



Concur Travel and Expense Role Provisioning

Concur Phase II Action Matrix

Attention! Effective July 3rd, all Concur Phase 1 routing in EACS will be deleted. Department SAAs are required to establish new routing assignments.

Phase 1 Role	Phase II Role	Roll to Phase II automatically in EACS?	SAA Action
Traveler	Concur User	Yes	Confirm role assignment and setup Concur routing
Travel Arranger	Concur Delegate	Yes	Confirm role assignment and setup Concur routing
Financial Previewer	Financial Previewer	No, new functionality	Confirm if role is needed, assign as appropriate and set up Concur routing
Financial Approver v1	Financial Approver v2	Yes	Confirm role assignment, assign role as needed, and setup Concur routing. Note: users cannot possess Department Head or Exception Approver role
Department Head - Cards	---	No	NA
---	Department Head	New role definition	New role; assign role for Moving/Relocation approvals as appropriate. Note: user cannot possess Financial Approver or Exceptional Approver (Org Head) roles.
Exception Approver	Exception Approver	Yes.	None. Role assigned by Central Office.
---	Department Card Admin	New Role	New role. Units with procurement cards must set up this role, a delegate to assist Procurement cardholders with distribution of charges to appropriate COA
---	PCard Holder	New role	New role. Assign role to all procurement cardholder in unit
Executive Previewer	Executive Previewer	Yes	None. Role assigned by Central Office
Executive Approver	Executive Approver	Yes	None. Role Assigned by Central Office

Changes to Concur Roles

With the expansion of Concur to non-travel reimbursements and procurement card distributions, changes to Concur roles were necessary to address concerns raised by users and reduce complexity.

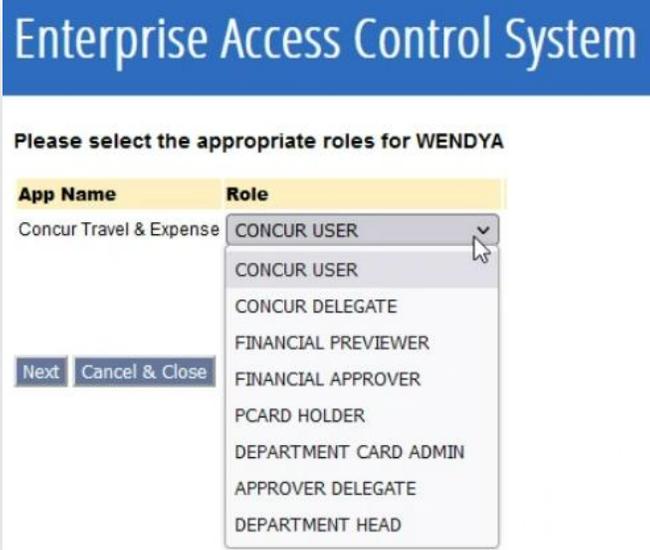
The new roles will apply to travel requests, travel reimbursements, non-travel reimbursements, and procurement card distributions.

The changes should:

- Simplify the experience for employees requesting reimbursement
- Ensure explicit routing when Previewers are defined
- Reduce approval delays when a designated individual is out of the office

To accomplish these improvements, SAAs will be required to perform updates in EACS. Additional guidance will be provided.

Concur Phase II roles are currently unavailable in EACS for provisioning.



The screenshot displays the 'Enterprise Access Control System' interface. It prompts the user to 'Please select the appropriate roles for WENDYA'. A table with two columns, 'App Name' and 'Role', is shown. The 'App Name' is 'Concur Travel & Expense'. A dropdown menu is open for the 'Role' column, listing several options: CONCUR USER, CONCUR USER, CONCUR DELEGATE, FINANCIAL PREVIEWER, FINANCIAL APPROVER, PCARD HOLDER, DEPARTMENT CARD ADMIN, APPROVER DELEGATE, and DEPARTMENT HEAD. A mouse cursor is pointing at the first 'CONCUR USER' option. Below the table are 'Next' and 'Cancel & Close' buttons.

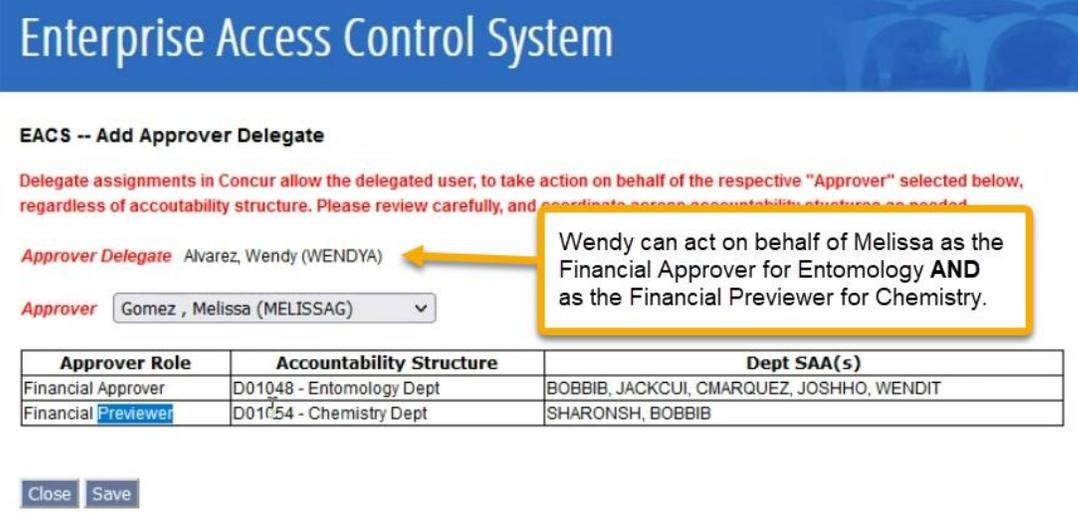
App Name	Role
Concur Travel & Expense	CONCUR USER
	CONCUR USER
	CONCUR DELEGATE
	FINANCIAL PREVIEWER
	FINANCIAL APPROVER
	PCARD HOLDER
	DEPARTMENT CARD ADMIN
	APPROVER DELEGATE
	DEPARTMENT HEAD

New Concur Roles

- **Concur Users** can process Concur Request and Expense Reports for travel and non-travel reimbursements.
- **Concur Delegates** are optional for travel booking and transacting non-travel reimbursements (acting on another user's behalf). Additionally, Concur Delegates are assigned to a Concur User, not an accountability structure, which may impact those who prepare for multiple accountability structures. Concur Delegate assignments are limited to 250 per user.
- **Financial Previewer** role(s) are optional. If defined, requests will be explicitly routed to this role before proceeding to the Financial Approver. Concur routing allows for the assignment of only one Financial Previewer per Accountability Structure, who will be listed as the previewer for Concur routing.

New Concur Roles

- **Financial Approver** is a required routed role by Accountability Structure. Concur routing allows for the assignment of Financial Approvers per Accountability Structure, who will be listed as the Financial Approvers for Concur routing, including for T&E Card and PCard issuance requests.
- **Approver Delegate** users act as a delegate Financial Previewer and/or Financial Approver on behalf of the respective approver. Regardless of the Concur User or Accountability Structure(s) involved, the Approver Delegate has the authority to perform the respective approvals.
 - This approach addresses delays when the Previewer and/or Approver is out of the office when the delegate role is assigned.



Enterprise Access Control System

EACS -- Add Approver Delegate

Delegate assignments in Concur allow the delegated user, to take action on behalf of the respective "Approver" selected below, regardless of accountability structure. Please review carefully, and coordinate across accountability structures as needed.

Approver Delegate Alvarez, Wendy (WENDYA)

Approver Gomez, Melissa (MELISSAG)

Wendy can act on behalf of Melissa as the Financial Approver for Entomology **AND** as the Financial Previewer for Chemistry.

Approver Role	Accountability Structure	Dept SAA(s)
Financial Approver	D01048 - Entomology Dept	BOBBIB, JACKCUI, CMARQUEZ, JOSHHO, WENDIT
Financial Previewer	D01054 - Chemistry Dept	SHARONSH, BOBBIB

Close Save

New Concur Roles

- **Department Head** is required to be designated in EACS
 - Restricted to one per accountability structure.
 - Approves Relocation Expense Reports.
 - Financial Approvers, Department Heads, and Executive Approvers must be distinct users.
- **Exceptional Approver/Delegate**—Required at the ORG level
 - **Delegated Exceptional Approver** users would require an understanding of how to handle an offline approval of a true exception, knowing they serve as a proxy.
 - Restricted to one per Org
- **PCardholder** (Company Billed Statements (CBS) User)
 - Users with the PCardholder role will have access to distribute PCard expenses in Concur.
 - Same approval flow with optional **Financial Previewer** and required **Financial Approver** will be used to approve distribution of PCard expenses.
- **Department Card Administrator (DCA)**
 - Delegate of the PCardholder and can distribute PCard expenses in Concur on behalf of the PCardholder.