

Shared: Import/Extract Administrator

User Guide

Last Revised: March 15, 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
March 15, 2024	Added section on User Data Extracts.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
August 29, 2019	Clarified that the Import/Extract Administrator role is available to Concur internal staff only.
April 2, 2019	Changed the term "Concur" to "SAP Concur".
February 12, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 26, 2018	Updated the copyright; no other changes; cover date not updated
December 15, 2016	Changed copyright and cover; no other content changes.
December 9, 2016	A new confirmation message is now displayed with the Run Now function is used.
September 23, 2016	Added a Note that the difference between the Record Count and the Last File Fun Record Count is that the Record Count is based on the Journal Key, while the Last File Run Record Count is based on the total number of line item entries in the extract file.
March 18, 2016	Added a note to the <i>View Extract and Archive Run Information</i> section stating that if the extract run completed with warnings, clicking View (from the Summary column) may display this message: No data found for this extract run. This extract run did not generate a new file but has fixed a previously failed extract, run #. The fixed data will be added to the next extract.
January 25, 2016	Changed references to the import/extract guide; no other changes
May 15, 2015	Updated the <i>Configuration—Upload and Download</i> section.
May 1, 2015	Updated the <i>Obtain the Extract Download</i> section.
April 17, 2015	Changed the name of Concur Insight to Analysis/Intelligence; no other content changes
February 6, 2015	Added information about the HMC setting to allow the upload of company card transactions
January 16, 2015	Added information about the Send to Excel button
December 2, 2014	Added overview information about upload and download
December 1, 2014	Changed from DRAFT to FINAL

Date	Notes/Comments/Changes
November 26, 2014	<p>Initial publication</p> <p>The name of the tool and the associated user role has changed from Integration Administrator to Import/Extract Administrator.</p>

Import/Extract Administrator

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

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

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

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

Section 2: Overview

The Import/Extract Administrator tool is used for integrations between SAP Concur and a client's external systems. Generally, integrations include importing data from an external source (such as employee information from an HR database), consolidating and moving data to a reporting database (for use with Analysis/Intelligence; formerly Concur Insight), or extracting data for import into a client's financial system.

Import/Extract Monitor vs Import/Extract Administrator

There are two similar tools: the Import/Extract Monitor and the Import/Extract Administrator.

The Import/Extract Monitor tool allows a user (generally a client) to:

- View, but not modify, the import/extract/archive run information
- Depending on the client's configuration:
 - ◆ Upload import data
 - ◆ Download extract data



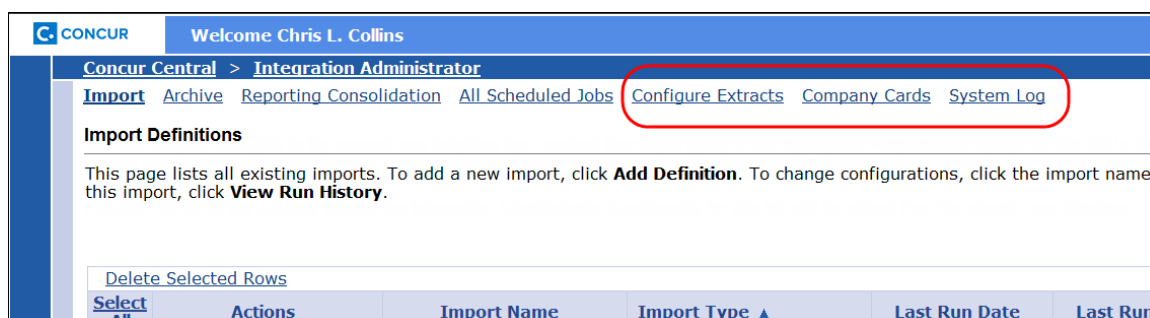
For more information, refer to *Upload and Download Files* in this guide and the *Shared: Import/Extract Monitor User Guide*.

The Import/Extract Administrator tool allows a user to complete all of the tasks of the Import/Extract Monitor as well as create, edit, and delete jobs and schedules.

NOTE: The Import/Extract Administrator tool is available **only** to SAP Concur internal staff for implementation, testing, and ongoing support.

Configure Extracts, Company Card, System Log – Classic UI

Note that the Configure Extracts, Company Cards, and System Log portion of the legacy Integration Administrator tool are still in the **classic** user interface.



Role Required

To access the Import/Extract Administrator tool, the user must be assigned the Import/Extract Administrator role. It is available on the **Expense**, **Request**, or **Invoice** tab in User Permissions.



Refer to the *Shared: User Administration User Guide*.

Section 3: Upload and Download Files

Depending on the client's configuration, the client may be able to *upload* import files from a local machine to SAP Concur as well as *download* extract files from SAP Concur to a local machine. This process may be used instead the FTP process that requires encryption.



Refer to *Configuration – Upload and Download* below.

Getting Started

An SAP Concur Implementation Consultant must first activate required functionality before files can be transmitted. When submitting a request, note that a request must be made **separately** for the Test and Production environments – site setting changes in one environment cannot be migrated to the other environment by the SIMPEX process.

Guidelines – Uploading Import Files

Note the following guidelines when uploading import files:

- The process does **not** require the uploaded file to be encrypted.
- The import file must be in the specified format and layout.



For information about format and layout of import files, refer to the import and extract file specifications.

- The import file should follow a consistent naming convention for archiving purposes.
- One or more files may be included in a ZIP file, but note that:
 - ♦ If more than one file is included, each must be of the same type (List, etc.).
 - ♦ The ZIP file must not be password protected.
- The web-based protocol HTTPS (SSL) is used to transmit the file(s). Because of this, file size should be limited to a maximum of 20 Megabytes (MB).

NOTE: If you are uploading a file (for example, a .csv file) that is 20 MB or more, consider zipping the file. Ensure that the zipped file is 20 MB or less and then upload the zip file.

- If importing double-byte characters (Chinese, Japanese, etc.), the import file must be UTF-8 (Unicode) encoded; otherwise ANSI encoding is sufficient.
- The ability to upload credit card feeds on demand is disabled by default because card feeds are managed by the card vendor and SAP Concur – they are never uploaded by the client. SAP Concur internally allows on-demand upload of card feeds for implementation, testing, and troubleshooting purposes.



Refer to *Configuration – Upload and Download* below.

Guidelines – Downloading Extract Files

Note the following guidelines when downloading extract files:

- If the client uses scheduled Over Night Processing (ONP), the extract file should be downloaded after 5:00 AM the following day.
- Once the file is downloaded, it is no longer available for subsequent downloads – the file can be downloaded only once.
- The process does not encrypt the file the client receives.
- The file is received in the correct format and layout.
- The file is ANSI encoded unless notice is given to SAP Concur to provide the file in UTF-8 (Unicode) format for double-byte character sets.

Estimated Times for Import Upload and Import Job Start

The amount of time and when an import file should be uploaded is dependent on the environment type the file is uploaded to:

- **TEST environment:** On average, the file upload process may take anywhere between 2 - 30 minutes depending on the size of the file being uploaded. The import job is initiated a few minutes after the import file upload is completed.
- **PRODUCTION environment:** On average, the file upload process may take anywhere between 2 - 30 minutes depending on the size of the file being uploaded. The import job is initiated within the client's Over Night Processing (ONP) window as part of the standard production processes starting at 6:00 PM. This means that the file should be uploaded **prior** to 6:00 PM if the import job should be run on the same day the file is uploaded.

Configuration – Upload and Download

Allow Upload and/or Download

▶ *To allow data upload and/or download:*

In the SAP Concur-internal management console, SAP Concur sets the **Allow File Upload** and/or **Allow File Download** options (on the **Settings** page) to Yes. These settings apply globally to all users with the Import/Extract Monitor user role.

Allow On-Demand Card Feed Upload

The ability to upload credit card feeds on demand is disabled by default because card feeds are managed by the card vendor and SAP Concur – they are never uploaded by the client. SAP Concur can, however, allow it for implementation, testing, and troubleshooting purposes.

▶ *To allow card feed upload:*

In the SAP Concur-internal management console, SAP Concur sets the **Allow Manual Card Data Upload** option (on the **Settings** page) to Yes.

Section 4: Access the Import/Extract Administrator

▶ *To access the tool:*

1. Click **Administration > Company > Tools**.

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

2. Click **Import/Extract Administrator** (left menu). The **Import/Extract Administrator** page appears.

The screenshot shows the 'Import/Extract Administrator' application. On the left, a sidebar contains a 'Tools' section with a list of links. 'Import/Extract Administrator' is highlighted with a red box. The main content area has three tabs: 'Scheduled Jobs', 'Imports', and 'User Data Extracts'. The 'Imports' tab is selected, displaying a table with two columns: 'Job Name' and 'Job Type'. The table lists various import jobs, all of which are 'Accounting Extract' type.

Job Name	Job Type
Attendee Extract	Accounting Extract
Concur Invoice Positive Pay Standard Extra...	Accounting Extract
Financial Data	Accounting Extract
Invoice GL Extract	Accounting Extract
Invoice Payment Confirmation v1.1	Accounting Extract
Purchase Order Extract	Accounting Extract
Purchase Order Receipt Extract	Accounting Extract
Standard Request Extract	Accounting Extract
USD Company Paid Synchronized Accounti...	Accounting Extract
USD Synchronized Accounting Extract	Accounting Extract
Approval Time Expire	Approval Time Expire

The page contains two tabs: **Scheduled Jobs** and **Imports**.

Section 5: View and Manage Imports

Use the **Imports** tab to:

- View import run details
- Upload import data (depending on configuration)
- Create a new import definition
- Modify an existing import definition
- Remove an import definition
- Schedule a job



Refer to *Schedule a Job* in this guide.

- Run a job manually



Refer to *Run a Job Manually* in this guide.

View Import Run Details

► To view import run details:

1. On the **Import/Extract Administrator** page, click the **Imports** tab.

Section 5: View and Manage Imports

Scheduled Jobs

Imports

New

Modify

Remove

Upload

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import			View	View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

- In the **Run History** column, click **View** for the desired job.

Scheduled Jobs

Imports

New

Modify

Remove

Upload

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import			View	View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

The **Import Run History** page appears.

Scheduled Jobs

Imports

Import Run History For: Company Card for Training

[← Return to Import Jobs](#)

Find every run where

Run Date

▼

Equals

▼

mm/dd/yyyy

Go!

Run Number	File Name	Run Date	Run Status	Record Count	Summary	Run Details
2		07/10/2014 12:38 PM	Success (No File)	0	View	View
1	CC_SueP_American_dt_01.txt	07/10/2014 12:38 PM	Completed with Warnings	4	View	View

The following information appears on this page.

Column	Description/Action
Run Number	Unique run ID number
File Name	File name of the file that was imported
Run Date	Start date for the run NOTE: The data is sorted by this column, newest first.
Run Status	Status for the run
Record Count	Detail record count for this run
Summary	Click View to see the summary.
Run Details	Click View to see the run details.

- To view the **summary** information, click **View** in the **Summary** column on the **Import Run History** page.

Scheduled Jobs

Imports

Import Run History For: Company Card for Training

[← Return to Import Jobs](#)

Find every run where

Run Date

▼

Equals

▼

mm/dd/yyyy

Go!

Run Number	File Name	Run Date	Run Status	Record Count	Summary	Run Details
2		07/10/2014 12:38 PM	Success (No File)	0	View	View
1	CC_SueP_American_dt_01.txt	07/10/2014 12:38 PM	Completed with Warnings	4	View	View

The **Import Run Summary** page appears.

Import Run Summary For: Company Card for Training Run# 1		×
Run Configuration		
Import Name	Company Card for Training	
Import Definition File Name	CCCI_ConcurStandard.xml	
Import File Format	Bank Implementing Concur Standard Rev. 5	
Import File Name	CC_SueP_American_dt_01.txt	
Application Server	unknown	
Run Executed By	SYSTEM	
Payment Type	IBCP	
Bank Charge Transactions	Available to employees	
Cash Advance Transactions	Available to employees	
Payment Transactions	Not available to employees	
ATM Withdrawals	Imported As Cash Advances	
Value-added Tax	Do not use the card transaction data	
Run Statistics		
Run Number	1	
Start Time	07/10/2014 12:38 PM	
End Time	07/10/2014 12:38 PM	

The information provided on this page varies depending on the type of import. Regardless, the following information appears.

Field	Description/Action
Run Configuration	
Import Name	Name of the import
Import Definition File Name	File name of the file that defines the import
Import File Name	File name of the import file

Field	Description/Action
Application Server	Name of the application server; probably hidden
Run Executed By	Name of the admin who ran the import
Run Statistics	
Run Number	Unique run ID
Start Time	Start date/time for the run
End Time	End date/time for the run
Total Run Time	Duration of the run
Status	Status of the run
Records Count	Count of records included in the detail section of the import file (not including any records with errors)
Error Count	Number of errors logged during this run
Warning Count	Number of records with warnings

When done, click the close button (upper-right corner). The **Import Run History** page appears.

- To view the **run detail** information, click **View** in the **Run Details** column on the **Import Run History** page.

Scheduled Jobs Imports

Import Run History For: Company Card for Training

[← Return to Import Jobs](#)

Find every run where Run Date Equals mm/dd/yyyy

Run Number	File Name	Run Date	Run Status	Record Count	Summary	Run Details
2		07/10/2014 12:38 PM	Success (No File)	0	View	View
1	CC_SueP_American_dt_01.txt	07/10/2014 12:38 PM	Completed with Warnings	4	View	View

The **Import Run Details** page appears.

Import Run Details For: Company Card for Training ✕
Run# 1

Find every log entry where
Level
Any
Go!

Level	Record Identifier	Message
Warning	2	A new Merchant Code, 0000 , was added to the database. Use the Merchant Code Mapping page in Expense Company Card Administrator to map the merchant code to the appropriate expense type based on your corporate policy.

K < | Page 1 of 1 | > > |
Send to Excel
Displaying 1 - 1 of 1

Column	Description/Action
Level	Info, Error, or Warning
Record Identifier	Record associated with the error
Message	Text message created for the error

NOTE: There are no details if the import was successful.

If the list is lengthy and if you want to review the information in Excel, click **Send to Excel**.

When done, click the close button (upper-right corner). The **Import Run History** page appears.

- Click the **Return to Import Jobs** link. The **Imports** tab appears.

Upload Import Data

Upload

▶ To upload import data:

- On the **Imports** tab, click the desired import, such as Travel Allowance Import.

Scheduled Jobs

Imports

New

Modify

Remove

Upload

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import				View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

The **Upload** button becomes available.

NOTE: If the **Upload** button is not available for card feeds, refer to *Configuration – Upload and Download* in this guide.

- Click **Upload**. The **Upload File** window appears.

Upload File for: Travel Allowance Import

Click **Browse** to locate the file (with extension txt or zip) to be uploaded.

[Browse...](#)

[Upload](#)
[Cancel](#)

- Locate the desired file.
- Click **Upload**. If the file successfully uploads, a confirmation message appears.
- Close the confirmation message and verify the status and run history, as described on the previous pages.

View Upload History

► To view upload history:

- On the **Imports** tab, click **View** in the **Upload History** column.

Scheduled Jobs

Imports

New

Modify

Remove

Upload

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import				View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

The **File Upload History** page appears.

Scheduled Jobs		Imports					
File Upload History For: Travel Allowance Import							
← Return to Import Jobs							
Find every run where		File Name	▼	Equals	▼	*	Go!
Start Date	File Name	Run Status	Initiating User	Message			
11/19/2014 05:22 PM	20120710172600_1923_perdiem_20...	Success	Collins,Chris				

The following information appears.

Column	Description/Action
Start Date	Start date for the run
File Name	File name of the file that was imported
Run Status	Status for the run
Initiating User	Admin who initiated the job
Message	Text message created for the error, if any

- Click the **Return to Import Jobs** link. The **Imports** tab appears.

Create a New Import Definition

Create an Import Definition

► To create a new import definition:

- On the **Imports** tab, click **New**.

Section 5: View and Manage Imports

Scheduled Jobs

Imports

New

Modify

Remove

Upload



Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import			View	View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

This page appears.

Scheduled Jobs		Imports	
Save Cancel			
Enter the properties for this import definition. The import process will open any file located in the data directory, read and process its contents, and then move that file to the archive directory.			
Job Code:	<input type="text" value="Select One"/>		
Name:	<input type="text"/>		
		Relative Path Reference	
Data Directory:	<input type="text"/>	UseDefault	
Actual Data Directory:		Resolve	
Archive Directory:	<input type="text"/>	UseDefault	
Actual Archive Directory:		Resolve	
Import Definition File:	<input type="text"/>		
Email Notification on Success:	<input type="checkbox"/>		

2. Complete the appropriate fields.

Field	Description/Action
Job Code	Select the file type to import. The page refreshes and fields associated with the import type appear.
Name	Enter a unique name for this import.
Data Directory	<p>The system creates the name of the data directory using a relative path for where the data files, such as XML files, customizations, and so on, are stored. The actual path is displayed in the Actual Data Directory field.</p> <p>Best Practice: Always use the default path name on new jobs.</p>

Field	Description/Action
	<p>Relative Paths</p> <p>If you use relative path values, you must use this format:</p> <ul style="list-style-type: none"> ♦ <name of replacement value>\<name of 2nd replacement value> and so on ♦ You can use combinations of replacement values and hard values together: <name of replacement value>\importname <p>If you change the relative path, you must click the Resolve link beside the Actual Data Directory field in order to see the change in that field while you are editing; otherwise, you will see the change after the page is saved.</p> <p>You can look up a list of the values by clicking the Relative Path Reference link.</p> <p> For more information on relative paths and the Relative Path Reference link, refer to the <i>Relative Paths</i> section at the end of this procedure.</p> <p>Click the Use Default link to revert to the default root path from the CTH_RELATIVE_PATHS table.</p>
Actual Data Directory	<p>The converted value (the actual path) of the data directory.</p> <p>Click the Resolve link to take the value from the data directory path and convert it into the absolute value. The system will resolve the path every time the job is run. You do not have to click the Resolve link before saving a job definition, but it is a good practice to do so – to double-check the actual path.</p> <p>NOTE: After the job is saved, the actual path will always appear on the job definition screen while editing.</p>
Archive Directory	<p>When you exit the Data Directory field, the name of the archive directory appears automatically.</p> <p>NOTE: If this directory does not already exist, the system will create it.</p> <p>Best Practice: Do <i>not</i> change the name.</p> <p>Relative Paths</p> <p>If you use relative path values, you must use this format:</p> <ul style="list-style-type: none"> ♦ <name of replacement value>\<name of 2nd replacement value> and so on ♦ You can use combinations of replacement values and hard values together: <name of replacement value>\importname <p>If you change the relative path, you must click the Resolve link beside the Actual Archive Directory field in order to see the change in that field while you are editing; otherwise, you will see the change after the page is saved.</p> <p>You can look up a list of the values by clicking the Relative Path Reference link.</p> <p> For more information on relative paths and the Relative Path Reference link, refer to the <i>Relative Paths</i> section at the end of this procedure.</p> <p>Click the Use Default link to revert to the default root path from the CTH_RELATIVE_PATHS table.</p>

Field	Description/Action
Actual Archive Directory	<p>The converted value (the actual path) of the archive directory.</p> <p>Click the Resolve link to take the value from the data directory path and convert it into the absolute value. The system will resolve the path every time the job is run. You do not have to click the Resolve link before saving a job definition, but it is a good practice to do so – to double-check the actual path.</p> <p>NOTE: After the job is saved, the actual path will always appear on the job definition screen while editing.</p>
Import Definition File	<p>Select the import definition file you will use (depending on the import, there may be several).</p> <p>NOTE: If the administrator created and then edited a copy of this file, then select the copy.</p>
<fields for specific import types>	<p>Additional field may appear based on the selected import type (job code).</p>
	<p>For attendee, employee, and list imports:</p> <ul style="list-style-type: none"> • Delimiter: Choose the delimiter that will act as the separating character between data values in the record row: <ul style="list-style-type: none"> ♦ Comma ♦ Pipe ♦ Tab (not available for List import)
	<p>For credit card feeds:</p> <ul style="list-style-type: none"> • Card Type: Select the card type from the list. <p>NOTE: Selected cards allow either view-only access or hide this list completely (for example card member list feed types or American Express).</p> • Payment Type Key: Select from the list. • Card Icon To Display: Select the desired icon. • File Prefixes: Enter as appropriate. • Allow use of value-added tax from the card transition: Select as appropriate. • Import billing address information when available: Select as appropriate.
	<p>For invoice import:</p> <ul style="list-style-type: none"> • Default Policy: Select as appropriate. • Default Currency: Select as appropriate. • Default Ledger: Select as appropriate. • Data Source: Select as appropriate.

Field	Description/Action
Email Notification on Success	<p>If you select this check box, the system sends an email to each user assigned the role of Import/Extract Administrator if the run:</p> <ul style="list-style-type: none"> ♦ Completes successfully ♦ Fails or ♦ Completes with errors <p>If you clear this check box, the system sends an email to each user assigned the role of Import/Extract Administrator if the run:</p> <ul style="list-style-type: none"> ♦ Fails or ♦ Completes with errors

3. Click **Save**.

Unable to Resolve

The following warning message appears if the system cannot resolve the actual path:

Warning

```
Parameter 'DEFAULT_JOB_DAT' was not found in
CTH_PATH_REPLACEMENT_VALUES. Parameters:
@pathName='<DEFAULT_JOB_DAT>\Customer1Amex';
@EntityCode='p0000010enÿp'; @jobCode='CARD_FEED'; @fullyResolve='0';
@webContext='NULL'
```

NOTE: Pay close attention to the first parameter in single quotes. This indicates which part of the path does not exactly match a relative path replacement value. In this example, the DEFAULT_JOB_DAT should be DEFAULT_JOB_DATA.

Relative Path Reference

Within the Import/Extract Administrator (and any place in the system that requires a file location and path name), the path is saved as a relative path rather than an absolute path or direct path, such as c:\data. The system dynamically determines where to look based on where the entity is running the application. A relative path dynamically determines the path name using replacement values.

For each entity, the system knows – from the entity definition – the root path for the batch server and the root path for the entity. The relative paths also need to know specifics for the job they are running, such as folder in which the data files reside. Relative paths use standard file paths to know beyond the root paths, where to look for each type of job.

The replacement values are specific names used within the file location field. To obtain a list of those values, click the **Relative Path Reference** link on every job definition page.

Relative Path Reference	
The following table shows the different relative path parameters that can be used in a path name.	
Parameter Name	Description
ANALYSIS_ARCHIVE	Looks up value from CTH_ANALYSIS_SERVER.ARCHIVE_SUBDIR_NAME
ANALYSIS_ARCHIVE_ROOT	Default prefix for Analysis Extract archive files.
ANALYSIS_DATA	Looks up value from CTH_ANALYSIS_SERVER.DATA_SUBDIR_NAME
ANALYSIS_DATA_ROOT	Default prefix for Analysis Extract data files.
BATCH_ROOT	Looks up value from CTH_ENTITY_SETTING(BatchRootPath)
COMMON_BATCH_ROOT	This is the beginning of the batch root up to, but not including the entity directory (i.e. \\10.200.3.400\batch)
COMMON_ENTITY_ROOT	This is the beginning of the entity root up to, but not including the entity directory (i.e. \\10.200.3.400\batch)
CREDIT_CARD_XML_ROOT	Path for central storage of credit card XML files
CUSTOMIZATION_ROOT	Looks up value from CTH_ENTITY_SETTING(CustomizationRootPath)
DATADUMP_DELIVERY_PATH	Root path to drop Data Dump Extract zip files.
<div> K < Page 1 of 4 > X ↺ </div>	

FORMAT OF THE RELATIVE PATH VALUES

The format of the path fields should follow this format:

```
<name of replacement value>\<name of 2nd replacement value>
```

You can use combinations of replacement values and hard values together:

```
<name of replacement value>\extractname
```

Modify an Existing Import Definition

► To modify a definition:

- On the **Imports** tab, either:
 - Click the desired import and then click **Modify**.
 - or –
 - Double-click the desired import.

Scheduled Jobs Imports							
<div> New Modify Remove Upload </div>							
Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import				View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

This page appears.

Scheduled Jobs Imports

Save Cancel

Enter the properties for this import definition. The import process will open any file located in the data directory, read and process its contents, and then move that file to the archive directory.

Job Code: Travel Allowance Import

Name: Travel Allowance Import

Data Directory: <DEFAULT_JOB_DATA> [UseDefault](#)

Actual Data Directory: \\rqa3-sql02\sqlpath\batchroot\path\p0195717zmbc\import\perdiem [Resolve](#)

Archive Directory: <DEFAULT_JOB_ARCHIVE> [UseDefault](#)

Actual Archive Directory: \\rqa3-sql02\sqlpath\batchroot\path\p0195717zmbc\import\perdiem\archive [Resolve](#)

Import Definition File: concur-standard_v3.xml

2. Make the desired changes, based on the field definitions in *Create an Import Definition*.
3. Click **Save**.

Remove an Import Definition

► To remove a definition:

1. On the **Imports** tab, click the desired import, such as Travel Allowance Import. The **Remove** button becomes available.

Scheduled Jobs Imports

New Modify Remove Upload

Import Name	Import Type	Last Run Date	Last Run Status	Run History	Upload History	Schedule	Run Now
Company Card for Training	Credit Card Feed	07/10/2014 12:38 PM	Success (No File)	View	View	Schedule	Run Now
Employee Import	Employee Import				View	Schedule	Run Now
Exchange Rate	Exchange Rates				View	Schedule	Run Now
Invoice Pay Feedback Import	Invoice Pay Feedback Import	02/26/2014 03:00 AM	Success (No File)	View	View	Schedule	Run Now
List Import	List Import	11/19/2014 09:46 PM	Success (No File)	View	View	Schedule	Run Now
LOCATION	Location	09/04/2014 03:21 PM	Completed with Errors	View	View	Schedule	Run Now
Travel Allowance Import	Travel Allowance Import	11/21/2014 02:08 PM	Completed with Errors	View	View	Schedule	Run Now

2. Click **Remove**.

Section 6: View and Manage Extracts and Archives

View Extract and Archive Run Information

Use the **Scheduled Jobs** tab to view import, extract, and archive job run information.

NOTE: For imports, you can also use the **Imports** tab.

► **To view run history:**

1. On the **Import/Extract Administrator** page, click the **Scheduled Jobs** tab (if it is not already selected).

Scheduled Jobs Imports						
Job Name	Job Type	Last Run Date	Last Run Status	Run History	Schedule	Run Now
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract				Schedule	Run Now
AP/GL Extract V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
Paid To Employee V.2.1	Accounting Extract				Schedule	Run Now
Purchase Order Extract	Accounting Extract				Schedule	Run Now

2. In the **Run History** column, click **View** for the desired job, for example, the AP/GL Extract V.2.1.

Scheduled Jobs Imports						
Job Name	Job Type	Last Run Date	Last Run Status	Run History	Schedule	Run Now
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract				Schedule	Run Now
AP/GL Extract V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
Paid To Employee V.2.1	Accounting Extract				Schedule	Run Now
Purchase Order Extract	Accounting Extract				Schedule	Run Now
Standard Direct Reimbursement Client Pay Ex...	Accounting Extract				Schedule	Run Now

The **Extract Run History** page appears.

Scheduled Jobs

Imports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where

Run Date

▼

Equals

▼

mm/dd/yyyy

Go!

	Run Number	File Name	Run Date	Run Status	Record Count	Summary
+	2		10/07/2014 04:07 PM	Success	30	View
+	1		04/04/2014 10:44 AM	Success	2	View

The following information appears on this page.

Column	Description/Action
Run Number	Unique run ID number
File Name	(This field is blank for extracts and archives.)
Run Date	Start date for the run NOTE: The data is sorted by this column, newest first.
Run Status	Status for the run
Record Count	Detail record count for this run
Summary	Click View to see the summary.

3. To view the **summary** information, click **View** in the **Summary** column.

Scheduled JobsImports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where

Run Date

▼

Equals

▼

mm/dd/yyyy

Go!

	Run Number	File Name	Run Date	Run Status	Record Count	Summary
+	2		10/07/2014 04:07 PM	Success	30	View
+	1		04/04/2014 10:44 AM	Success	2	View

The **Extract Run Summary** window appears.

Extract Run Summary For:AP/GL Extract V.2.1 Run# 2

Run Configuration

Extract Name

AP/GL Extract V.2.1

Extract File Name

Application Server

unknown

Run Executed By

SYSTEM

Run Statistics

Run Number

2

Start Time

10/07/2014 04:07 PM

End Time

10/07/2014 04:07 PM

Total Run Time

00:00:01

Status

Success

Records Count

30

Error Count

0

Warning Count


0

The following information appears on this page.

Field	Description/Action
Run Configuration	
Extract Name	Name of the extract
Extract File Name	(blank)
Application Server	Name of the application server; probably hidden
Run Executed By	Name of the admin who ran the import
Run Statistics	
Run Number	Unique run ID
Start Time	Start date/time for the run
End Time	End date/time for the run
Total Run Time	Duration of the run
Status	Status of the run
Records Count	Count of records included in the detail section of the extract file (not including any records with errors)
Error Count	Number of errors logged during this run
Warning Count	Number of records with warnings

NOTE: If the extract run completed with warnings, clicking View (from the Summary column) may display this message: No data found for this extract run. This extract run did not generate a new file but has fixed a previously failed extract, run #. The fixed data will be added to the next extract.

When done, click the close button (upper-right corner). The **Extract Run History** page appears.

- To view the output file **detail** information, click the expand  button on the left side of the desired run. The row expands, displaying the output files.

Scheduled Jobs

Imports

Extract Run History For: AP/GL Extract V.2.1

Return to Scheduled Jobs

Find every run where

Run Date

Equals

mm/dd/yyyy

Go

Run Number	File Name	Run Date	Run Status	Record Count	Summary
2		10/07/2014 04:07 PM	Success	30	View

+

Extract File Details: Run# 2

Output File	Last File Run Date	Last File Run Record Co...	Last File Run Status	View Details	Run Now
Attendee Detail	10/07/2014 04:07 PM	0	Success	View	Rerun Now
AP/GL CES Standard Extract v.2	10/07/2014 04:07 PM	30	Success	View	Rerun Now

1		04/04/2014 10:44 AM	Success	2	View
---	--	---------------------	---------	---	----------------------

NOTE: The difference between the **Record Count** and the **Last File Run Record Count** is that the **Record Count** is based on the Journal Key, while the **Last File Run Record Count** is based on the total number of line item entries in the extract file.

Click **View** in the **View Details** column of the desired output file.

Scheduled JobsImports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where

Run Date

Equals

mm/dd/yyyy

Go!

Run Number	File Name	Run Date	Run Status	Record Count	Summary
2		10/07/2014 04:07 PM	Success	30	View

Extract File Details: Run# 2

Output File	Last File Run Date	Last File Run Record Co...	Last File Run Status	View Details	Run Now
Attendee Detail	10/07/2014 04:07 PM	0	Success	View	Rerun Now
AP/GL CES Standard Extract v.2	10/07/2014 04:07 PM	30	Success	View	Rerun Now

+

1

04/04/2014 10:44 AM

Success

2

[View](#)

The **Extract Run History** tab appears.

Scheduled JobsImportsExtract Run History

Extract Run History For: AP/GL Extract V.2.1

[← Return to Extract Run History](#)

Output File: AP/GL CES Standard Extract v.2

Find every run where

Run Date

Equals

mm/dd/yyyy

Go!

Run Number	File Name	Run Date	Run Status	Record Count	Summary	Run Details	Download File
1	\\vqa3-sql02\vrqapath\batchroot\path\p0195717z...	10/07/2014 04:07 PM	Success	30	View	View	Download

Either:

- ◆ To view the **summary** information, click **View** in the **Summary** column.

Extract Run Summary For:AP/GL CES Standard Extract v.2 Run# 1

✕

Run Configuration

Extract Name	AP/GL CES Standard Extract v.2
Extract File Name	
Application Server	unknown
Run Executed By	SYSTEM

Run Statistics

Run Number	1
Start Time	10/07/2014 04:07 PM
End Time	10/07/2014 04:07 PM
Total Run Time	00:00:06
Status	Success
Records Count	30
Error Count	0
Warning Count	0

- ♦ To view the **run detail** information, click **View** in the **Details** column.

Extract Run Details For: AP/GL Extract V.2.1 Run# 1

Find every log entry where

Level

Any

Go!

Level	Record Identifier	Message
Info		The extract file, extract_CES_SAE_v2_p0195717zmbc_20141007160727.txt has been successfully created.

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of 1

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[Send to Excel](#)

Displaying 1 - 1 of 1

If the list is lengthy and if you want to review the information in Excel, click **Send to Excel**.

5. Click **Return to Extract Run History**.
6. Click **Return to Scheduled Jobs**.

Obtain the Extract Download

► **To access the extract download:**

1. On the **Import/Extract Administrator** page, click the **Scheduled Jobs** tab (if it is not already selected).

Scheduled Jobs Imports				
Job Name	Job Type	Last Run Date	Last Run Status	Run History
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract			
AP/GL Extract V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View
Paid To Employee V.2.1	Accounting Extract			
Purchase Order Extract	Accounting Extract			

2. In the **Run History** column, click **View** for the desired job, for example, an extract job.

Scheduled Jobs Imports				
Job Name	Job Type	Last Run Date	Last Run Status	Run History
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract			
AP/GL Extract V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View
Paid To Employee V.2.1	Accounting Extract			
Purchase Order Extract	Accounting Extract			

The **Extract Run History** page appears.

Scheduled Jobs

Imports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where

Run Date

▼


Equals

▼

mm/dd/yyyy

Go!

	Run Number	File Name	Run Date	Run Status	Record Count	Summary
+	2		10/07/2014 04:07 PM	Success	30	View
+	1		04/04/2014 10:44 AM	Success	2	View

- Click the expand  button on the left side of the desired run. The row expands, displaying the output files.

Scheduled Jobs Imports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where Run Date Equals mm/dd/yyyy

Run Number	File Name	Run Date	Run Status	Record Count	Summary
2		10/07/2014 04:07 PM	Success	30	View

Extract File Details: Run# 2

Output File	Last File Run Date	Last File Run Record Co...	Last File Run Status	View Details
Attendee Detail	10/07/2014 04:07 PM	0	Success	View
AP/GL CES Standard Extract v.2	10/07/2014 04:07 PM	30	Success	View

1		04/04/2014 10:44 AM	Success	2	View
---	--	---------------------	---------	---	----------------------

NOTE: The difference between the **Record Count** and the **Last File Run Record Count** is that the **Record Count** is based on the Journal Key, while the **Last File Run Record Count** is based on the total number of line item entries in the extract file.

Click **View** in the **View Details** column of the desired output file.

Scheduled Jobs Imports

Extract Run History For: AP/GL Extract V.2.1

[← Return to Scheduled Jobs](#)

Find every run where Run Date Equals mm/dd/yyyy

Run Number	File Name	Run Date	Run Status	Record Count	Summary
2		10/07/2014 04:07 PM	Success	30	View

Extract File Details: Run# 2

Output File	Last File Run Date	Last File Run Record Co...	Last File Run Status	View Details
Attendee Detail	10/07/2014 04:07 PM	0	Success	View
AP/GL CES Standard Extract v.2	10/07/2014 04:07 PM	30	Success	View

1		04/04/2014 10:44 AM	Success	2	View
---	--	---------------------	---------	---	----------------------

The **Extract Run History** tab appears.

Scheduled Jobs Imports **Extract Run History**

Extract Run History For: AP/GL Extract V.2.1

[← Return to Extract Run History](#) Output File: AP/GL CES Standard Extract v.2

Find every run where Run Date Equals mm/dd/yyyy

Run Number	File Name	Run Date	Run Status	Record Count	Summary	Run Details	Download File
1	\\rqa3-sql02\rgapath\batchrootpath\p0195717z...	10/07/2014 04:07 PM	Success	30	View	View	Download

- On the **Extract Run History** tab, click **Download** in the **Download File** column.

5. Depending on your browser, you will see the option to open, save, etc. Complete the task as appropriate.
6. Click **Return to Extract Run History**.
7. Click **Return to Scheduled Jobs**.

Section 7: Download Extracted User Data

The user data extract feature enables a company administrator with either the Import/Extract Administrator or Import/Extract Monitor role to download extracted user data.

NOTE: User data will not appear on the **User Data Extracts** page until a client Authorized Support Contact (ASC) has requested the data and the request has been processed by SAP Concur internal staff. This data is typically requested with relation to GDPR requirements. This feature is not intended for general use.

► **To access the User Data Extracts page and download available user data:**

1. Under **Administration** click **Tools** and then click **Import/Extract Administrator**.
2. On the **Import/Extract Administrator** page, click the **User Data Extracts** tab.

3. In the **Download File** column, in the row for the data you want to download, click **Download**.

Imports				
User Data Extracts				
Employee ID	SalesForce Case	Request Date	File Name	Download File
800021493000...	123456789012345	02/07/2024 10:01 PM	Extract_user_data_8000214930000294285_123456789012345_1707361277230...	Download
800021493000...	002	02/07/2024 11:11 AM	Extract_user_data_8000214930000294285_002_1707322286249.xlsx.pgp	Download
800021493000...	123456789012345	02/05/2024 08:23 AM	Extract_user_data_8000214930000294285_123456789012345_1707139427126...	Download

NOTE: After downloading the extracted user data, the client is responsible for appropriate handling of the user's data and delivery of the data to the user.

Section 8: Schedule a Job

The **Schedule** link is available on the **All Scheduled Jobs** tab and the **Imports** tab.

► To schedule a job:

1. On the **All Scheduled Jobs** tab or the **Imports** tab, click **Schedule** in the **Schedule** column for the desired job.

Scheduled Jobs		Imports				
Job Name	Job Type	Last Run Date	Last Run Status	Run History	Schedule	Run Now
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract				Schedule	Run Now
AP/GL Extract V.2.1	Accounting Extract	11/26/2014 01:34 PM	Success	View	Schedule	Run Now
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now

The **Scheduled Job** page appears.

Scheduled Job for Job Chain: AMEX Remittance v.2 - US

New
Modify
Remove
Activate
Deactivate

Job Name	Active	Next Run

2. Click **New**. The **Add Scheduled Job** page appears.

Add Scheduled Job for Job Chain: AMEX Remittance ✕

v.2 - US

Enter the properties for this scheduled job. The time is expressed in the server local time.

Name:

Time

For Time, enter a value for either: ☒ Minutes after the Hour ☐ Every n Minutes

Minutes after the Hour (0-59):

Hour:

Day

3. Complete all applicable fields.

Field	Description/Action
Name	Type a unique name of scheduled job.
For Time, enter a value for either	Select one of these: <ul style="list-style-type: none"> Minutes after the Hour Every n Minutes
Minutes after the Hour (0-59)	One of these fields appears depending on the option you selected above.
Every n Minutes (1-59)	Enter the desired number of minutes.
Hour	Select the hour in which this job should be run.

Day

For Day, select from either: ☒ Day of Month ☐ Day of Week

Day of Month:

Month

Field	Description/Action
For Day, select from either	Select one of these: <ul style="list-style-type: none"> Day of Month Day of Week
Day of Month	One of these fields appears depending on the option you selected above.
Day of Week	Select the desired day of month/week.

Month

Month: Every Month

Run Once: ☐

Active: No

Save

Cancel

Field	Description/Action
Month	Select the month that this job is run.
Run Once	<p>If you select (enable) this check box, the job will run only once.</p> <p>If you set up the schedule to run every 15 minutes for a day then the job will run every 15 minutes of that entire day, so technically it will run more than once, it just won't run again on that day next year.</p>
Active	Select Yes or No.

- Click **Save**.

Section 9: Run a Job Manually

! IMPORTANT: Be careful when running a job on demand. The size of the job may cause performance issues.

The **Run Now** link is available on the **All Scheduled Jobs** tab and the **Imports** tab.

► To run a job manually:

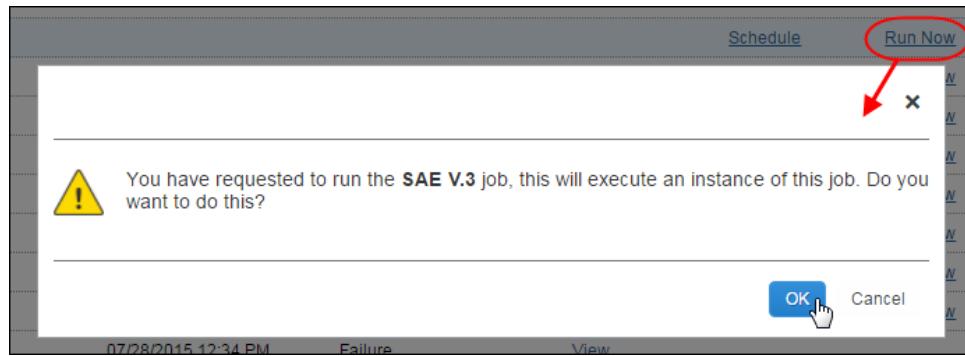
- On the **All Scheduled Jobs** tab or the **Imports** tab, click **Run Now** in the **Run Now** column for the desired job.

Scheduled Jobs

Imports

Job Name	Job Type	Last Run Date	Last Run Status	Run History	Schedule	Run Now
AMEX Remittance v.2 - US	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now
AP/GL 256 Extract Tax On One Line v.1.1	Accounting Extract				Schedule	Run Now
AP/GL Extract V.2.1	Accounting Extract	11/26/2014 01:34 PM	Success	View	Schedule	Run Now
Paid to Credit Card V.2.1	Accounting Extract	10/07/2014 04:07 PM	Success	View	Schedule	Run Now

- Click **OK** in the confirmation message to queue the job for processing.



A status of *Running* appears in the **Last Run Status** column. When done, the result status appears (*Success, Failed, etc.*). Review the run details as described previously in this guide.

