment Release Manager? role to the table in the <i>Add a User</i> section.
August 25, 2022	Updated the Import Users section to reflect UI changes.
August 20, 2022	Minor cross-reference edit in the <i>Add a User</i> section; cover date not updated
May 27, 2022	Renamed 'Nickname' to 'Preferred Name' and updated the definition.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated instructions for <b>Product Settings</b> page
April 5, 2021	Updated to reflect new features and page design changes to <b>Users</b> , <b>Add User</b> , and <b>Edit User</b> pages.
March 22, 2021	Updated the "Company Card" page name to "Payment Types".
March 11, 2021	Updated to reflect that the new <b>Add User</b> and <b>Edit User</b> pages are now the default pages.
February 11, 2021	Added information about the new <b>Add User</b> and <b>Edit User</b> pages.
July 31, 2020	Added Thai to the Locales for Supported Languages table.
July 24, 2020	Updated several screen shots to reflect page name changes from <b>Users</b> to <b>Create User</b> and <b>Edit User</b> .
July 7, 2020	Changed one instance of "Manage Custom Fields" to "Custom Fields".
June 25, 2020	Updated to reflect the redesigned <b>Users</b> page changes. The previous version of the guide has been renamed "Legacy" and is still available. When this UI becomes the only UI the legacy document will be retired.
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; updated China terminology to Hong Kong, China, Taiwan, China, and Macau, China
September 21, 2019	Updated content for the Edit the Invite Email section.

Date	Notes/Comments/Changes
August 17, 2019	<p>Added a Bulk Edit for Multiple Users section in the Download a Spreadsheet chapter.</p> <p>Added a note to the XML Profile Synchronization ID field indicating it is now only for updates and not for the removal of existing data.</p> <p>Updated the description of the Employee ID and ERP Vendor name fields to reflect UI changes.</p>
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
May 30, 2019	Updated text to reflect UI name change from "payment request" to "invoice".
May 11, 2019	<p>Added the following note to the <i>Amadeus User</i> field: "Although still displayed, this field is no longer active, and any values it contains will be ignored by the system."</p> <p>Added the following note to the <i>Password</i> field: "The password field will remain available in the downloadable Excel template, but will only be read during an initial import of the file, or when creating a new user in the system. Subsequent uses of the field will be ignored by the system."</p>
April 17, 2019	Added the Indonesia country code to the Locale field description in the User Import Fields table.
March 28, 2019	Clarified the definition of Country Code and updated the list in the appendix.
March 5, 2019	Corrected the two-character ISO country code for the United Kingdom from "UK" to "GB" in three places.
February 12, 2019	Updated the copyright; no other changes; cover date not updated
July 26, 2018	Updated the Travel Only Administrator user role description.
May 31, 2018	Updated the Can Administer user role description.
May 18, 2018	Added a procedure: Update an Existing User's Employee ID.
May 12, 2018	<p>Updated information about Budget roles, and removed information about QuickBooks Connector, as content is now consolidated in the Shared: QuickBooks Connector Setup Guide.</p> <p>Added the <b>Is Data Retention Admin</b> permission for Travel.</p>
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 17, 2018	Added information about Budget roles.
February 26, 2018	<p>Added a note about LoginID: The LoginID must be unique across all Concur products. In addition, once a LoginID is used, it cannot be used again.</p> <p>Added a note about custom fields. It is a best practice to <b>not</b> allow personal, sensitive, or uniquely identifying information in custom fields.</p>
November 4, 2017	Updated guide to include new <b>Product Settings</b> page, which replaces the Setup Wizard.
October 18, 2017	Updated the <i>QuickBooks Connector and QuickBooks Financial Integration Clients Only</i> section.

Date	Notes/Comments/Changes
October 14, 2017	Added information about the new Receipt User role for Invoice.
July 29, 2017	Added information about the <b>Invoice User Country</b> list for Invoice.
July 8, 2017	Added information about new Central Receiver role for Invoice.
June 3, 2017	Added information the following: <ul style="list-style-type: none"> <li>• The Invoice Payment Manager role</li> <li>• The <b>All</b> option for policy groups</li> </ul>
March 18, 2017	Updated with menu option name change to access Setup Wizard.
February 17, 2017	Removed note about the Import Users button for QuickBooks connected companies.
January 20, 2016	Updated some user import field descriptions.
December 15, 2016	Changed copyright; no other content changes.
December 8, 2016	Updated the guide content to new corporate style; no content changes.
November 21, 2016	Added information about the Invoice Processor role.
November 15, 2016	Added note about the Import Users button for QuickBooks connected companies. Removed the Concurforce check box from the cover.
	Older revision history has been removed.

# Users

**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: Overview

The **Users** page allows an administrator to add users, search for users, update user information, send invites to users, activate users, and view lists of users.

Every person at your company who needs to enter or approve expense reports, invoices, authorization requests, administer the site, or configure the site must be added as a user.

The administrator can add new users manually or by importing a user spreadsheet. The administrator can also edit multiple users by downloading the user spreadsheet, making changes to existing users' information, and importing the updated spreadsheet.

**NOTE:** The **Import Users** spreadsheet supports a maximum of 1000 users.

The administrator can also edit a default email invitation and send the email invitation from the **Users** page.

If you use the approval routing that includes report or invoice amount limits, you can set the limit amounts for your approvers on their user page. The limit amount that you set is the maximum amount that the user can approve. If you use this workflow and do not give an approver a limit, every report or invoice the user approves must go to an approver with the appropriate limit approval.

Users

Use the Add Users button below to add users one at a time (manually), or by importing through a spreadsheet.

Add Users ▼

Manage Users (18)

Search by Name, Email, or Manager

Show: Active Users ▼

<input type="checkbox"/>	Last Name *	First Name	Email	Manager	Status
<input type="checkbox"/>	Admin	Budget	BudgetAdmin@tangochris.com		Incomplete
<input type="checkbox"/>	Admin	Expense	ExpenseAdmin@tangochris.com		Active
<input type="checkbox"/>	Admin	Invoice	InvoiceAdmin@tangochris.com	Common, Susan	Active

## ADP Clients Only

This step provides a way for you to enter the required information to reimburse the user with ADP.



## QuickBooks Clients Only

This step provides a way to capture the QuickBooks Vendor ID associated with an employee (QuickBooks requires this field when creating bills for amounts reimbursable to employees) and to reimburse them for expenses they enter in SAP Concur solutions.

## Clients Connected to Financial Systems

If you have connected SAP Concur solutions to your financial system, some fields on this page might display different labels or pre-populated values based on your connected financial system.



For more information, refer to the SAP Concur setup guide for your financial system.

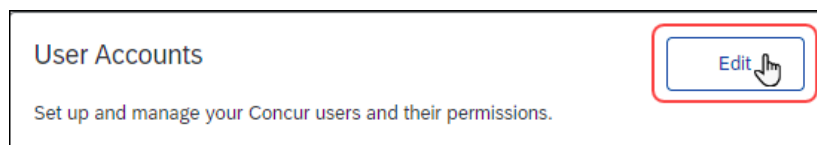
## Section 2: Configure Individual Users

This section describes how you manage users on the **Users** page.

### Access the Users Page

► **To access the Users page:**

1. Navigate to **Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**.
2. In the **Product** list click, *Expense*, *Invoice* or *Request*.
3. In the **Access To Concur** section, on the **User Accounts** tab, click **Edit**.



## Add a User

► **To add a new user manually:**

1. On the **Users** page, click **Add Users > Manually**.

The **Add User** page opens.

Expense Settings > Users > Add User

Welcome to the new UI for the add and edit user pages. Please click here to provide your feedback on the new add and edit user page UI. If you prefer, you can change back to the existing UI.

**Add User** Need help? [How it works](#)

If you know many users, you can import them through a spreadsheet. Save Cancel

**User Information**

First Name \*  Middle Name

Last Name \*

Email

☒ Use Email as Username

Username for Sign In \*

Password \*

Retype Password \*

Employee ID \*

Country/Region Of Residence \*

State/Province

Account Activation Date \*

Account Termination Date

**Products**

Expense Request Invoice Travel Reporting

**Settings**

☐ Exempt from Expense Type Limit rules?

Reimbursement Method \*

**Permissions**

Submit ☒ Can Submit Expense Reports

Approve ☐ Can Approve Expense Reports

Administer ☐ Travel and Expense Administrator (includes Request) ☐ Can Process Expense Reports (includes Request)

Expense Manager

☒ Automatically send invite email on save Save Cancel

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**NOTE:** The sections and fields that appear on the **Add User** page depend on your company's configuration. The product tabs that appear in the **Products** section depend on the SAP Concur products your company uses.

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2. Fill in the appropriate fields on the **Add User** page. Fields on the page with a red asterisk (\*) by their name are required.
3. Click **Save**.

The fields that appear on the **Users** page differ depending on your configuration.


For example, accounting-specific fields tied to the accounting solution you selected on the **Accounting** page in Product Settings will appear on the **Users** page.


In addition, if you added any custom fields on the **Custom Fields > Add New Field** page in Product Settings, depending on how the visibility of the custom fields is configured, they might appear on the **Users** page.

The following table lists fields that might appear on the **Users** page. Some of the fields in the following table might not appear on your version of the **Users** page and your **Users** page might have custom fields not listed in this table.

Field Name	Description/Action
Automatically send invite email on save	Select this check box to send an invite message to the user's email address when you save the user. You can edit the content of the invite message by clicking <b>Edit Invite</b> on the main <b>User Accounts</b> page.
Login (email address)	Enter the user's login name. It must be formatted as an email address.  <b>NOTE:</b> The email address in this field must be unique across all SAP Concur entities. If a Login (email address) is currently in use in any SAP Concur entity, it cannot be assigned to another user. If you attempt to save a new user with a Login that is already in use, an error message appears when you click <b>Save</b> and the user cannot be saved.
Password	Enter the user's initial password. The user is prompted to change their password the first time they log in. If you are editing an existing user, you can leave the <b>Password</b> field blank to keep their existing password.  <b>NOTE:</b> The user's initial password must meet the requirements set by the admin on the <b>Sign-In Settings</b> page. Refer to the <i>Password Policy Settings</i> setup guide for details.
Retype Password	Re-enter the user's password. If you are editing an existing user, you can leave the <b>Retype Password</b> field blank to keep their existing password.

Field Name	Description/Action
First Name	Enter the first name of the employee.
Last Name	Enter the last name of the employee.
Middle Name	Enter the middle name of the employee.
Employee ID (Non ERP-connected clients only)	Enter the identifier that you use for the employee in your financial system. Examples include vendor name, employee number, or payroll number. <b>NOTE:</b> If the system is connected to an ERP, this field is replaced with the <ERP Vendor> Name field.
<ERP Vendor> Name (ERP-connected clients only)	Enter the vendor name of the employee in your ERP system. <b>NOTE:</b> The name of this field changes to reflect the name of the configured ERP system.
Email	Enter the user's email address.
Country/Region of Residence	Select the country the user is located in.
State/Province	Select the user's state or province.
Cash Advance Account Code	Enter the account code for the account to which cash advances to this user should be distributed.
Locale	Select the user's language locale.
Active	Select (enable) the check box if this is an active user. If this check box is cleared (disabled), the user cannot log in to this SAP Concur implementation.
Exempt from Expense Type Limit rules?	Select (enable) the check box if this user should not be held to the expense type amount limits defined on the <b>Expense Limits</b> page.
Reimbursement Method	Select the method used to reimburse this employee. Depending on the method selected, additional fields may appear.
Employee Administration Country (This field only appears if there is more than one country implemented)	This field allows you to select the country from which the employee is administered. The policies that apply for that specific country apply to the employee. For example, if you have employees in Japan but would like the United States policies to apply to them, select United States in this field.
Expense Policy Group (This field only appears if policy groups have been created)	If policy groups exist, each employee must be assigned a policy group or a country-specific default configuration policy group. The expense types and limits of the group will apply to this employee.
Invoice Policy Group (This field only appears if policy groups have been created)	If policy groups exist, each employee must be assigned a policy group, the default configuration policy group, or all policy groups. The expense types and limits of the group will apply to this employee. <b>NOTE:</b> If the admin selects the <b>All</b> option, the user will be able to select the relevant policy group for the invoice they are creating.


Field Name	Description/Action
Invoice User Country	<p>If more than one country pack has been activated by Concur, admins can select one or all countries to which the user belongs. If only one country is available, the <b>Invoice User Country</b> list will not be visible.</p> <p> For more information, refer to the <i>Concur Invoice: Country Packs With VAT Setup Guide</i>.</p>
Reimbursement Currency	Select the user's reimbursement currency.
(Expense) Manager <b>NOTE:</b> Expense appears in the field label when Expense is integrated with Request.	Select the user who approves this employee's expense reports. All users with the <b>Can Approve Expense Reports</b> check box selected appear in this list.
Request Manager	Select the user who approves this employee's authorization requests. All users with the <b>Can Approve Requests</b> check box selected appear in this list.
Second Approver	<p>Select the user who approves this employee's expense reports after their manager approves them.</p> <p><b>NOTE:</b> This field appears only when the second approver workflow is selected.</p>
ADP Company Code (ADP clients only)	The company code used by ADP.
ADP Deduction Code (ADP clients only)	The deduction code used by ADP.
ADP Employee ID (ADP clients only)	The employee ID used by ADP.
Expense Audit Required (only available if Audit Service has been purchased)	<p>Select the appropriate value:</p> <ul style="list-style-type: none"> <li>• Audit always required. This employee's reports are always selected for audit.</li> <li>• Audit never required. This employee's reports are never selected for audit.</li> <li>• Audit required conditionally. This employee's reports are selected for audit only if expense transactions on the report meet at least one of the selection criteria configured on the <b>Compliance Controls</b> page of Product Settings.</li> </ul>

Field Name	Description/Action
Cognos Reporting Access	<p>Select the user's role for the Cognos Reporting. The available roles are:</p> <ul style="list-style-type: none"> <li>• <b>Cognos Consumer:</b> Can use Analysis/Intelligence to view data for reports. The Consumer license type has the most restricted access to the Analysis/Intelligence features.</li> <li>• <b>Cognos Business Author:</b> Can use Analysis/Intelligence to view data for reports. The Business license type restricts the Analysis/Intelligence features to which they have access.</li> <li>• <b>Cognos Professional Author:</b> Can use Analysis/Intelligence to view data for reports. The Professional license grants access to all Analysis/Intelligence features.</li> </ul>
Can Administer (includes Request)	<p>This user performs the configuration of Concur, maintains user information, is responsible for the final approval and processing of expense reports, exporting financial data and running reports. When this check box is selected (enabled), the user gets access to Product Settings and the Administration menu.</p> <p>This user can also access the <b>Manage User Apps</b> page to restrict the User applications in the SAP Concur App Center for their company's users, and enable Enterprise partner applications within the SAP Concur App Center</p> <p> For more information, refer to the <i>Shared: App Center Administrator User Guide</i>.</p> <p>If the company has Request, the user with this role also performs the configuration of Request.</p>
Can Submit Expense Reports	<p>This user can create and submit expense reports in Concur. When this check box is selected, the user gets access to the <b>New Expense Report</b> button.</p>
Can Approve Expense Reports	<p>This user has the responsibility of approving expense reports. When this check box is selected, the user's name appears in the (Expense) Manager list of the <b>Users</b> page, and appears in the list of approvers that the user sees when they do not have a manager defined.</p>
Can Limit Approve Reports	<p>This check box appears if you use the Approval Routing that includes limit approval. This user can approve reports whose total is equal to or lesser than the amount entered.</p>
Can Process Expense Reports (includes Requests)	<p>This user can process expense reports in Concur. When this box is selected, the user is provided access to the Processor role by the admin without having full administrative rights.</p> <p>If the company has Request, the user can also process requests.</p>
Can Submit Requests	<p>This user can create and submit requests in Concur. When this check box is selected, the user gets access to the <b>New Authorization Request</b> button.</p>

Field Name	Description/Action
Can Approve Requests	This user has the responsibility of approving authorization requests. When this check box is selected, the user's name appears in the Request Manager list of the <b>Users</b> page, and appears in the list of approvers that the user sees when they do not have a manager defined.
Budget Administrator	This user 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. <b>NOTE:</b> Applicable to Invoice, Expense, and Request.
Budget Owner	This user owns the budget and can view budgets in the dashboards. The Budget Owner does not have access to the budget configuration information. <b>NOTE:</b> Applicable to Invoice, Expense, and Request.
Budget Approver/Manager	This user approves invoices, purchase requests, and expense reports and can view budgets in the budget dashboards. The Budget Approver/Manager does not have access to the budget configuration information. <b>NOTE:</b> Applicable to Invoice, Expense, and Request.
Budget Viewer	This user views budgets in the dashboards. Can be one or several budget viewers. The Budget Viewer does not have access to the budget configuration information. <b>NOTE:</b> Applicable to Invoice, Expense, and Request.
Is Invoice Admin?	This user performs the configuration of Concur, maintains user information, is responsible for the final approval and processing of invoices, and running reports. When this check box is selected, the user will get access to Product Settings and the Administration menu. <b>NOTE:</b> Existing Invoice Admins will have the <b>Is Invoice Payment Manager?</b> check box selected (enabled) by default and will be able to perform payment manager tasks.
Is Invoice AP User?	This user can create, assign, and unassign invoices. They can also delete an invoice and restore the invoice from the deleted state.
Is Invoice Owner?	This user can create and submit invoices in Concur. When this check box is selected, the user will see the <b>Create New Invoice</b> button.
Is Invoice Approver?	This user has the responsibility of approving invoices. When this check box is selected, the user's name will appear in the Manager list of the <b>Users</b> page, and will appear in the list of approvers that the user sees when they do not have a manager defined.

Field Name	Description/Action
Is Invoice Verifier?	The Invoice Verifier can work with all options in the Invoice Processing feature. Specifically, this role may access additional options on the <b>Email</b> tab, plus both the <b>Document Separation</b> and <b>Verification</b> tabs to work with emailed batches containing invoice attachments.
Invoice Approver	In the list, select who should approve the invoices that this user creates and submits.
Is Purchase Request User?	Users with this role can create purchase requests (the "Requester").
Is Purchase Request Approver?	Users with this role can approve purchase requests that the purchase request user has created.
Is Central Receiver?	Users with this role can add, edit, and delete receipts and receipt images. However, they cannot transmit or process purchase orders or invoices.
Authorized Limit Approval?	Users who have authorized limit approval can only approve purchase requests up to a certain amount specified in the field next to the currency list. <b>NOTE:</b> The client admin must have selected the Is Invoice Approver role to set an authorized limit approval for the user.
Is Purchasing Admin?	Users with this role can process purchase requests (for example, clear exceptions and send back untransmitted purchase requests) and purchase orders (for example, correct vendor and send back both untransmitted and transmitted purchase requests).
Is Invoice Vendor Manager?	Users with this role can set up and manage vendors.
Is Invoice Payment Manager?	Users with this role can perform payment manager tasks, such as view and manage batches of invoices, and run, search for, and download imports and extracts.
Is Invoice Processor?	Users with this role can, among other things, approve, delete, and reassign invoices, and clear exceptions and change the approval status of invoices.
Is Payment Release Manager?	Users with this role can access the <b>Release Payments</b> option from the <b>Actions</b> menu on the <b>Monitor Batches</b> page.  When the <b>Require Batches to be Released</b> 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.
Purchase Request Approver	In the list, select who should approve the purchase requests that this user creates and submits.

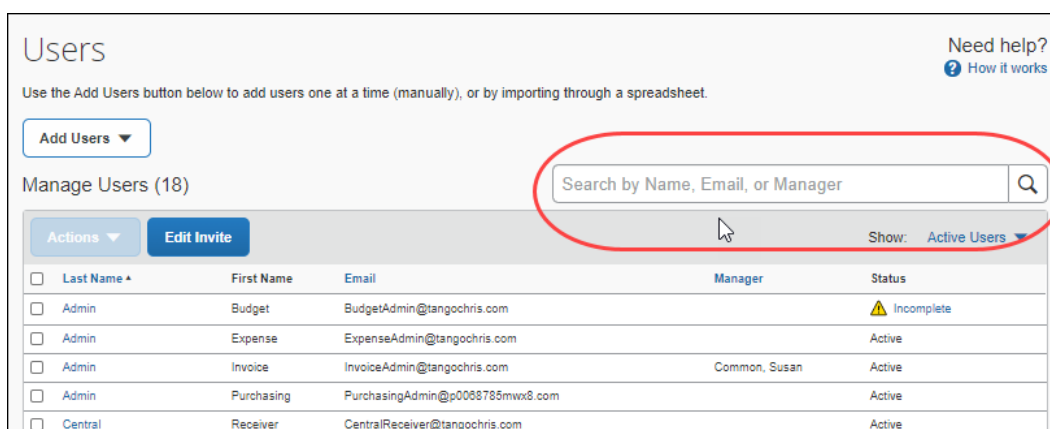


Field Name	Description/Action
Travel and Expense Administrator (only appears if you have purchased Concur Travel)	This user performs the configuration of Concur Travel and Expense, maintains user information, is responsible for the final approval and processing of expense reports, exporting financial data, and running reports. When this check box is selected, the user gets access to the Expense Settings, Travel Settings and Administration menus.
Travel Only Administrator (only appears if you have purchased Concur Travel)	<p>This user performs the configuration of Concur Travel and maintains user information. When this check box is selected, the user gets access to the Travel Setup menu.</p> <p>This user can also access the <b>Manage User Apps</b> page to restrict the User applications in the SAP Concur App Center for their company's users, and enable Enterprise partner applications within the SAP Concur App Center</p> <p> For more information, refer to the <i>Shared: App Center Administrator User Guide</i>.</p>
Guest booking	Allows user to make bookings for non-profiled travelers, such as recruits.
Report user	Grants access to reports.
Is Data Retention Admin	Grants access to <b>Administration &gt; Company &gt; Data Retention</b> for companies that use Travel. Only SAP Concur can select this check box. It displays only to SAP Concur and to users for whom the check box is selected.

## Search for a User

### ► To search for a user:

1. In the search field on the **Users** page, enter the user's first name, last name, email address, or manager's first or last name.



**Users**

Use the Add Users button below to add users one at a time (manually), or by importing through a spreadsheet.


[Add Users](#)

Manage Users (18)

Search by Name, Email, or Manager

[Need help?](#) [How it works](#)

[Actions](#) [Edit Invite](#) [Show: Active Users](#)

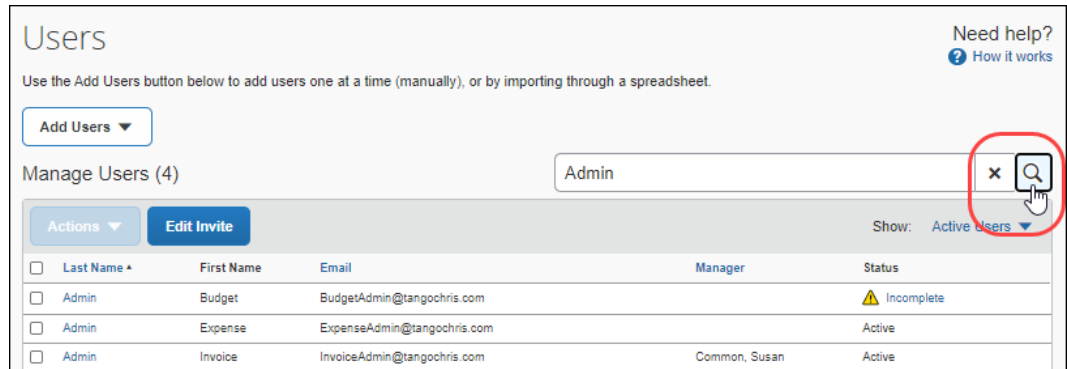
<input type="checkbox"/>	Last Name	First Name	Email	Manager	Status
<input type="checkbox"/>	Admin	Budget	BudgetAdmin@tangochris.com		 Incomplete
<input type="checkbox"/>	Admin	Expense	ExpenseAdmin@tangochris.com		Active
<input type="checkbox"/>	Admin	Invoice	InvoiceAdmin@tangochris.com	Common, Susan	Active
<input type="checkbox"/>	Admin	Purchasing	PurchasingAdmin@p0088785mwx8.com		Active
<input type="checkbox"/>	Central	Receiver	CentralReceiver@tangochris.com		Active

## Section 2: Configure Individual Users

By default, only active users are searched. You can include inactive users in your search by selecting **All Users** or **Inactive Users** from the **Show** menu.



2. Click the magnifying glass or **Enter** key to display the search results.

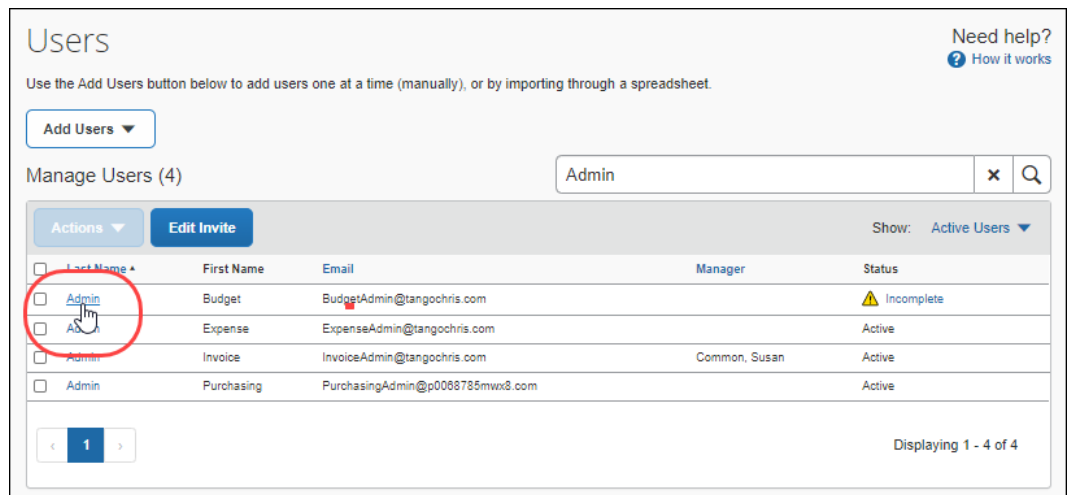


**NOTE:** You can search using only part of a search term. Wildcards are not required when searching on part of a name or email address.

## Update an Existing User

- **To update an existing user:**

1. On the **Users** page, click user's last name.



The **Edit User** page appears.

2. On the **Edit User** page, update the user's information as needed.

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**NOTE:** The sections and fields that appear on the **Edit User** page depend on your company's configuration. The product tabs that appear in the **Products** section depend on the SAP Concur products your company uses.

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3. Click **Save**.



For information about editing multiple users at once, refer to the *Import Users* chapter of this setup guide.

## Mark a User Inactive

Users cannot be deleted but can be marked inactive. Inactive users cannot sign in to SAP Concur solutions.

### ▶ To mark a user inactive:

1. On the **Users** page, click the user's last name to open the **Edit User** page.
2. Clear (disable) the **Active** check box.

3. Click **Save**.

## Edit the Invite Email

The email invitation is a welcome message that can be sent to users to let them know an SAP Concur account has been created for. The email invitation includes default text welcoming the user and a link for users to sign in to their SAP Concur products.

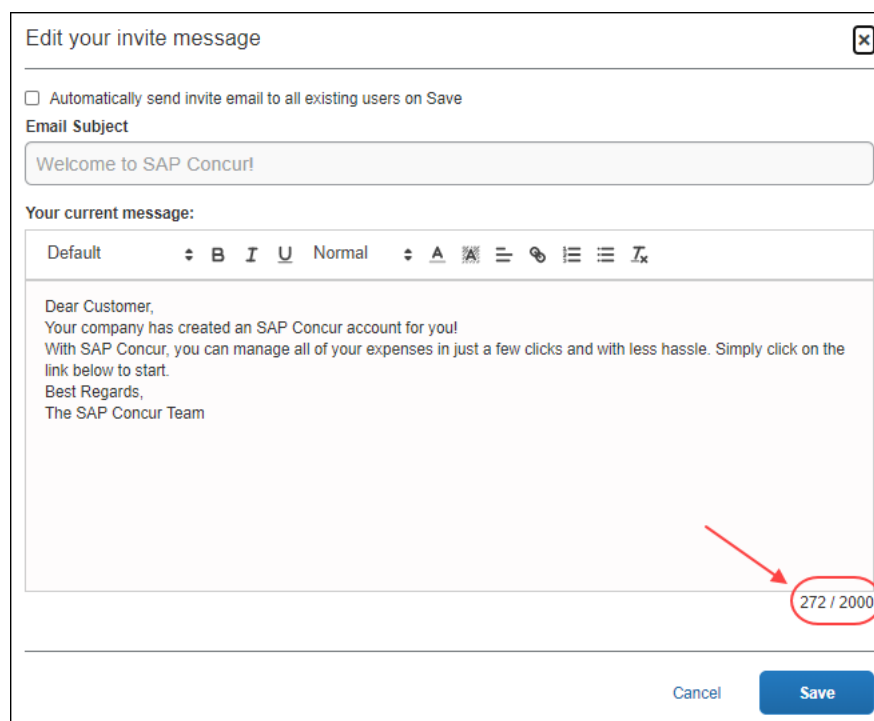
---

**NOTE:** The first time they sign in to an SAP Concur product, the user is prompted to reset their password. The new password must meet the requirements set by the admin on the **Sign-In Settings** page. For details, refer to the *Password Policy Settings* setup guide.

---

The body text of the email invitation can be customized. For example, you might want to include information about who users should contact if they have questions about their SAP Concur products.

The body text of the email invitation is limited to 2000 characters. The character count below the **Your current message** field reflects the number of characters currently used by the message vs. the 2000 character limit.



The total character count includes hidden html tags for line breaks, paragraph breaks, and HTML tags that apply formatting to text such as bold, underline, highlighting, and text size. For example, if you apply an underline to a line of text, the (hidden) `<u>` and `</u>` HTML tags are added at the beginning and end of the line which adds seven characters to the character count.

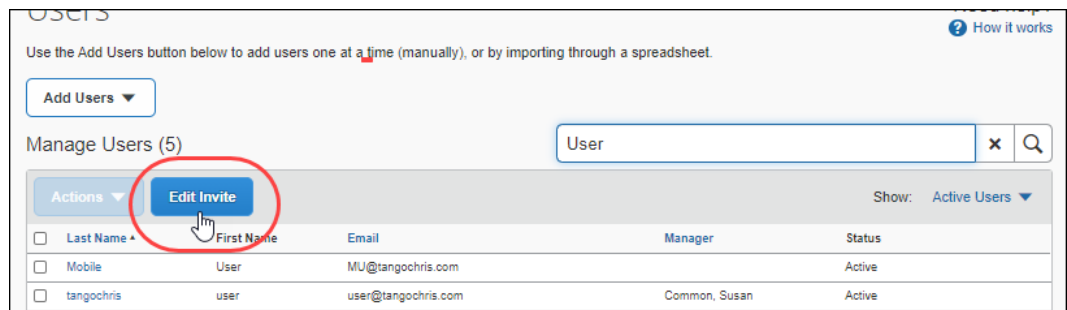
---

**NOTE:** Some HTML tags impact how screen readers interpret text. For example, applying the italic (*I*) style to text in the message adds the `<em>` HTML tag which prompts screen readers to emphasize the text verbally.

---

► **To edit the invite message:**

1. On the **Users** page, click **Edit Invite**.

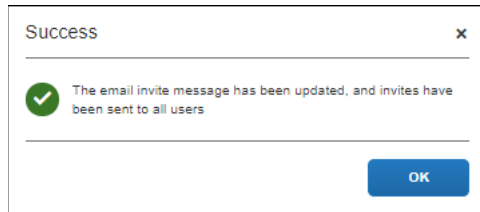


The **Edit your invite message** window appears.

2. In the **Your current message** field, update the email text as needed.
3. (Optional) To send the updated email invite to all active users when you save the message, select the **Automatically send invite email to all existing users on Save**.

4. Click **Save**.

If you selected **Automatically send invite email to all existing users on Save**, the following message appears after you click **Save**:



5. Click **OK** to return to the **Users** page.

## Section 3: Configure Company Car Registration

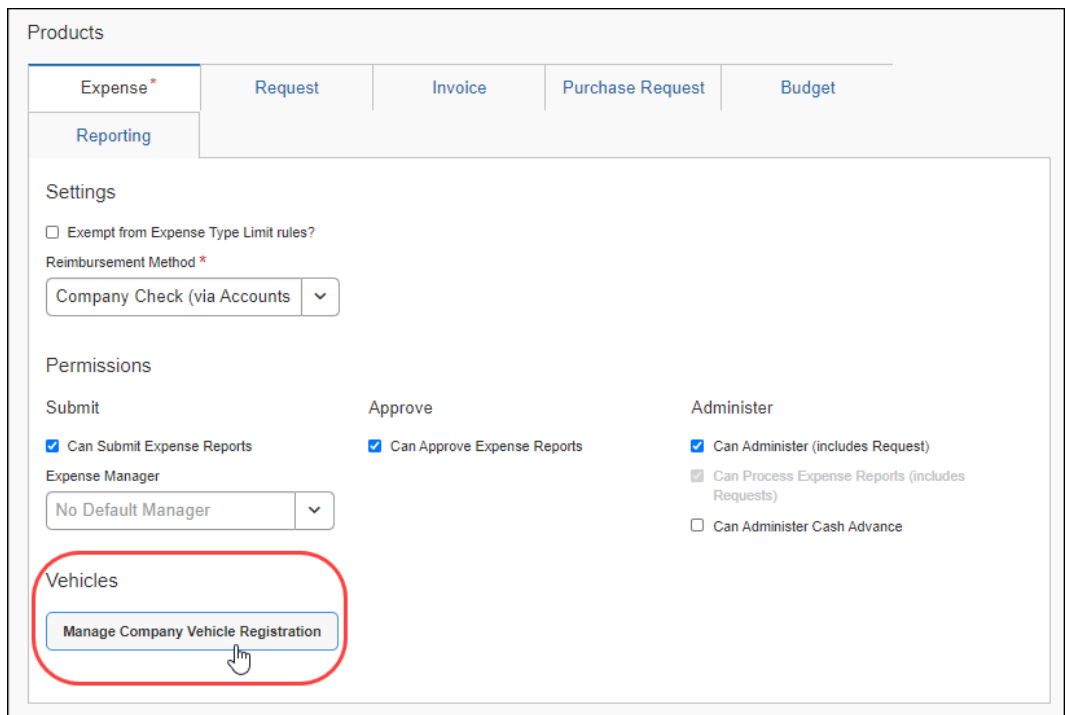
**NOTE:** This feature is only available to clients using the Expense product.

On the **Users** page, you can register a company car for a user and correct the initial distance for a registered car.

### Register or Remove a Company Car for a User

► **To register a company car for a user:**

1. On the **Edit Users** page for the desired user, in the **Product** section, on the **Expense** tab, click **Manage Company Vehicle Registration**.



- Click **New**.

The **Register a New Car** page appears.

- Fill in the fields.

Field	Description
Vehicle ID	The identifier for the vehicle. The user will select this value when creating a mileage expense.
Vehicle Type	Select the vehicle type.
Is Preferred	Select (enable) this check box to set this car to the preferred car to use. The preferred car will be used as the default car whenever the user enters a mileage expense.

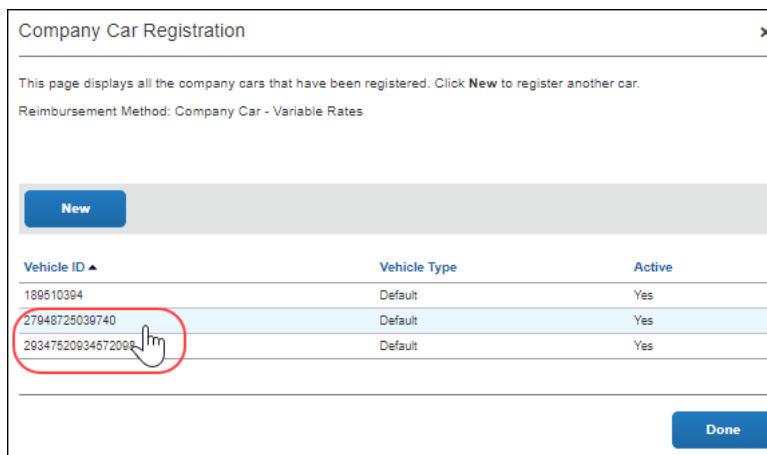
- Click **Save**.

► **To remove a company car for a user:**

On the **Edit Users** page for the desired user, in the **Product** section, on the **Expense** tab, click **Manage Company Vehicle Registration**.

- Click the row for the car you want to remove.

### Section 3: Configure Company Car Registration



Company Car Registration

This page displays all the company cars that have been registered. Click **New** to register another car.

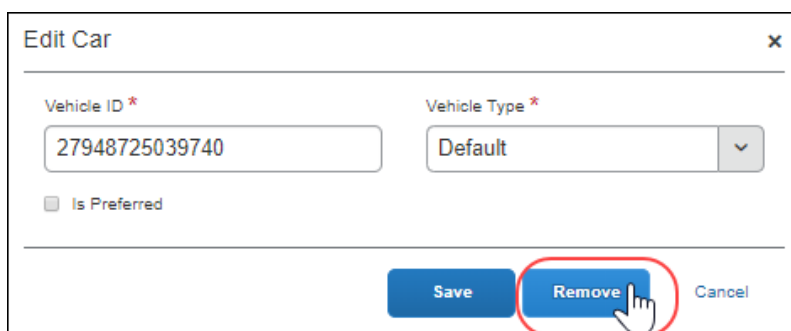
Reimbursement Method: Company Car - Variable Rates

**New**

Vehicle ID ▲	Vehicle Type	Active
189510394	Default	Yes
27948725039740	Default	Yes
29347520934572098	Default	Yes

**Done**

2. Click **Remove**.



Edit Car

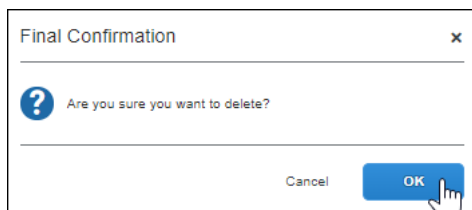
Vehicle ID \*  
27948725039740

Vehicle Type \*  
Default

☐ Is Preferred

**Save** **Remove** **Cancel**

The following confirmation message appears:



Final Confirmation

? Are you sure you want to delete?

**Cancel** **OK**

3. Click **OK**, and then click **Done**.



Company Car Registration

This page displays all the company cars that have been registered. Click **New** to register another car.

Reimbursement Method: Company Car - Variable Rates

**New**

Vehicle ID ▲	Vehicle Type	Active
189510394	Default	Yes
29347520934572098	Default	Yes

**Done**



## Section 4: Configure Personal Car Registration

**NOTE:** This feature is only available to clients using the Expense product and is not applicable to all countries.

On the **Users** page, you can register a personal car for a user and correct the initial distance for a registered car.

### Register a Personal Car for a User

► **To register a personal car for a user:**

1. On the **Edit Users** page for the desired user, click **Personal Car**.

**NOTE:** The **Personal Car** button does not appear when creating a new user. Save the new user and then reopen the page.

2. Click **New**.

3. Fill in the fields.

Field	Description
Vehicle ID	The identifier for the vehicle. The user will select this value when creating a mileage expense.
Vehicle Type	Select the vehicle type.
Is Preferred	Select (enable) this check box to set this car to the preferred car to use. The preferred car will be used as the default car whenever the user enters a mileage expense.

- Click **Save**. The vehicle appears on the **Personal Car Registration** page and the **Accumulated Distance to Date (this period)** and **Initial Distance** fields appear on the page

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.

Reimbursement Method: Personal Car - Variable Rates

Period for Distance Limits: Annually

Starting Month: April

Starting Day: 6

Accumulated distance to date (this period): 0 MILE

Initial Distance: 0 MILE

**New**

Vehicle ID ▲	Vehicle Type	Active
27948725039740	Diesel - Over 2000cc	Yes

**Done**

- Click **Done**.

## Correct the Business Distance for a Registered Car

### ► To correct the business distance for a registered car:

- On the **Users** page, double click the user whose information you want to correct. The **Users** page appears.
- Click **Personal Car**.
- Select a car from the **Vehicle ID** list.

**New**

Vehicle ID ▲	Vehicle Type	Active
27948725039740	Diesel - Over 2000cc	Yes

**Done**

The **Edit Car** page appears.

- In the **Business Distance** field, enter the desired the value.

Edit Car

Business Distance \* 1400

Vehicle ID \* 27948725039740

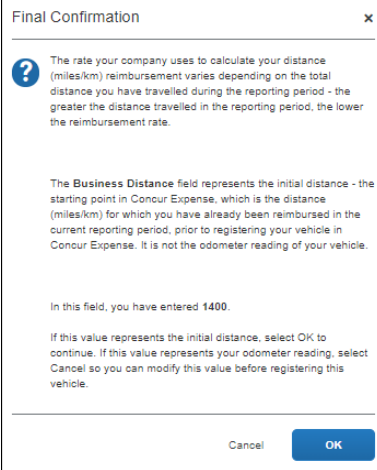
Vehicle Type \* Diesel - Over 2

☐ Is Preferred

**Save** **Remove** Cancel

- Click **Save**.

The **Final Confirmation** message appears.



**Final Confirmation** [X]

**?** The rate your company uses to calculate your distance (miles/km) reimbursement varies depending on the total distance you have travelled during the reporting period - the greater the distance travelled in the reporting period, the lower the reimbursement rate.

The **Business Distance** field represents the initial distance - the starting point in Concur Expense, which is the distance (miles/km) for which you have already been reimbursed in the current reporting period, prior to registering your vehicle in Concur Expense. It is not the odometer reading of your vehicle.

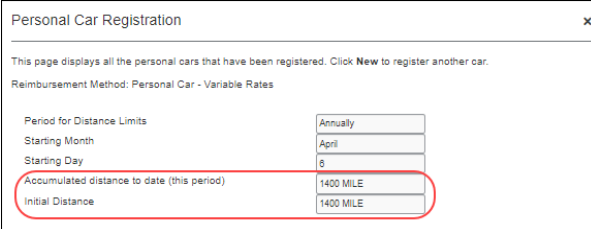
In this field, you have entered 1400.

If this value represents the initial distance, select OK to continue. If this value represents your odometer reading, select Cancel so you can modify this value before registering this vehicle.

Cancel OK

- Confirm the information is correct and then click **OK**.

The information in the **Accumulated Distance to Date (this period)** and **Initial Distance** fields is updated to reflect the change.



**Personal Car Registration** [X]

This page displays all the personal cars that have been registered. Click **New** to register another car.

Reimbursement Method: Personal Car - Variable Rates

Period for Distance Limits	Annually
Starting Month	April
Starting Day	8
Accumulated distance to date (this period)	1400 MILE
Initial Distance	1400 MILE

## Section 5: Configure Delegates

An administrator can specify who can act as a delegate for a user. The administrator can also make the user he is administering a delegate for another user.

Delegates can be enabled for Concur Expense, Request, Invoice, and/or Purchase Request. The actions a delegate can perform for a user depend on the product they are assigned to delegate, and which actions the administrator has enabled for them. For example, a delegate can be enabled to prepare expenses and submit reports, but not enabled to approve expenses or receive expense-related emails for the user.

### Assign a Delegate to a User

The delegates interface consists of two pages, **Delegates** and **Delegate For**.

On the **Delegates** page the administrator can add delegates who can act on behalf of the user. On the **Delegate For** page, the administrator can assign the user to act on behalf of others.

► **To assign a delegate to a user on the Delegates page:**

1. On the **Add User** or **Edit User** page, in the **Products** section, click the tab for the product to which you want to assign the delegate.
2. In the **Settings** section click **Expense Delegates**, **Request Delegates**, **Invoice Delegates**, or **Purchase Request Delegates**.

**Products**

Expense \* Request Invoice

**Settings**

Expense Delegates

☐ Exempt from Expense Type Limit rules?

Reimbursement Method \*

Company Check (via Accounts Payable) ▼

3. On the **Delegates** page, click **Add**.

**Expense Delegates**

Delegates Delegate For

**Expense Delegates for Company Admin**

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Receives Approval Emails
<input type="checkbox"/> Allison, Admin AdminAllison@Debs_Standard_Entity1.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Close

4. In the search field, enter the desired delegate's name, email address, employee id, or login id.

5. In the search results, click the desired delegate, and then click **Add**.

6. To the right of the delegate's name, choose the actions you want the delegate to be able to perform on behalf of the user, and then click **Save**.

You can click **Add** to add another delegate or click **Close**.

► **To assign a user to delegate for others on the Delegate For page:**

1. On the **Add User** or **Edit User** page, in the **Products** section, click the tab of the product for which you want this user to act as delegate.
2. In the **Settings** section click **Expense Delegates**, **Request Delegates**, **Invoice Delegates**, or **Purchase Request Delegates**.
3. Click the **Delegate For** tab.

4. On the **Delegate For** page, in the search field, enter the name, email address, employee id, or login id of the user for whom you want this user to act as delegate.

5. In the search results, click the desired user, and then click **Add**.
6. To the right of the user's name, choose the actions you want the delegate to be able to perform, and then click **Save**.

You can click **Add** to add another user or click **Close**.

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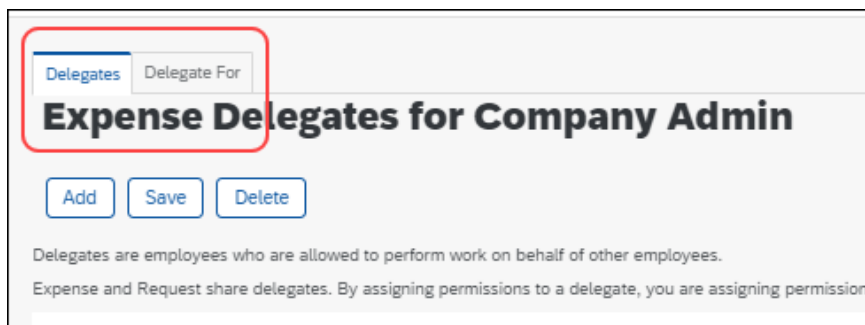
**NOTE:** The list of delegates and users being delegated appears on the delegate pages for both the user and the user for who they can act as delegate.

---

## Edit or Delete an Existing Delegate or Delegated User

### ► To edit an existing delegate:

1. On the **Add User** or **Edit User** page, in the **Products** section, click the tab for the desired product.
2. In the **Settings** section click **Expense Delegates**, **Request Delegates**, **Invoice Delegates**, or **Purchase Request Delegates**.
3. To edit the actions a delegate can perform for *this* user, click the **Delegates** tab. To edit the actions this user can perform for *another* user, click the **Delegate For** tab.



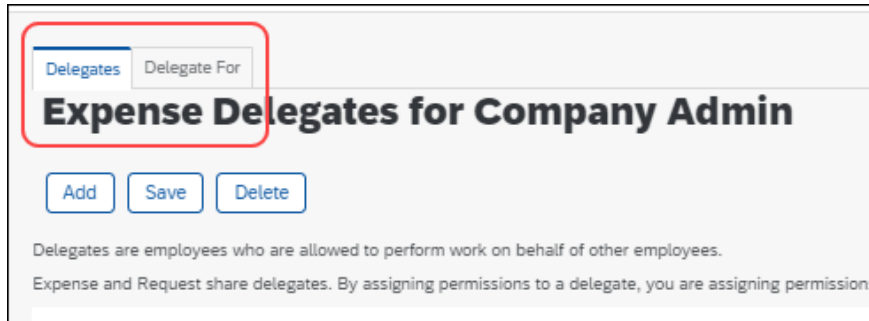
4. In the row for the relevant delegate or user, select (check) the actions you want the delegate to be able to perform for the user, or deselect (uncheck) the actions you no longer want the delegate to be able to perform for the user.

<input type="checkbox"/> Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Receives Approval Emails
<input type="checkbox"/> Expense, CanAdminister CanAdminister@Debs_Standard_Entity1.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

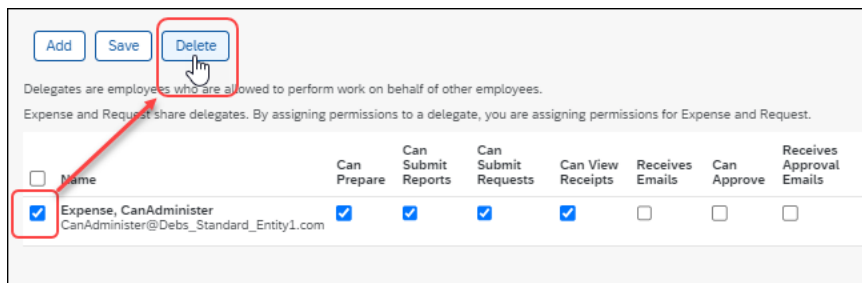
5. Click **Save**.
6. When you have made and saved the desired changes, click **Close**.

► **To delete a delegate or user:**

1. On the **Add User** or **Edit User** page, in the **Products** section, click the tab for the desired product.
2. In the **Settings** section click **Expense Delegates**, **Request Delegates**, **Invoice Delegates**, or **Purchase Request Delegates**.
3. To delete a delegate, click the **Delegates** tab. To delete a user for whom this user acts as a delegate, click the **Delegate For** tab.



4. Select (check) the box to the left of the relevant delegate or user's name, and then click **Delete**.



5. Click **Close**.

## Section 6: Import Users

The User Import process has four steps:

1. Download the spreadsheet.
2. Populate the spreadsheet.
3. Import the spreadsheet.
4. View the field validation and import results.

### Download the Spreadsheet

The administrator can download and use a template spreadsheet (.xls) to import or update multiple users. If no users have been added when the template is

downloaded, the template will contain one entry for the company admin who is added when an SAP Concur entity is created. If additional users have already been entered into the system manually or by performing a user import, the template will export all existing, active users.

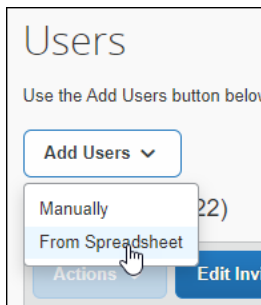
---

**NOTE:** Inactive users are not included in the downloaded spreadsheet.

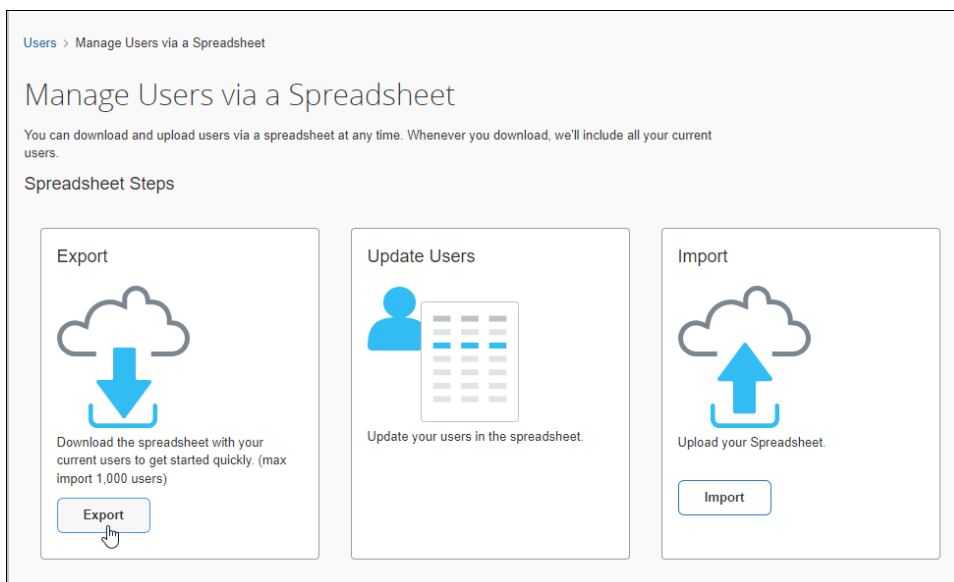
---

► **To download the spreadsheet:**

1. On the **Users** page, click **Add Users**, and then click **From Spreadsheet**.



2. On the **Manage Users via a Spreadsheet** page, click **Export**.



3. Save the spreadsheet to your local machine.

---

**NOTE:** The steps for saving the downloaded file differ depending on which web browser you are using.

---



## ***Edit Multiple Users***

The downloaded spreadsheet includes all existing active users and required field data from the **Users** page. The columns in the spreadsheet differ depending on your configuration and might include custom fields. The downloaded spreadsheet does not include passwords, credit card, or banking information. Once the spreadsheet is populated with new or updated data, the spreadsheet can be imported into SAP Concur solutions.

---

**NOTE:** If an existing user is removed from the spreadsheet, the user data will remain unchanged in the system. If a data field is blank for an existing user, the data field will remain unchanged for the user.

---

## **Populate the Spreadsheet**

The spreadsheet contains columns that correspond to fields in the **User Information** and **User Permissions** sections of the **Users** page. The heading for columns that represent required fields have a red background. The values in the spreadsheet header rows (rows 1 and 2) must not be edited or deleted. Do not change the name of the spreadsheet tab.

## ***Gathering User Information***

The import spreadsheet's required fields are the basic information that SAP Concur products require to create a user account.

Although existing credit card, and banking information is not including in the downloaded template, the administrator can add or change bank account, and credit card information as part of the import process.


The user information is generally gathered from the company's HR or Payroll system. Enter the data into the provided template spreadsheet fields, in the formats listed in the table below.

The administrator can create new users and update existing users. SAP Concur products use the Employee ID value to determine whether the user is a new user or an existing user. If there is an existing user with this Employee ID, the user's data is updated with the data provided in the spreadsheet. When updating an existing user, a user's information is only updated if a value is provided in the spreadsheet field. The import process does not update a user's information for fields that are blank in the spreadsheet. If no user has the supplied Employee ID, SAP Concur adds them as a new user.

## ***User Import Fields***

The fields that appear in the user import template vary depending on your configuration. The columns in the spreadsheet correspond to the fields that appear on the **Users** page.

**NOTE:** There is a known issue with Internet Explorer when large files are imported. When importing files that contain over 500 records, the interface may become unresponsive. Clients that are experiencing this issue should use a different browser to import the file.

Field	Required?	Description
Employee Administration Country/Region (only displays when there is more than one country implemented)	Y	<p>Valid two-character ISO country code for the country the user resides in. This field assigns the country from which the user is administered. Depending on the country code selected, the policies applying for the specific country apply to the employee.</p> <p><b>Format:</b> XX (two-character ISO country code)  <b>Example:</b> CA, IE, UK, US  Canada represents as CA  Ireland represents as IE  United Kingdom represents as UK  United States represents as US</p> <p> Refer to the Appendix in this guide for a full list of Country Codes.</p>
Expense Policy Group	N	<p>This field allows you to assign a policy group to each employee that will determine the expense types and limits that will apply to this employee. Populate this field using the Group Code for the policy group as displayed on the <b>Policy Groups &gt; Expense</b> page.</p> <p>If you do not populate this information, the employee will be assigned to the country-specific default configuration policy based on their Employee Administration Country.</p>
Invoice Policy Group	N	<p>This field allows you to assign a policy group to each employee that will determine the expense types and limits that will apply to this employee. Populate this field using the Group Code for the policy group as displayed on the <b>Policy Groups &gt; Invoice</b> page.</p> <p>If you do not populate this information, the employee will be assigned to the default configuration policy.</p>
Employee First Name	Y	The user's first name. If implementing Travel ensure this name is the same as the photo ID an employee would use through security checkpoints because the Employee Name prints on the Travel itinerary.
Employee Last Name	Y	The user's last name.
Middle Name	N	The user's middle name.

Field	Required?	Description
Employee ID	Y	The unique identifier for the user. If you use ERP to reimburse your employees, this field contains the ERP Vendor Name of the user. <b>NOTE:</b> You cannot use this field in this import to update the employee ID for an existing user. Instead, use the <b>Employee ID</b> field available in the <b>Users</b> page to update existing users.
Login ID	Y *	Use for the initial import into the system of any new user's login ID, which is usually the same as the user's email address. <b>Format:</b> Must contain "@" <b>* NOTE:</b> The administrator cannot use this field to update login IDs for existing users and so is not a Required field under that condition. Instead, use the <b>New Login ID</b> field in this import to update existing users.
Email Address	Y	The user's email address. Concur recommends using the user's corporate email address. <b>Format:</b> Must contain "@"
Country of Residence	Y	The name of the country in which the user resides. <b>Format:</b> Country Name <b>Example:</b> United States, Finland, Czech Republic
State/Province	N	The user's two-character ISO country code and two-character state or province. <b>Format:</b> XX-XX ([country code]-[state/province]) <b>Example:</b> US-WA, CA-BC Washington, US is represented as US-WA. British Colombia, CA is represented as CA-BC.
Locale	Y	The language and notational convention (e.g., date, number, and currency formats) for this user. <b>Format:</b> Language (Country Name) <b>Example:</b> German (Austria), English (United States), Japanese (Japan)
Reimbursement Currency	Y	The user's three-character reimbursement currency code. <b>Format:</b> XXX <b>Example:</b> United States Dollar is represented as USD. Canadian Dollar is represented as CAD.

Field	Required?	Description
Invoice User Country	N	This indicates the client's country with pre-configured Invoice features.
Custom 1-20 Code <b>NOTE:</b> These only appear if you selected fields on the <b>Custom Fields</b> page of Product Settings. The column name shows the data field name.	Varies	The custom fields on the Users page. These only appear if you selected fields on the <b>Custom Fields</b> page of Product Settings. These fields are only required if you set them as required in Product Settings. The values entered must be the field codes, not the names of the fields.  <b>NOTE:</b> Best practice is to <b>not</b> allow personal, sensitive, or uniquely identifying information in custom fields.
Active	Y	Is user active? Format: Y/N
Submits Expense Reports	N	Can this user access Expense? Format: Y/N/Blank
Approves Expense Reports	N	Is this user an expense approver? Format: Y/N/Blank
Processes Expense Reports	N	Is this user an expense report processor? Format: Y/N/Blank
Books Travel	N	Can this user book travel? Format: Y/N/Blank
Submits Requests	N	Can this user access Request? Format: Y/N/Blank
Approves Requests	N	Is this user a request approver? Format: Y/N/Blank
Request Approver Employee ID	N	The employee ID value of the user that can approve this user's requests.
Request Approver Employee ID 2	N	This field is not currently used.
Expense Approver Employee ID	N	The employee ID value of the user that can approve this user's expense reports.
Expense Approver Employee ID 2	N	The employee ID value of the second report approver.  <b>NOTE:</b> This is used only when the second approver workflow is selected.
Is Invoice Owner?	N	This user can create and submit invoices.

Field	Required?	Description
Is Invoice Approver?	N	This user has the responsibility of approving invoices. The user's name will appear in the <b>Manager</b> list of the <b>Users</b> page, and will appear in the list of approvers that the user sees when they do not have a manager defined.
Is Invoice AP User?	N	This user can create, assign, and unassign invoices. He/she can also delete an invoice and restore the invoice from the deleted state.
Invoice Approver Employee ID	N	The employee ID value of the user that can approve this user's invoices.
Invoice_PMT_Manager	N	This user is responsible for payment manager tasks, such as view and manage batches of invoices, and run, search for, and download imports and extracts.
Credit Card Name On Card	N	The name on the user's company card.
Credit Card Payment Type Name	N	The payment type name for the credit card, as entered in the <b>What do you want to name this card program?</b> field on the Payment Types page of Product Settings.
Card Account Number	N	The company card number. Format: No dashes or spaces.
Card Effective Date	N	The date that the card was assigned to the user in Concur. Concur will only display card transactions to the user if they occur after the card effective date. Format: dd/mm/yyyy
Card Clearing Account Code	N	The clearing account code for company card.
Card Type	N	The type of credit card.
Expiration Date	N	The card expiration date, as it appears on the card. When the card does not specify a day value, use the last day of the month. Format: dd/mm/yyyy
Billing Address	N	The card's billing address line one.
Billing City	N	The card's billing address city.
Billing State	N	The card's billing address state.
Billing Postal Code	N	The card's billing address postal code.
Billing Country Code	N	The card's billing address country code.
Bank Routing Number	N	The bank number for user's bank account. Format: No spaces or dashes. For US employees, must be 9 digits.

Field	Required?	Description
Bank Account Number	N	The user's bank account number. Format: No spaces or dashes.
Bank Account Type	N	The type of bank account. CH: Checking SA: Savings Format: CH/SA <b>NOTE:</b> This column only appears for US accounts.
Bank Account Currency Code	N	The three character currency code for the bank account. Format: XXX Example: USD, CAD
Bank Account Is Active	N	Is the bank account active? Format: Y/N
Bank Account Country Code	N	The two-letter, ISO Country Code where the employee's bank is located. Format: XX Example: Canada is represented as CA. United Kingdom is represented as GB. United States is represented as US.
Bank Account Branch Name	Not required for CA and US; Required for UK and SEPA countries.	The name of the user's bank. Format: 48 characters maximum.
Bank Account Branch Location	Not required for CA and US; Required for UK and SEPA countries.	The branch identifier for the bank that the account was opened at. Can be a town, neighborhood, or other identifier. Format: 30 characters maximum.
Bank Account Name on Account	Not required for CA and US; Required for UK and SEPA countries.	The name that appears on the account. Typically, the employees name. Format: 48 characters maximum.

Field	Required?	Description
BankAccountAddress1	Not required for CA and US; Required for UK and SEPA countries.	The postal address provided to the bank for this bank account. Format: 48 characters maximum.
BankAccountAddress2	Not required for CA and US; Required for UK and SEPA countries.	The postal address provided to the bank for this bank account. Format: 48 characters maximum.
Bank Account City	Not required for CA and US; Required for UK and SEPA countries.	The postal address provided to the bank for this bank account. Format: 24 characters maximum.
Bank Account Region	Not required for CA and US; Required for UK and SEPA countries.	The postal address provided to the bank for this bank account. Format: 24 characters maximum.
Bank Account Postal Code	Not required for CA and US; Required for UK and SEPA countries.	The postal address provided to the bank for this bank account. Format: 20 characters maximum.
Is Purchase Request User?	N	Users with this role can create purchase requests (the "Requester"). Format: Y/N/Blank
Is Purchase Request Approver?	N	Users with this role can approve purchase requests that the purchase request user has created. Format: Y/N/Blank
Purchase Request Approver Employee ID	N	The employee ID of the purchase request approver.
ADP Employee File Number	N	The identifier for the employee within ADP. This field is required if the ADP reimbursement type is used.

Field	Required?	Description
ADP Company Code	N	The company code for the employee within ADP. This field is required if the ADP reimbursement type is used.
ADP Deduction Code	N	The deduction code for the employee within ADP. This field is required if the ADP reimbursement type is used.
SyncAccountToTravel	N	This field is not currently used.
Prefix Name	N	If provided, must contain one of these exact values (Lord, Lady, Sir, Mr., Miss, Ms., Mrs., Dr., Rev.)
Suffix Name	N	If provided, must contain one of these exact values (Jr., Sr., I, II, III, IV, V)
Preferred Name (previously Nickname)	N	Chosen name that differs from the employee's legal name by which the employee prefers to be addressed in SAP Concur solutions.
Gender	N	M = Male F = Female
Birth Date	N	Must match format "YYYYMMDD".
Job Title	N	The employee's job title.
Work Phone Number	N	The employee's work phone number.
Work Phone Extension	N	The employee's work phone extension.
Fax Number	N	The employee's fax number.
Cell Phone Number	N	The employee's cell phone number.
Home Phone Number	N	The employee's home phone number.
Pager Number	N	The employee's pager number.
Travel Name Remark	N	Value used by TMCs to capture certain reportable items for individual travelers, such as department codes. You should only provide this information if your TMC has requested that you do so.
Rule Class	N	The employee's travel class name. If no value is provided, the user is assigned to the default travel class.
GDS Profile Name	N	The name of the profile in the GDS system. This value associates a Concur Travel profile to the GDS profile.
Org Unit	N	Value must exactly match an Org Unit value set up for the company.
Home Street	N	The employee's home address.
Home City	N	The employee's home address.



Field	Required?	Description
Home State	N	The employee's home address.
Home Postal Code	N	The employee's home address.
Home Country	N	The employee's home address.
Work Street	N	The employee's work address.
Work City	N	The employee's work address.
Work State	N	The employee's work address.
Work Postal Code	N	The employee's work address.
Work Country	N	The employee's work address.
Email 2	N	Alternate email for the employee.
Email 3	N	Alternate email for the employee.
XML Profile Synch ID	N	<p>The unique, client-assigned Travel user identifier that allows the user profile to be synchronized with other vendors.</p> <p>IMPORTANT: The following characters cannot be used as a value for this record: % [ ' # ! * &amp; ( ) ~ ` { - ^ } \   / ? &gt; &lt; , ; : " + = ]</p> <p><b>NOTE:</b> This field is for updates only. Blanks and spaces intended to remove existing data are ignored as values during import. This means that it is not possible to bulk delete this data for many users with a single import file.</p>
Profile User	N	<p>Allows access to Travel and allows profiles to be saved to the GDX or external XML synchronizing tools, but user cannot book trips through the Travel Wizard.</p> <p>Format: Y/N</p>
Amadeus User	N	<p>Indicates if the user can have trips imported from AeTM.</p> <p>Format: Y/N</p> <p><b>NOTE:</b> Although still displayed, this field is no longer active, and any values it contains will be ignored by the system.</p>
Travel Custom Fields 1 - 50	N	<p>Custom fields configured in Travel appear here. The formats vary depending on configuration.</p> <p><b>NOTE:</b> Best practice is to <i>not</i> allow personal, sensitive, or uniquely identifying information in custom fields.</p>

Field	Required?	Description
Reimbursement Type	N	This field specifies the reimbursement method for the employee's reports. The supported values are: ADPPAYR: ADP Payroll CNQRPAY: Expense Pay by Concur APCHECK: Accounts Payable/Company Check
New Login ID	Y *	Use to change an existing user's login ID in the system, which is usually the same as the user's email address. <b>Format:</b> Must contain "@" <b>* NOTE:</b> The administrator should not use this field to import the login ID for a new employee. Instead, use the <b>Login ID</b> field in this import to import this value for a new user. <b>NOTE:</b> The LoginID must be unique across all Concur products. If a LoginID is currently in use in any Concur product, it cannot be assigned again unless the original occurrence is changed. For example, assume that a LoginID was assigned in error. That LoginID can only be used again if an admin (either manually or via import) renames the original occurrence, allowing the LoginID to be used again.
Is Central Receiver?	N	This field specifies the central receiver who can add, edit, and delete receipts and receipt images.

### Final File Review

Before you import the user spreadsheet, verify that the spreadsheet is formatted correctly.

All cells in the Excel spreadsheet must have a designation of Text or Number before being uploaded. Always verify the cell formatting when done. If you use the Replace feature in Excel, be aware that it may not maintain the required cell formatting. Testing has shown that cells formatted as text become general format after using Replace. If the cells are not formatted as text, the import fails. If necessary, select the appropriate cells and change the formatting.

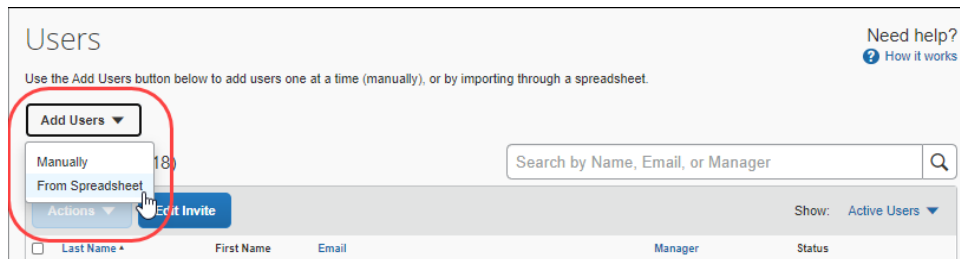
### Upload the User Data Spreadsheet

The spreadsheet is imported from the **Manage Users via a Spreadsheet** window. If an existing user is removed from the spreadsheet, the user data will remain unchanged in the system. If a data field is blank for an existing user, the data field will remain unchanged for the user.

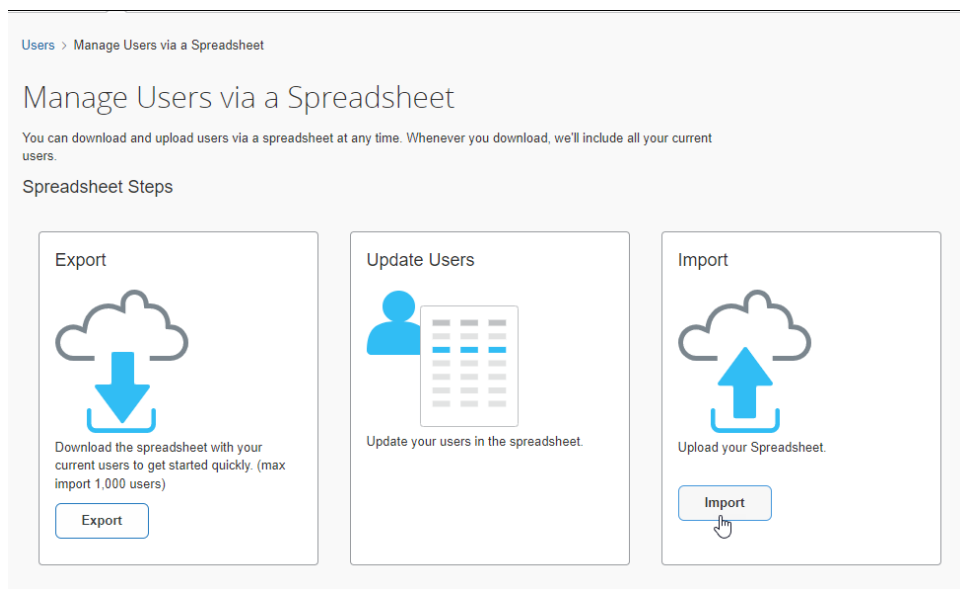
**NOTE:** There is a known issue with Internet Explorer when large files are imported. When importing files that contain over 500 records, the interface may become unresponsive. Clients who are experiencing this issue should use a different browser to import the file.

► **To import the spreadsheet:**

1. On the **Users** page, click **From Spreadsheet**.

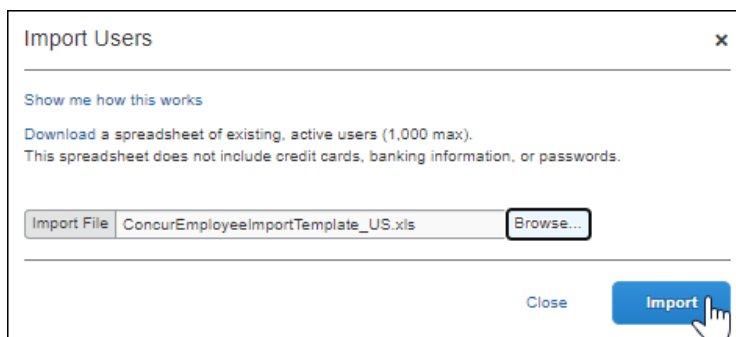


2. On the **Manage Users via a Spreadsheet** page, click **Import**.

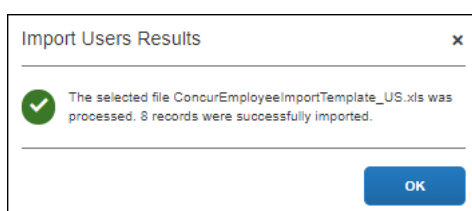


3. In the **Import Users** window, click **Browse**.
4. Navigate to the user import file you populated, select the file, and then click **Open**.

5. In the **Import Users** window, click **Import**.



The **Import Users Result** window is presented.



## View the Field Validation and Import Results

If there are no errors during the import, the **Import Users Results** window displays a message confirming the number of records that were imported.

If any errors are encountered during the import process, the **Import Users Results** window displays the number of records processed, the number of records imported, the number of records that failed field validation, the number of records rejected, the **Field Validation Errors** section, and the **Import Result Errors** section. The **Import Users Results** page also provides links to view the details of the records that produced errors.

Import Users Results

Records processed: 10

Successful: 8

Failed field validation: 2 (Review these results in the "Field Validation Errors" grid below.)

Rejected: 0 (Review these results in the "Import Result Errors" grid below.)

Field Validation Errors

Record Number	Error Message	Action
11	The combination of Employee ID and Login ID or Employee ID and Employee Last Name must be unique.	<a href="#">View Record</a>
12	A value is missing for Column 'Employee Administration Country' A value is missing for Column 'Employee First Name' A value is missing for Column 'Employee Last Name' A value is missing for Column 'Email Address' A value is missing for Column 'Country of Residence' A value is missing for Column 'Locale' A value is missing for Column 'Reimbursement Currency' A value is missing for Column 'Active' The combination of Employee ID and Login ID or Employee ID and Employee Last Name must be unique.	<a href="#">View Record</a>

Import Result Errors

There were no rejected user records

Close

Field validation enables administrators to identify records that need to be corrected before or after being imported. The field validation process verifies that required fields have values and that the data being imported matches the data type of the field into which the data will be imported.

The administrator can use the **Import Result Errors** section to view the status of the import as well as the import details, including any errors generated. The section displays the status of all imports, the number of records processed and the number of records rejected. This list is sorted in descending order by the time the administrator imported the file. The administrator can view details about:

- **Records processed:** The number of records processed through field validation.
- **Successful:** The number of records that met all field validation requirements.
- **Failed field validation:** The number of records that failed one or more field validation requirements.
- **Rejected:** The number of records that were not imported due to field validation failures.
- **Field Validation Errors:** This section provides details about user records that were imported with errors.
- **Import Result Errors:** This section provides information about rejected user records.

## Update an Existing User's Employee ID

Administrators can update an existing user's employee ID by adding the NewEmployeeID column to the user import spreadsheet and importing the updated spreadsheet.

When the import is complete, the **Employee ID** field on the **Users** page will be updated with the entry from the **NewEmployeeID** column for each user that you added or modified an employee ID for on the user import spreadsheet.

If the **NewEmployeeID** column cell is left blank, the import will not change the current value in the **Employee ID** field on the **Users** page for that user.

► **To update an existing user's Employee ID:**

1. Open the user import spreadsheet.

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**NOTE:** If you have not yet downloaded the spreadsheet, follow the procedure in the *Download the Spreadsheet* section to download the user import spreadsheet.

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2. Insert a new column in the spreadsheet. The new column can be inserted anywhere in the spreadsheet.
3. In row 1 of the new column, type *NewEmployeeID*. Row 1 must contain this exact field name.

E	F	G
EmployeeID	NewEmployeeID	LoginID
<b>Employee ID</b>		<b>Logon ID</b>
ps123456	ps123456@brooksdev.com	ps@brooksdev.com

4. Make sure all bold blue columns are populated for each existing user requiring a new employee ID. Columns with bold blue headings are required.
5. In the **NewEmployeeID** column, type the user's new employee ID.
6. Save the spreadsheet.
7. On the **Users** page, click **Import Users** to import the spreadsheet.
8. Verify that the **Employee ID** fields on the **Users** page have the employee IDs you entered in the **NewEmployeeID** spreadsheet columns for the existing users you updated.

## Section 7: Special Cases

This section covers information about special situations.

### About the Use of the Concur-Only System Record Roles

The client may come across roles granted only to Concur administrative personnel for the purpose of working within a client entity. These roles, such as ConcurAuditor, ConcurConsultant, and ConcurAdmin are secure "system" roles Concur uses on

behalf of the client to fulfill requests, troubleshoot, and maintain the overall integrity of the client entity.

The client may encounter these roles as they work with their employee and user imports – for example, the system record (CT\_EMPLOYEE.SYSTEM\_RECORD) or similar. They may be safely ignored as they are used by the application or Concur to secure the entity for use by the client.

## 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.

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**NOTE:** Expense Pay will process the payment demands normally.

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## Appendix

### Country Codes (as of March 2019)

Country	ISO Code
AFGHANISTAN	AF
ÅLAND ISLANDS	AX
ALBANIA	AL
ALGERIA	DZ
AMERICAN SAMOA	AS
ANDORRA	AD
ANGOLA	AO
ANGUILLA	AI
ANTARCTICA	AQ
ANTIGUA AND BARBUDA	AG
ARGENTINA	AR
ARMENIA	AM
ARUBA	AW
AUSTRALIA	AU
AUSTRIA	AT
AZERBAIJAN	AZ
BAHAMAS	BS
BAHRAIN	BH
BANGLADESH	BD
BARBADOS	BB
BELARUS	BY
BELGIUM	BE
BELIZE	BZ
BENIN	BJ
BERMUDA	BM
BHUTAN	BT
BOLIVIA	BO
BONAIRE, SAINT EUSTATIUS AND SABA	BQ
BOSNIA AND HERZEGOVINA	BA

Country	ISO Code
BOTSWANA	BW
BOUVET ISLAND	BV
BRAZIL	BR
BRITISH INDIAN OCEAN TERRITORY	IO
BRUNEI DARUSSALAM	BN
BULGARIA	BG
BURKINA FASO	BF
BURUNDI	BI
CAMBODIA	KH
CAMEROON	CM
CANADA	CA
CAPE VERDE	CV
CAYMAN ISLANDS	KY
CENTRAL AFRICAN REPUBLIC	CF
CHAD	TD
CHILE	CL
CHINA	CN
CHRISTMAS ISLAND	CX
COCOS (KEELING) ISLANDS	CC
COLOMBIA	CO
COMOROS	KM
CONGO, Democratic Republic of	CD
CONGO, People's Republic of	CG
COOK ISLANDS	CK
COSTA RICA	CR
COTE D'IVOIRE	CI
CROATIA	HR
CUBA	CU
CURAÇAO	CW



Country	ISO Code
CYPRUS	CY
CZECH REPUBLIC	CZ
DENMARK	DK
DJIBOUTI	DJ
DOMINICA	DM
DOMINICAN REPUBLIC	DO
ECUADOR	EC
EGYPT	EG
EL SALVADOR	SV
EQUATORIAL GUINEA	GQ
ERITREA	ER
ESTONIA	EE
ETHIOPIA	ET
FAEROE ISLANDS	FO
FALKLAND ISLANDS (MALVINAS)	FK
FIJI	FJ
FINLAND	FI
FRANCE	FR
FRENCH GUIANA	GF
FRENCH POLYNESIA	PF
FRENCH SOUTHERN TERRITORIES	TF
GABON	GA
GAMBIA	GM
GEORGIA	GE
GERMANY	DE
GHANA	GH
GIBRALTAR	GI
GREECE	GR
GREENLAND	GL

Country	ISO Code
GRENADA	GD
GUADELOUPE	GP
GUAM	GU
GUATEMALA	GT
GUERNSEY	GG
GUINEA	GN
GUINEA-BISSAU	GW
GUYANA	GY
HAITI	HT
HEARD AND MC DONALD ISLANDS	HM
HONDURAS	HN
HONG KONG, CHINA	HK
HUNGARY	HU
ICELAND	IS
INDIA	IN
INDONESIA	ID
IRAN (ISLAMIC REPUBLIC OF)	IR
IRAQ	IQ
IRELAND	IE
ISLE OF MAN	IM
ISRAEL	IL
ITALY	IT
JAMAICA	JM
JAPAN	JP
JERSEY	JE
JORDAN	JO
KAZAKHSTAN	KZ
KENYA	KE
KIRIBATI	KI

Country	ISO Code
KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF	KP
KOREA, REPUBLIC OF	KR
KUWAIT	KW
KYRGYZSTAN	KG
LAO PEOPLE'S DEMOCRATIC REPUBLIC	LA
LATVIA	LV
LEBANON	LB
LESOTHO	LS
LIBERIA	LR
LIBYA	LY
LIECHTENSTEIN	LI
LITHUANIA	LT
LUXEMBOURG	LU
MACAO, CHINA	MO
MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF	MK
MADAGASCAR	MG
MALAWI	MW
MALAYSIA	MY
MALDIVES	MV
MALI	ML
MALTA	MT
MARSHALL ISLANDS	MH
MARTINIQUE	MQ
MAURITANIA	MR
MAURITIUS	MU
MAYOTTE	YT
MEXICO	MX
MICRONESIA, FEDERATED STATES OF	FM
MOLDOVA, REPUBLIC OF	MD

Country	ISO Code
MONTENEGRO	ME
MONTSERRAT	MS
MONACO	MC
MONGOLIA	MN
MOROCCO	MA
MOZAMBIQUE	MZ
MYANMAR	MM
NAMIBIA	NA
NAURU	NR
NEPAL	NP
NETHERLANDS	NL
NEW CALEDONIA	NC
NEW ZEALAND	NZ
NICARAGUA	NI
NIGER	NE
NIGERIA	NG
NIUE	NU
NORFOLK ISLAND	NF
NORTHERN MARIANA ISLANDS	MP
NORWAY	NO
OMAN	OM
PAKISTAN	PK
PALAU	PW
PALESTINE	PS
PANAMA	PA
PAPUA NEW GUINEA	PG
PARAGUAY	PY
PERU	PE
PHILIPPINES	PH

Country	ISO Code
PITCAIRN	PN
POLAND	PL
PORTUGAL	PT
PUERTO RICO	PR
QATAR	QA
REUNION	RE
ROMANIA	RO
RUSSIAN FEDERATION	RU
RWANDA	RW
SAINT BARTHÉLEMY	BL
SAINT HELENA, ASCENSION AND TRISTAN DA CUNHA	SH
SAINT KITTS AND NEVIS	KN
SAINT LUCIA	LC
SAINT MARTIN	MF
SAINT VINCENT AND THE GRENADINES	VC
SAMOA	WS
SAN MARINO	SM
SAO TOME AND PRINCIPE	ST
SAUDI ARABIA	SA
SENEGAL	SN
SERBIA	RS
SEYCHELLES	SC
SIERRA LEONE	SL
SINGAPORE	SG
SINT MAARTEN (DUTCH PART)	SX
SLOVAKIA (Slovak Republic)	SK
SLOVENIA	SI
SOLOMON ISLANDS	SB
SOMALIA	SO

Country	ISO Code
SOUTH AFRICA	ZA
SOUTH GEORGIA AND THE SOUTH SANDWICH ISLANDS	GS
SOUTH SUDAN	SS
SPAIN	ES
SRI LANKA	LK
ST. PIERRE AND MIQUELON	PM
SUDAN	SD
SURINAME	SR
SVALBARD AND JAN MAYEN ISLANDS	SJ
SWAZILAND	SZ
SWEDEN	SE
SWITZERLAND	CH
SYRIAN ARAB REPUBLIC	SY
TAIWAN, CHINA	TW
TAJIKISTAN	TJ
TANZANIA, UNITED REPUBLIC OF	TZ
THAILAND	TH
TIMOR-LESTE	TL
TOGO	TG
TOKELAU	TK
TONGA	TO
TRINIDAD AND TOBAGO	TT
TUNISIA	TN
TURKEY	TR
TURKMENISTAN	TM
TURKS AND CAICOS ISLANDS	TC
TUVALU	TV
UGANDA	UG
UKRAINE	UA

Country	ISO Code
UNITED ARAB EMIRATES	AE
UNITED KINGDOM	GB
UNITED STATES	US
UNITED STATES MINOR OUTLYING ISLANDS	UM
URUGUAY	UY
UZBEKISTAN	UZ
VANUATU	VU
VATICAN CITY STATE (HOLY SEE)	VA
VENEZUELA	VE
VIET NAM	VN
VIRGIN ISLANDS (BRITISH)	VG
VIRGIN ISLANDS (U.S.)	VI
WALLIS AND FUTUNA ISLANDS	WF
WESTERN SAHARA	EH
YEMEN	YE
ZAMBIA	ZM
ZIMBABWE	ZW

