Concur Expense: Sponsored Guest User Setup Guide

Last Revised: July 22, 2020

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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Sponsored Guest User

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (view but not create or edit).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company’s SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP. In this case, the client must initiate a service request with support.
Section 2: Two User Interfaces for Concur Expense End Users

SAP is in the process of transitioning from the *existing* user interface (existing UI) to the new user interface (NextGen UI).

NextGen UI brings some long-awaited usability enhancements – some are significant (involving new pages and processes) while others are minor (involving only look-and-feel).

⚠️ **IMPORTANT:** Be aware that the NextGen UI enhancements affect *only* the end-user experience. Approvers and processors will still use the existing UI.

This Guide – What the User Sees

During this transition period – as clients are moving from the existing UI to NextGen UI – this guide will show both UIs. If there is an end-user screen sample that shows the existing UI, then there will be a NextGen UI sample as well.
Transition Guide for End Users

A detailed end-user guide is available. It describes all changes in NextGen UI.

Section 3: Overview

Sponsored guests are non-employees who need to be reimbursed for expenses. Some examples are: Interns, Candidates for Hire, Contractors. SAP Concur's Sponsored Guest feature provides more visibility and control for sponsored guest expense reimbursement.

Administrators can create accounts in SAP that the guests use to book travel (if integrated with Travel) and record expenses. Each guest has a sponsor. The guest user can use the SAP Concur mobile app or ExpenseIt to record their out-of-pocket expenses, then sign in to SAP to complete their expense report.

The sponsor is typically the person who has agreed that the guest will be reimbursed for expenses, for example the hiring manager for a Candidate for Hire.

Integrated With Travel

Clients with Concur Expense integrated with Travel can use Sponsored Guest features in Travel in addition to the features in Concur Expense. Sponsored Guest does not require integration with Travel; however, Travel is required for the sponsored guest travel booking features.

For more information, refer to the Concur Travel: Sponsored Guest User Travel Service Guide.

Use Case

A corporate Vice President has an open requisition for a Director. Through the HR requisition process, the candidate is offered a live interview. The VP notifies his company's SAP Concur administrator, who then creates a new user profile for the candidate in SAP.

The admin is able to designate the candidate as a Candidate for Hire in the candidate's profile, using the Non-Employee User Type profile field. This allows the HR department to track costs specifically for recruits.

The admin assigns the VP as the candidate's sponsor in the Sponsor Name profile field. The admin also sets sponsorship start and end dates to define the sponsorship period. The admin can also assign the sponsored guest a delegate, if the company wants a delegate to create the guest's expense report. In most cases, the sponsor would be assigned as a delegate.

The admin saves the new user in SAP, and optionally uses the provided profile link to notify the candidate that they can now sign in to complete their profile, and/or self-book travel (if integrated with Travel).
The candidate signs in and completes their profile. The VP’s company uses Travel and allows self-booking, so the candidate also makes the appropriate travel reservations. Once the candidate's booking is reserved, the approval process sends the trip to the VP to be approved.

The VP can see all users they are sponsoring simply by viewing their own profile.

The candidate may use all the same tools that are available to employees to capture their expenses: Mobile for on-the-go capture of expenses and receipt images, and ExpenseIt for enhanced capture and OCR of receipts, for example. If a delegate is creating the actual expense report, this makes the process easier for that delegate to receive the expense information. If the candidate is creating their own expense report, it adds additional options for the candidate to capture the expense information.

If the company uses Expense Pay, the candidate may fill in the bank information in their SAP profile so that the candidate can be reimbursed for all expenses via direct deposit to their bank account.
Section 4: What the User Sees

What the Guest User Sees

Profile

The guest user's Profile view is slightly different. There is no Work Address section (normally located between the Company Information and Home Address sections), and the Assistants and Travel Arrangers section is read-only (if it appears at all). The guest user will also see any Sponsor-owned credit cards that the sponsor has allowed the guest user to use for travel booking (if integrated with Travel). The guest user can also register for the SAP Concur mobile app or ExpenseIt in their profile.
Expense Report

When the sponsored guest creates an expense report, their sponsor is associated with the expense report using a field in the report header. If that sponsored guest has more than one sponsorship at the same time, the guest user must select the correct sponsor during the expense report creation process. This provides the proper information to report reviewers and for later analytical reporting.
This sample shows the existing UI:

![Existing UI Image]

This sample shows NextGen UI:

![NextGen UI Image]

Note that the **Sponsor** field appears only if all of these conditions are met:

- The **Sponsor** field must be properly configured (not hidden from the user via field access), as described in the configuration information in this guide.
- The user must be marked as a non-employee in Profile, as described below.
- The user's sponsor must have a current sponsorship date range (date range valid as of the date of the report), as described below.
Section 4: What the User Sees

What the Sponsor Sees

Profile

In the sponsor's profile, the Sponsored Guest Users section displays all guest users that the employee is sponsoring.

NOTE: The Add a Sponsored Guest User link, Terminate Sponsorship button, and View Profile link are configurable and only appear when the sponsor is allowed to perform those actions.

Delegate View

The sponsor for the guest may be assigned delegate rights for the guest, and can create and submit expense reports on their behalf. If configured, the guest user will appear in the sponsor's list of users that the delegate assists.

Adding a Guest User

Depending on configuration, the sponsor may be allowed to create a guest user account.
To add a guest user:

1. Click Profile > Profile Settings.

2. Click Sponsored Guest Users (left menu).

3. In the Sponsored Guest Users section, click Add a Sponsored Guest User. The User Details page appears, displaying the Non-Employee Settings section with the sponsor selected.

4. Enter the general information about the guest user in the General Settings section.

**NOTE:** The login ID is a critical component of the guest user record, as this must be a unique identifier across all clients. Each company should determine the format to use for guest user accounts. An example might be to add guest to the end of your company’s domain, for example: JohnSmith@concurguest.com.

For more information about the user fields, refer to the Shared: User Administration User Guide.

5. In the Non-Employee Settings section, select the type of guest user.
6. Use the calendar to enter the **Sponsorship Start Date** and **Sponsorship End Date**.

![Calendar Image]

**NOTE:** The **Sponsorship End Date** field controls how long the guest user can book Travel. This is especially useful for Travel & Expense customers who want the user to continue to have access to the system for Expense report submission. Recording a sponsorship end date can also be useful for reporting purposes. **The User Administrator still must use the Account Termination Date field to completely terminate the user’s access.**

7. Click **Save**.

**NOTE:** After adding the guest user, the sponsor should contact their SAP Concur administrator, who can assign an expense approver to the user. If the client does not allow users to select approvers on report submission, this step is required.

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**Section 5: What the Processor Sees**

**Searching for Guest Users in Process Reports**

The Expense Processor can search for sponsored users by creating or editing a search query to use the sponsored guest fields:

- The Report data object has the **Has Sponsorship** field.
- The Employee data object has the **Is Non Employee** field.
Section 6: What the Admin Sees

Managing Guest Users

The User Administrator can perform all actions to manage guest users.

Adding a Guest User

To add a guest user:

1. Click Administration > Company (on the sub-menu) > Company Admin.

   **NOTE:** Depending on your permissions, the page may appear immediately after you click Administration.

2. Click User Administration (left menu).

3. Click Add a User. The User Details page appears, displaying the Non-Employee Settings section.
4. On the **User Details** page, enter the general information about the guest user in the **General Settings** section.

**NOTE:** The login ID is a critical component of the guest user record, as this must be a unique identifier across all clients. Each company should determine the format to use for guest user accounts. An example might be to add guest to the end of your company’s domain, for example: [JohnSmith@concurguest.com](mailto:JohnSmith@concurguest.com).

For more information about the user fields, refer to the *Shared: User Administration User Guide*.

5. In the **Non-Employee Settings** section, select the type of guest user.

6. Click **Edit** next to the **Sponsor Name** field to enter the sponsor information.

The **User Search** window appears.
NOTE: If a sponsor adds a new guest user from the Add a Sponsored Guest User link, then the Non-Employee Settings section will have that sponsor's information pre-populated, and the remainder of the non-employee settings will be mandatory. This is to prevent a sponsor from adding an unsponsored user to the system. When the sponsor saves the new user information, they will be redirected to their own profile page unless they have user administration rights.

7. Enter the desired sponsor name.

8. Click Search. The search will return only users with the Sponsor permission.

9. Click Select for the desired sponsor.

10. Use the date picker to enter the Sponsorship Start Date and Sponsorship End Date.

NOTE: The Sponsorship End Date field controls how long the guest user can book Travel. This is especially useful for Travel & Expense customers who want the user to continue to have access to the system for Expense report submission. Recording a sponsorship end date can also be useful for reporting purposes. Administrators still must use the Account Termination Date field to completely terminate the user's access.
11. In the **Expense and Invoice Settings** section, enter the required fields.

12. Click **Save**. The **User Details** page reloads.

13. In the **Expense and Invoice Settings** section, click **Approvers**. The **Approvers for <user>** window appears.

14. Enter the expense report approver name.

15. Click **Save**, then close the window.

16. (Optional) In the **Expense and Invoice Settings** section, click **Expense Delegates**. The **Expense Delegates for <user>** window appears.

17. (Optional) Click **Add**, then enter the sponsor's name to assign them delegate rights for the sponsored user. Adjust the delegate settings as desired.

18. Click **Save**, then close the window.

19. Click **Save**.

**Modifying a Guest User Sponsorship**

- **To modify a guest user sponsorship:**

  1. In the **Non-Employee Settings** section of the **User Details** page, click the pencil icon for the desired sponsorship.
Section 6: What the Admin Sees

Deleting a Guest User Sponsorship

To delete a guest user sponsorship:

In the Non-Employee Settings section of the User Details page, click the trashcan icon for the desired sponsorship.

Converting a Guest User to an Employee

To convert a guest user to an employee:

In the Non-Employee Settings section of the User Details page, click Make User an Employee.

Using this button clears all of the sponsorship information from the User Details page, but allows the company to retain the sponsorship information for historical reporting purposes.
NOTE: The login ID is a critical component of the user account, as it must be unique. It may be easier to create a separate new account once a user becomes an employee, and mark the guest account as inactive.

Terminating a Guest User Account

The Sponsorship End Date field controls how long the guest user can book Travel. This is especially useful for Travel & Expense customers who want the user to continue to have access to the system for Expense report submission. Recording a sponsorship end date can also be useful for reporting purposes. Administrators still must use the Account Termination Date field to completely terminate the user's access.

To terminate a guest user account:

- On the User Details page for the guest user, enter the current date in the Account Termination Date field.

Section 7: Configuration

Overview

The configuration process for Guest User involves the following steps:

1. Enable the feature.
2. Assign the Sponsor user role.
3. (Optional) Update the Sponsor field access settings.
4. (Optional) Create audit rules based on the Has Sponsorship field.

The company should also consider the rules and processes that should be applied to guest users. If the guest users follow the same policy and workflow as regular users, there is no additional work to be done. If, however, they require a different workflow, different expense types, or different forms and fields – it may be necessary to create a new Expense Group and/or Expense Policy.
Step 1: Enabling the Feature

To enable Guest User:

1. Click Administration > Company (on the sub-menu) > Company Admin.

   **NOTE:** Depending on your permissions, the page may appear immediately after you click Administration.

2. Click Company Settings (left menu).

3. Select the desired values for the guest user settings:

   ![Setting Table]

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Sponsored Users</td>
<td>Select this option to enable the new guest user profile attributes. This is the main on/off setting for this feature.</td>
</tr>
<tr>
<td>Allow sponsored guest users to add credit cards for travel booking</td>
<td>(Travel booking) Select this option to allow the guest user to add their own credit card(s) to the SAP profile.</td>
</tr>
<tr>
<td>Allow sponsor to add new sponsored guest users</td>
<td>Select this option to enable the <strong>Add a Sponsored Guest</strong> link in the sponsor's profile. This allows sponsors to create guest user accounts.</td>
</tr>
<tr>
<td>Allow sponsor to set/edit sponsorship termination date</td>
<td>Select this option to enable the <strong>Terminate Sponsorship</strong> button next to each guest user listed in the <strong>Sponsored Guest Users</strong> section in the sponsor's profile. This allows the sponsor to edit the end date for the sponsorship for the guest user. The user is blocked from booking travel within SAP outside of these date ranges. The user's ability to sign into the system is controlled by the termination date for the user account, as with any user account.</td>
</tr>
</tbody>
</table>

For more information, refer to the *Concur Expense: Group Configurations for Expense Setup Guide* and the *Concur Expense: Policies Setup Guide*.
## Step 2: Assigning the User Role

Once the feature is enabled for a company, the **Sponsor** user permission appears on the **User Permissions** page. This user role is group-aware, and allows the user to create (if configured) and manage sponsored guest accounts. The sponsor may be assigned delegate access for the guest.

![User Permissions](image)

For more information, refer to the *Shared: User Administration User Guide*.

## Step 3: Updating the Sponsor Field Access Settings

When the Sponsored Guest User feature is enabled, the **Sponsor** field must be added to the report header form. This field requires a value if the user is a sponsored guest user, and must be configured as editable by the employee role.
By default, the approver and processor can see the field, but it is read-only. The administrator can choose to give the approver and processor access to modify the **Sponsor** field in **Forms and Fields**.

For more information, refer to the *Concur Expense: Forms and Fields Setup Guide*. 
Step 4: (Optional) Creating Audit Rules

The administrator can create or modify audit rules to use the sponsored guest fields:

- The Report data object has the **Has Sponsorship** field.
- The Employee data object has the **Is Non Employee** field.

For more information, refer to the *Concur Expense: Audit Rules Setup Guide*. 