

# **Travel: Divisional View**

## **Travel Service Guide**

**Last Revised: January 31 2020**

Applies to Concur Travel:

- ☒ Professional/Premium edition
  - ☒ TMC Partners
  - ☒ Direct Customers
- ☐ Standard edition
  - ☐ TMC Partners
  - ☐ Direct Customers



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## Revision History

Date	Revision Notes/Comments
July 25, 2023	Updated Overview section with note on SAP Concur UI themes; no other changes
January 18, 2022	Updated the copyright year; no other changes; cover date not updated
April 14, 2021	Updated the copyright year; no other changes; cover date not updated
January 31, 2020	Removed reference to Taxi Magic
January 9, 2020	Updated note in <i>Overview</i> section
June 19, 2019	Removed "Concur" from the cover; no other changes; cover date not updated
March 10, 2019	Updated the copyright; no other changes; cover date not updated
January 2, 2018	Updated the copyright; no other changes; cover date not updated
April 20, 2016	Clarified: <ul style="list-style-type: none"><li>• Import Data</li><li>• Company Settings</li><li>• Send Mobile Instructions</li></ul>
April 11, 2014	Added clarification about the Company Group feature
February 13, 2014	General updates; moved to the new format



# Divisional View

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## Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur (if SAP Concur provides their support).

## Section 2: Overview

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**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.

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Divisional View allows a company to segment data displayed to admins based on configuration. There are some areas that will require an admin to obtain Global access to view all data due to security requirements. A view is composed of users/data belonging to one or more travel configurations.

A user's data visibility role is defined in User Administration. User Data Visibility role options are:

- **Global view:** A user with given application permission(s) (for example, User Admin) can see and act upon all users/data in the company
- **Divisional view:** A user with given application permission(s) (for example, User Admin) can see a defined "view" and has the ability to act upon specific users/data
- **NA:** Access controlled via specific permission, regardless of view role.

- **No data visibility:** A user is not permitted to see users/data belonging to their own or any other "view", regardless of given application permission(s) (for example, User Admin)

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**NOTE:** Travel Agent has not been modified to use the Divisional View data method. If Travel System Admin access is granted, all data is visible. The recommended best practice is to clone to the "TMC Tree" during an agency conversion. The TMC can access the travel config settings while the site is still on Divisional View. We can move the config to client tree, if requested, once the site is off Divisional View.

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## Section 3: Permissions and Divisional View

### In Administration > Company Admin


Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Approval Queues	NA - access controlled via specific permission	Use this page to reassign requests from one person's approval queue into another person's approval queue. <b>NOTE:</b> This is permission-based. A Divisional admin <b>should not</b> be given this access or all trips requiring approval will display.
Billing Administrator	NA - access controlled via specific permission	Use this page to view invoices from Concur Travel for a company. <b>NOTE:</b> This is permission-based. A Divisional admin <b>should not</b> be given this access or all invoices will display.
Company Locations	Global view Divisional view	Use this page to add new company locations. Both a Global and Divisional admin can add, edit, and modify company locations.
Org Unit Admin	Global view	Use this page to add, edit, and delete organization units. This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.
Report Admin	Global view Divisional view	Use this page to assign Company Report permissions to users and/or groups. <ul style="list-style-type: none"> <li>• A Global admin can assign report permissions to any user and/or group.</li> <li>• A Divisional admin can assign report permissions <b>only</b> to users in their view.</li> </ul>

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Text Customization	Global view Divisional view	<p>The text appears at the top of the user profile page. Use this page to customize per travel configuration.</p> <ul style="list-style-type: none"> <li>• A Global admin can add Profile Text to any travel configuration on the site.</li> <li>• A Divisional admin can add Profile Text <b>only</b> to travel configurations in their view.</li> </ul>
Security Keys	Global view	<p>Use this page to view, update, or delete the security keys for your company. Security keys are used to secure special applications like single sign-on (SSO).</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Password Administrator	Global view	<p>Use this page to define automated password reset rules for end users.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Import Data	Global view Divisional view	<p>Use this page to manage all imports.</p> <ul style="list-style-type: none"> <li>• A Global admin can import company-wide.</li> <li>• A Divisional admin can import relative to their view. An "Access Denied" message appears for import activity outside the admin's divisional view. For example, in a user import with some users who are inside and some who are outside the admin's divisional view: <ul style="list-style-type: none"> <li>♦ Users within the view will be imported successfully (barring other issues).</li> <li>♦ Users outside the view will not be imported; the Access Denied message appears.</li> </ul> </li> </ul>
Manage Custom Fields	Global view Divisional view	<p>Use this page to manage user and trip fields from this section.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete company-wide.</li> <li>• A Divisional admin can manage relative to their view.</li> </ul> <p><b>IMPORTANT:</b> If a Divisional admin changes or deletes a field(s) shared by other configurations, this can impact all configurations outside their view. Not all of the configurations associated with the field are displayed to the Divisional admin, since only configs in their view appear. <i>Before deleting or changing a custom field, a Divisional admin should check with a Global admin to understand the full impact.</i></p>

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Directory Server Admin	Global view Divisional view	<p>This section is complete when the client has a single Outlook server to auto-populate calendar entries from a Concur Travel reservation. This is a global setting.</p> <p>When the Company admin permission is assigned, both Global and Divisional admins have access.</p>
Company Settings	Global view Divisional view	<p>This section displays all of the SAP Concur-created (<i>Module</i>) Properties.</p> <ul style="list-style-type: none"> <li>• A Global admin sees company-wide and can edit all.</li> <li>• A Divisional admin can see and edit <b>only</b> settings based on their view.</li> </ul>
Share Custom Fields	Global view Divisional view	<p>This section allows administrators to configure custom fields (profile or trip) to send to the SAP Concur Connect hotel vendors. This is customizable by each configuration for each vendor.</p> <p>Access control is not enforced on this page.</p>
User Administration	Global view Divisional view	<p>Use this page to administer users in this section.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete all users on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> users assigned to travel configurations in their view.</li> </ul>
Add User	Global view Divisional view	<p>In this section you can add a new user.</p> <ul style="list-style-type: none"> <li>• A Global admin can apply any travel rule class, set data visibility, and specify the travel configuration(s) that a Divisional admin can see.</li> <li>• A Divisional admin can add new users <b>only</b> to Travel Rule Classes in their view.</li> </ul> <p><b>Note with Divisional Admin access:</b> When adding a new user and custom fields are limited by configuration, only the fields associated with the first configuration built will appear. Save the new login, then edit; the correct custom fields will display.</p>



Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Self-Registration Setup	Global view	<p>Use this page to edit certain text areas and disable/enable certain fields as appropriate on your company's self-registration page.</p> <p><b>NOTE:</b> Sites integrated with Expense should not have self-registration.</p> <p>Set up for this feature is global, however the feature can be enabled/disabled per travel policy rule class.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Self-Registration Approval	Global view	<p>Use this page to approve pending self-registration requests.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Send Mobile Instructions	Global view	<p>Use this page to select one or more SAP Concur users and email the Concur Mobile download and login instructions.</p> <ul style="list-style-type: none"> <li>• A Global admin can view/email all users.</li> <li>• A Divisional admin can view/email all users within the admin's view.</li> </ul>
User Permissions	Global view Divisional view	<p>Use this page to assign application permissions to users and/or groups.</p> <ul style="list-style-type: none"> <li>• A Global admin can assign permissions to any user and/or group.</li> <li>• A Divisional admin can assign permissions <b>only</b> to users in their view.</li> </ul> <p><b>NOTE:</b> A Divisional admin cannot assign permissions to groups and cannot see groups assigned.</p>
Company Groups	Global view Divisional view	<p>Use this page to create, edit, view, or delete user groups.</p> <ul style="list-style-type: none"> <li>• A Global admin can create, edit, view, and delete all groups.</li> <li>• A Divisional admin can create, edit, and view groups when they are the assigned owner. No one except a Global admin is then able to access the same group. If no owner is listed, edit and view is possible, but only users within the same configuration appear.</li> </ul> <p><b>NOTE:</b> An owner must be assigned or a group will display to all Divisional admins.</p>

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Corporate Ghost Cards	Global view Divisional view	Use this page to define and assign user(s) and/or group access to Corporate Credit Cards.  Refer to the <i>Relationship Between Company Admin, Ghost Card Admin, and Card Owner</i> section in this guide for more information.
E-Receipt Admin	Global view	Use this page to enable E-Receipt access by configuration. This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.
Travel Admin, <b>Travel Policy</b> tab	Global view Divisional view	Administer company travel policy rules. <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete policy rules for all Travel Classes on the site.</li> <li>• A Divisional Admin can add, edit, and delete policy rules <b>only</b> for Travel Classes assigned to travel configurations in their view.</li> </ul>
Travel Admin, <b>Edit Classes</b> link	Global view Divisional view	Use this page to add, edit, and delete Travel Policy Rule Classes and configuration options. <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Travel Classes for all travel configurations on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Travel Classes in their view.</li> </ul>
Travel Admin, <b>Policy Violation Reasons</b> tab	Global view Divisional view	Use this page to define violation codes/descriptions that a traveler can specify as a reason for violating a travel policy rule. <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Policy Violation Reasons for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Policy Violation Reasons for travel configurations in their view.</li> </ul>
Travel Admin, <b>Travelfusion Suppliers</b> tab	Global view Divisional view	Use this page to set the providers that Concur Travel/Travelfusion will use when searching for Internet fares. <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Travelfusion Suppliers for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Travelfusion Suppliers for travel configurations in their view.</li> </ul>

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Travel Admin, <b>Vendor FoID Admin</b> tab	Global view Divisional view	<p>Use this page to enforce form of ID (FoID) rules for certain airlines.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Vendor FoIDs for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Vendor FoIDs for travel configurations in their view.</li> </ul>
Travel Admin, <b>Travel Vendor Exclusions</b> tab	Global view Divisional view	<p>Use this page to set the air, car, and hotel providers that will be excluded from online searches.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Travel Vendor Exclusions for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Travel Vendor Exclusions for travel configurations in their view.</li> </ul>
Travel Admin, <b>Custom Text</b> tab	Global view Divisional view	<p>Use this page to specify custom text on the Concur Travel homepage, as well as other areas in Concur Travel.</p> <ul style="list-style-type: none"> <li>• A Global admin can add Custom Text to any travel configuration on the site.</li> <li>• A Divisional admin can add Custom Text <b>only</b> to travel configurations in their view.</li> </ul> <p><b>NOTE:</b> Selecting <i>All travel configurations</i> will save changes <b>only</b> to the configurations the admin is allowed to manage. If the admin has global privileges, then all configurations will be updated.</p>
Travel Admin, <b>Regional Hotel Rates</b> tab	Global view Divisional view	<p>Use this page to define company policy hotel rates (city caps) based on geographical region.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Regional Hotel Rates for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Regional Hotel Rates for travel configurations in their view.</li> </ul>
Travel Admin, <b>Travel Alternatives</b> tab	Global view Divisional view	<p>This section allows configuration of data used to calculate teleconference comparisons.</p> <ul style="list-style-type: none"> <li>• A Global admin can add, edit, and delete Travel Alternatives for any travel configuration on the site.</li> <li>• A Divisional admin can add, edit, and delete <b>only</b> Travel Alternatives for travel configurations in their view.</li> </ul>

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Travel Rule Builder	Global view Divisional view	<p>Use this page to define travel policy rule templates visible in the <b>Travel Policy</b> tab.</p> <ul style="list-style-type: none"> <li>A Global admin and Divisional admin can add, edit, and delete Travel Rule Templates for any travel configuration on the site.</li> </ul> <p><b>IMPORTANT:</b> If a Divisional admin changes or deletes a rule, this will impact all configurations. <i>Verify with a Global Admin before making changes.</i></p>
Travel Reporting	Global view	<p>Determine if the site is being used.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Travel Templates	Global view Divisional view	<p>Use this page to create pre-defined trip templates to speed up the booking process.</p> <ul style="list-style-type: none"> <li>A Global admin can add, edit, and delete Travel Templates for any travel configuration on the site.</li> <li>A Divisional admin can add, edit, and delete <b>only</b> Travel Rule Templates in their view.</li> </ul>
Credit Card BIN Restrictions	Global view Divisional view	<p>Use this page to specify sets of BIN numbers to restrict credit cards entered into the system for given travel configurations.</p> <ul style="list-style-type: none"> <li>A Global admin can set Credit Card BIN Restrictions for any travel configuration.</li> <li>A Divisional admin can set Credit Card BIN Restrictions <b>only</b> for travel configurations in their view.</li> </ul>
Unused Tickets	Global view	<p>Use this page to upload, view, and edit unused tickets that can be used by travelers when booking travel.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Meeting Center Admin	Global view	<p>Use this page to create, view, edit, and copy Concur Travel Meetings.</p> <p><b>NOTE:</b> Only the meeting admin permission is needed to see all users on the site.</p> <p>This page is available to Global admins only. A Divisional admin will see an error message and should follow the steps described there.</p>
Daily Email Settings	NA - access controlled via specific permission	<p>Use this page to send system e-mail notifications - must be activated by SAP Concur</p>

## Relationship Between Company Admin, Ghost Card Admin, and Card Owner

The table below describes the information that is accessible in Corporate Ghost Card Administration when a user has none, one, some, or all of these permissions.

Regardless of whether a user is a Global admin or a Divisional admin, **there is no ghost card administration visibility** if the user does not have the Ghost Card Administration permission.

The table below describes other combinations of these permissions:

Permissions	Global View	Divisional View
Company Admin = Yes Ghost Card Admin = Yes Card Owner = Yes	Can see card list Can edit all cards Can add cards	Can see card list Cannot edit any cards Cannot add cards
Company Admin = Yes Ghost Card Admin = Yes Card Owner = No	Can see card list Can edit all cards Can add cards	Can see card list Cannot edit any cards Cannot add cards
Company Admin = No Ghost Card Admin = Yes Card Owner = Yes	Can see owned card only Can edit owned card Can add cards	Can see owned card only Cannot edit owned card Cannot add cards
Company Admin = No Ghost Card Admin = Yes Card Owner = No	No visibility  Can add cards	No visibility  Cannot add cards

## In Reporting > Travel Reports

User Data Visibility (View/Access)	Page Overview
Global view Divisional view	Use this page to view pre-defined Concur Travel Company Reports. <ul style="list-style-type: none"><li>A Global admin can view report data for any travel configuration on the site.</li><li>A Divisional admin can view report data <b>only</b> for travel configurations in their view.</li></ul>

## In Help

Menu Option/ Feature	User Data Visibility (View/Access)	Page Overview
Various Links based on User Permission	NA - access controlled via specific permission	Access online help documentation.

## In Travel > Concur XA

User Data Visibility (View/Access)	Page Overview
Global view Divisional view	<p>Use this page to view, edit, and delete Concur Travel/GDS profile data for a user.</p> <ul style="list-style-type: none"><li>• A Global admin can view profile data for users in any travel configuration on the site.</li><li>• A Divisional admin can see and act upon all user data in the company.</li></ul> <p><b>IMPORTANT:</b> If the login ID is known, the traveler data can be accessed, so this permission should not be given to a Divisional admin.</p>

## In Profile

User Data Visibility (View/Access)	Page Overview
NA - access controlled via specific permission	Concur Travel profile.

## In Administration > Travel System Admin

User Data Visibility (View/Access)	Page Overview
Global view Divisional view	<p>Company Travel and Agency Configuration access to back-end Administration of discounts, wizard settings, direct connects, data imports, queues, etc.</p> <ul style="list-style-type: none"><li>• A Global admin can access all configurations that have been built under the same "Company (vendor) associated with this agency" field in the Agency Configuration. **Only Concur has access to see the Company (Vendor) field.</li><li>• A Divisional admin can see and act upon all configurations pointing to the same "Company (vendor)" field. There is no agency distinction.</li></ul> <p><b>IMPORTANT:</b> Agencies should not receive this permission at the company's level of access. A configuration is visible under Travel System Admin due to a field called Company (vendor) found on the Agency Config. When the travel system admin permission is assigned, all Travel Configurations are accessible.</p>

