

Shared: SAP Task Center Integration with Concur Solutions

Setup Guide for Professional Edition

Last Revised: June 1, 2023

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
June 1, 2023	Updated section: <ul style="list-style-type: none"> • 3.3 Prerequisites
February 18, 2023	Updated section: <ul style="list-style-type: none"> • 2.1 Features
January 25, 2023	Updated the Prerequisites section to add the specific Identity v4 API scopes required.
November 14, 2022	Updated section: <ul style="list-style-type: none"> • 3.5 SAP Concur Company Request Token
September 27, 2022	Updated sections: <ul style="list-style-type: none"> • 3.2 User Replication Scenarios • 3.3.1 SAP Concur
August 12, 2022	Added sections: <ul style="list-style-type: none"> • 2.3.4 SAP Concur User Import and Provisioning Documentation • 3.2 User Replication Scenarios Updated sections: <ul style="list-style-type: none"> • 2.1.1 Exclusions • 3.3.1 SAP Concur
June 3, 2022	Added sections: <ul style="list-style-type: none"> • 2.1.1 Exclusions • 2.3.3 SAP Concur Single Sign-On and Identity Provider Target Guides Updated sections: <ul style="list-style-type: none"> • 3.2 Prerequisites • 3.4 SAP Concur Company Request Token
April 13, 2022	Updated section: <ul style="list-style-type: none"> • 2.2 Available SAP Task Center Documentation
February 1, 2022	Added information that a DPA must be signed as a pre-requisite.
January 12, 2022	Updated the copyright year; no other changes; cover date not updated
December 2, 2021	Updated section: <ul style="list-style-type: none"> • 2 Overview: Remove Note concerning Task Center availability
September 20, 2021	Updated sections: <ul style="list-style-type: none"> • 3.3.1 Concur Expense: Update Expense Workflow Configuration • 3.3.2 Concur Request: Update Request Workflow Configuration

Date	Notes/Comments/Changes
September 10, 2021	Updated section: <ul style="list-style-type: none"> • 3.2.1 SAP Concur Added section: <ul style="list-style-type: none"> • 3.4 SAP Concur Company Request Token
June 1, 2021	Updated link to SAP Task Center documentation.
April 1, 2021	Removed reference to the mobile app.
March 31, 2021	Updated the copyright year; no other changes; cover date not updated
November 14, 2020	New document.

SAP Task Center Integration with Concur Solutions

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 Concur internal staff. In this case, the client must initiate a service request with SAP Concur Client Support.

2 Overview

SAP Task Center helps reduce administrative burden, improve operational processes and provide better insight within the approval processes and the completion of tasks for customers with several solutions within the SAP portfolio through a centralized solution delivered to users via web.

The SAP Task Center integration with SAP Concur solutions allows clients to include their expense report and request approvals in the Task Center.

The integration supports the following SAP Concur solutions:

- Concur Expense, Professional/Premium Edition
- Concur Request, Professional/Premium Edition

2.1 Features

The integration allows clients to:

- View expense reports pending approval
- Approve expense reports
- Send back expense reports
- View requests pending approval
- Approve requests
- Send back requests

The integration supports approvers with the following user roles:

- Expense Approver
- Request Approver

- Authorized Approver
- Cost Object Approver
- Budget Approver

2.1.1 Exclusions

The SAP Task Center Integration with Concur Solutions does not support the following Concur Expense and/or Concur Request functionality:

- Delegate approval
- Processor approval
- Cash Advance approval
- Partial approvals (modifying the approved amount)
- Deep link from the SAP Task Center to the SAP Concur mobile app view of the report/request
- Viewing the budget associated with the report/request
- Viewing the Google Maps information for Mileage expenses
- Viewing reports/requests that are in the Approved workflow status
- Selecting the next approver for the report/request (Approve & Forward)

In addition, the Concur Expense/Concur Request tasks in the Task Center may not support the same languages as the Task Center. If a user is using an unsupported language the task will appear in the default US English (en-us).

2.2 Available SAP Task Center Documentation

This guide focuses on the tasks required to configure the SAP Task Center integration in the Concur Expense and Concur Request systems. Refer to the [SAP Task Center documentation](#) for further information about SAP Task Center configuration.

2.3 Available SAP Concur Documentation

Full details about the configuration pages are available in the SAP Concur Setup Guides. The relevant guide is referenced in each configuration step.

2.3.1 Concur Expense Professional Edition Setup and User Guides

http://www.concurtraining.com/customers/tech_pubs/ Docs_ExpHelp.htm

2.3.2 Concur Request Professional Edition Setup and User Guides

https://www.concurtraining.com/customers/tech_pubs/ Docs_ReqHelp.htm

2.3.3 SAP Concur Single Sign-On and Identity Provider Target Guides

[Shared: Single Sign-On Overview](#)

[Shared: Single Sign-On Setup Guide](#)

[Shared: Configure an SAP Concur Entity as an IdP Target](#)

2.3.4 SAP Concur User Import and Provisioning Documentation

[User Provisioning Service v4 API](#)

[Identity v4 API](#)

[Shared: Employee Import Specification](#)

[Shared: User Administration](#)

3 Configuration

3.1 Overview

The SAP Task Center requires configuration steps in both Concur Expense and/or Concur Request and the SAP Task Center. This guide contains information about the configuration and activation steps for the integration in Concur Expense and/or Concur Request.



For information about the configuration in SAP Task Center, refer to the *2.2 Available SAP Task Center Documentation* section of this guide.

3.2 User Replication Scenarios

The SAP Task Center Integration with Concur Solutions supports multiple configurations of user replication, based on the customer's existing landscape and identity provider. The central piece of user information is the unique **userUUID**, which must be consistent across all SAP applications that supply the Task Center, including SAP Concur solutions.

Customers must choose whether they will use SAP Cloud Identity Services as their identity provider, or a third-party identity provider. The SAP Task Center Integration with Concur Solutions can support either configuration, as detailed below. With all replication models the SAP Task Center Integration with Concur Solutions refers to the SAP Identity Authentication Service (IAS) for the userUUID of every user.

NOTE: SAP Cloud Identity Services is the best practice method for user replication across the customer's SAP landscape.

NOTE: If a customer does not already use IAS/IPS, we recommend that they test user replication using a Production Sandbox Environment (PSE) test entity before their migration to IAS/IPS.

3.2.1 Using SAP Cloud Identity Services

Customers who will or have already implemented SAP Cloud Identity Services rely on the Identity Provisioning Service (IPS) and Identity Authentication Service (IAS) to create, maintain, and propagate the user data (including userUUID) for each user. To accept this user data, the SAP Concur entity must have SSO configured with SAP IAS and must have configured the SAP Concur entity as an IdP target for SAP IPS.



For more information, refer to the *2.3.3 SAP Concur Single Sign-On and Identity Provider Target Guides* section of this guide.

3.2.2 Using Third-Party Identity Provider

Customers can continue to use their third-party identity provider (IdP) with SAP Task Center, using SAP IAS as a proxy. The customer is responsible for replicating users to SAP IAS. The customer may create the userUUID, or have SAP IAS create it for them.



For more information, refer to:
https://help.sap.com/docs/SAP_CLOUD_IDENTITY/b95c3d5bab324a3a8409eee5267a5b75/a04611df60404a248a7a8089c85b9761.html

After this step, there are two possible methods to replicate the user information into the SAP Concur solutions. The customer is responsible for making sure the userUUID matches in all the SAP applications in their landscape.

Direct: The customer sends the userUUID (and other user data) directly to the SAP Concur solution, using one of the following user import methods:

- Identity v4 API
- UPS v4 API
- Flat file import (employee import record 315)



For more information, refer to the documentation in the *2.3.4 SAP Concur User Import and Provisioning Documentation* section of this guide.

Indirect: The customer can create a new user with IAS, either sending the userUUID or having IAS generate it. IPS then fetches the user data (including userUUID) from IAS as a source system and sends the user data to the SAP Concur solutions as a target system. The customer can additionally provide more user details directly into the SAP Concur solutions, using one of the following user import methods:

- Identity v4 API
- UPS v4 API
- Flat file import



For more information, refer to the documentation in the *2.3.4 SAP Concur User Import and Provisioning Documentation* section of this guide.

3.3 Prerequisites

3.3.1 SAP Concur

- The client must have signed a Data Protection Agreement (DPA).
- The client must be a new or existing SAP Concur client, with Concur Expense Professional/Premium Edition and/or Concur Request Professional/Premium Edition.
- The client must be a new or existing SAP client, with the following SAP system:
 - ◆ SAP Cloud Identity Service, with an SAP IAS and an SAP IPS tenant.
- The SAP Concur administrator who will be setting up the integration must have the following permissions:
 - ◆ *Expense Configuration Administrator* or *Client Expense Administrator* user roles, to grant rights to view and modify Expense workflows
 - ◆ *Request Configuration Administrator*, to grant rights to view and modify Request workflows
 - ◆ *Web Services Administrator* user role, to grant rights to generate a company request token and company UUID
- The SAP Concur entity must have SSO configured with SAP IAS and must have configured the SAP Concur entity as an IdP target for SAP IPS.
- The SAP Concur entity must have US English enabled. The SAP Task Center defaults to US English as a fallback language.
- The customer must have selected and configured a user replication method, as detailed in the *User Replication Scenarios* section of this guide.
- The customer must have the following [Identity v4 API](#) scopes: `identity.user.sap.read`, `identity.user.sap.writeonly`. Customers who use IAS/IPS for user replication will receive those scopes automatically when configuring the IAS/IPS integration.



For more information, refer to the *Shared: Configure an SAP Concur Entity as an IdP Target* guide.

3.4 Workflow Configuration

The SAP Concur Implementation consultant performs many, if not all, of the following steps, depending on the client's Concur Expense and/or Concur Request configuration.

The Task Center is enabled separately for Concur Expense and/or Concur Request.

3.4.1 Concur Expense: Update Expense Workflow Configuration

The SAP Concur administrator enables expense report approvals in the SAP Task Center integration in **Administration > Expense > Workflows**.

On the **Settings** tab, select the **Connect SAP Concur approvals with SAP Task Center** check box.



For more information, refer to the *Concur Expense: Workflow General Information Setup Guide*.

Once this setting is selected, all expense reports will be available for the SAP Task Center integration.

3.4.2 Concur Request: Update Request Workflow Configuration

The SAP Concur administrator enables request approvals in the SAP Task Center integration in **Administration > Request > Workflows**.

On the **Settings** tab, select the **Connect SAP Concur approvals with SAP Task Center** check box.



For more information, refer to the *Concur Request: Workflow General Information Setup Guide*.

Once this setting is selected, all requests will be available for the SAP Task Center integration.

3.5 SAP Concur Company Request Token

The SAP Concur administrator can generate a company request token to use when configuring Concur Expense and/or Concur Request as a destination in SAP Task Center.

► **To obtain an SAP Concur Company Request Token:**

1. Follow the steps detailed on the [Company Request Token Self-Service Tool page](#) to generate the company request token. Use the appropriate Task Center App ID for your data center:

Data Centers	App ID
US1, EU1	a8a7ec4d-828a-4c98-9fea-9cc273c0558d
US2, EU2	d43da2d2-c0ac-4477-8de9-6c4b11057705

NOTE: Contact your SAP Concur Implementation consultant if you don't know which data center your company uses.

2. Copy and save both the Company UUID and the Company Request Token from the **Company Request Token Successfully Created** dialog.

NOTE: The Company Request Token expires after 24 hours. If you do not use the Company Request Token in the Task Center destination configuration within 24 hours, you will have to request a new token by repeating these steps.

3. Follow the steps in the [SAP Task Center documentation](#) to use the Company UUID and the Company Request Token to create the SAP Concur destination.