User Administration User Guide

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Available Permissions and Roles

The following lists contain the available permissions and roles for Expense, Invoice, Travel, and Analysis/Intelligence. The roles are separated into tables based on the tabs in User Permissions.

Travel Tab

None of the Travel permissions are assigned along with a group.

Travel Tab	
Permission	**Description**
App Center Listing Administrator	The user assigned this role can submit App Center listings. This role is only assigned by SAP Concur to certain App Center partners.
Administer Approval Queue	The user assigned this role can reassign approval requests. You can assign this permission by itself.
Agency Billing Administrator	Allows users to access agency billing administration
Authorized Support Contact	The user assigned this role is can access the SAP Concur support portal to receive phone and chat support. Depending on your organization's configuration*, the user can also access SAP Biller Direct (the billing portal) to review and collect invoices, and update billing details. *Restricted to Public Sector and Partner-led customers. Travel users with this role must be assigned the Company Administration role. A minimum of two users must be assigned, up to a maximum of 5 users. ⓘ **Note** It is advised to keep the list of ASC users updated to enhance security and efficiency. When unassigning the ASC role from a user, it must be unassigned using the same steps the permission was assigned. Deactivating the user (via API or employee import) does not unassign the ASC role automatically.
Billing Administrator	The user assigned this role can view bills from SAP Concur. You must assign this permission with one other administration permission.
Cliqbook User	Can integrate with Cliqbook service.
Company Administration	The user assigned this role can access: • Administer Approval Queue • Authentication Administration • Billing Administrator • Company Locations Administration • Corporate Ghost Cards • Group and Shared Resources Administration

This is custom documentation. For more information, please visit SAP Help Portal.

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Travel Tab	
Permission	**Description**
	- Managed Meeting Center Admin (ONLY if the Third Party Meeting Module has been enabled) - Organization Unit Administration - Permission Administrator - Risk Management Admin (Used with Concur Risk Management) - Travel Policy Administrator - User Administration - The Manage User Apps page to restrict the User applications in the SAP Concur App Center for their company's users. This user can also enable Enterprise partner applications within the SAP Concur App Center. - For more information, refer to the Shared: App Center Administrator User Guide. ⅈ **Note** When you also select the User Administration permission, the User Permissions link becomes available in Company Administration.
Company Discount Administrator	The user assigned this role can add Travel site-level discounts. This feature is available to the user when you select this permission and the Allow Discount Editing option has been enabled in the Company Travel Configuration for the customer site. **More Information:** Refer to the Discounts Travel Service Guide. This permission must be combined with the Travel Policy Administrator permission.
Company Link Administrator	The user assigned this role can include/exclude links, redirect links, and add new links to the Travel Tools page **More Information:** Refer to the Company Link Administrator Travel Service Guide.
Company Locations and Maps	The user assigned this role can enter locations for travelers to use when searching for hotels or off-airport car locations.
Concur Meeting Accountant	The user assigned this role can add credit cards to a meeting and download payment files. ⅈ **Note** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.
Concur Meeting Admin	The user assigned this role can access Concur Meeting administration **with** the SAP Concur registration module ⅈ **Note** This permission will appear only if you have enabled Meeting via the new site setup work order.
Concur Meeting Planner	Allows user to access **all** Meeting pages **except**:

Travel Tab	
Permission	Description
	- Travel > Form of Payment - Tracking > Payment (the Edit link is hidden from within the Payment page)
Corporate Ghost Card Administrator	The user assigned this role can access to the Corporate Ghost CardsTravel > Agency Settings link on the Company Admin page. ⅈ **Note** The Company Groups link and the links in the Group Administration section are always present for anyone with administrative privileges, but users can only edit (not add) groups they own if they do not also have the Group and Shared Resources Administration permission. The standalone **Corporate Ghost Card Administrator** permission will only give an option to add a new card. To view and edit the existing ghost cards the user should also have either one of the following permissions along with the Corporate Ghost Card Administrator: - Company Administration - Group and Shared Resources Administration ⅈ **Note** Travel For more information, refer to **the Relationship Between Company Admin, Ghost Card Admin, and Card Owner** topic in the **Divisional View Travel Service Guide**.
Custom Field Administrator	The user assigned this role can access to the Manage Custom Fields link on the Company Admin page. ⅈ **Note** The Company Groups link and the links in the Group Administration section are always present for anyone with administrative privileges, but users can only edit (not add) groups they own if they do not also have the Group and Shared Resources Administration permission. **More Information:** Refer to the Custom Text Travel Service Guide.
Data Retention Administrator	The user is assigned this role can access the Data Retention link on the Company Admin page and the Hold User and Purge User buttons in User Administration. **More Information:** Refer to the **Shared: Data Retention Setup Guide** and the **Shared: Data Retention User Guide.**
Employee Maintenance	The user assigned this role can manage employees, including assigning roles, delegates, and preferences. However, they cannot create a new user account. **More Information:** Refer to the **User Administration in Travel, Expense, Invoice, and Request** section of this guide for more information about assigning roles.
Group and Shared Resources Administration	The user assigned this role can view and modify groups. You can assign this permission by itself. ⅈ **Note**

Travel Tab	
Permission	**Description**
	If a user owns a group or is in a group that owns a group, the user will not be able to modify that group without this permission. Ownership of a group provides no additional access.
Guest Booking	The user assigned this role can create reservations for non-profiled travelers. **More Information:** Refer to the Sponsored Guest User Travel Service Guide and the Non-Profiled Travel Travel Service Guide.
Import Data Administrator	The user assigned this role can import data from a customer site, instead of logging into the agency site and selecting ▌Administration ❯ Travel ❯ Travel System Admin ❯ Import Data ▌.
Localization Admin / Localization User	Localization Admin is assigned only **to** SAP Concur employees; Localization User is assigned only **by** a Localization Admin
Manifest Administrator	The user assigned this role can perform a multi-user clone. This role allows companies to determine who should manage travel on behalf of a large group.
Meeting Center Developer Third Party	The user assigned this role can test screens and documentation for a third-party meeting product with XML integration. ⓘ **Note** This permission appears only if you have enabled Concur Meeting via the new site setup work order.
Online Order Form Access	The user (TMC) assigned this role can allow its agents to access to the online order form. ⓘ **Note** This permission is visible only when the Concur Travel Reseller module is given to the TMC by SAP Concur. **More Information:** Refer to the Online Order Form Travel Service Guide.
Organization Unit Administration	The user assigned this role can create and edit organizational units. You can assign this permission by itself.
Password Manager	The user assigned this role can update passwords for Travel users. User will have read only access to the following fields on the user details page in User Administration: Title, First Name, Middle Name, Nickname, Last Name, Suffix, and Email. **Preventing Access:** A module property is available to restrict this role from changing passwords - contact SAP Concur directly to have the Password Access Restriction feature activated. ⓘ **Note** The users with Travel and either Expense or Invoice have one password for all applications. When any of the Password Manager roles changes a password, it changes for all applications.
Permission Administrator	The user assigned this role can access the User Permissions menu and the Travel tab. ⓘ **Note**

Travel Tab	
Permission	**Description**
	This role is automatically assigned when the Role Administrator role is assigned via Expense, Invoice, and Request.
Profile Sync Administrator	The user assigned this role can update and retrieve passwords from the **Profile Sync Configuration** page.
Profile User	The user assigned this role can update their profile only and not have access to the Travel booking wizard. **ⓘ Note** When a site is created, the 'ALL' group is automatically added to the Travel Wizard User permission. You must manually remove the 'ALL' group from this permission if you do not want travelers to have access to update both their profile and make a reservation. Make sure the Project team has access to the booking wizard for testing purposes by creating another Group for that team and granting the appropriate permissions.
Report Admin	The user assigned this role can define who has access to reports. **More Information:** Refer to the **Travel Reporting User Guide.** You can assign this permission by itself.
Report User	The user assigned this role can view reports. You must assign this permission in order for users to view company reports; however, you must also assign individual reports in the Report Admin. **More Information:** Refer to the **Travel Reporting User Guide.** You can assign this permission by itself.
Risk Management Admin	The user assigned this role can use the Concur Risk Management feature. **More Information:** Refer to the **Authorization Request: Risk Management User Guide** for more information.
Self-assigning Assistant	The user assigned this role can assign themselves as an assistant. If you assign this permission to a user or group, those users can select a traveler to assist.
Self-Registration Approver	The user assigned this role can approve the self-registrations within his/her own company. **More Information:** Refer to the **Self-Registration Travel Service Guide.**
SSO Manager	The user assigned this role can access the **Manage Single Sign-On** page under **Home** > **Authentication Admin**.
Sponsor	The user assigned this role can be assigned as the sponsor for the guest user. **More Information:** Refer to the **Sponsored Guest User Travel Service Guide.**
Travel Agent	The user assigned this role can access Expert Agent (XA), if you have also assigned the Company Administration permission. With this permission: • The **Travel System Admin** link may be displayed but will only provide data based on the backend setup.

Travel Tab	
Permission	**Description**
	• The Import Data link will appear within Company Administration.
Travel Meeting Center Admin Third Party	The user assigned this role can use a third-party meeting product with XML integration administrator screens; allows Concur Meeting administration **without** the SAP Concur registration module. ⓘ **Note** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.
Travel Meeting Center User	The user assigned this role can access meetings to which they are invited (this is for both third-party and Concur Meeting products). ⓘ **Note** This permission will appear only if you have enabled Concur Meeting via the new site setup work order.

Travel Policy Administrator	The user assigned this role can administer Travel Policy.
	
	You can assign this permission by itself.
	
	Assigning this permission provides access to:
	
	• E-Receipt Admin
	
	• Travel Admin
	
	• Travel Rule Builder
	
	• Travel Reporting
	
	• Travel Templates (administering for all users)
	
	• Credit Card BIN Restrictions
	
	• Unused Tickets
	
	• Meeting Center Admin
	
	    ⓘ **Note**
	    This link appears if you have assigned Meetings Admin permission or Travel Meeting Center Admin Third Party permission.
	
	• Manage Corporate Discounts
	
	    ⓘ **Note**
	    This link appears if you have assigned both this permission and the Company Discount Administrator permission.

Travel Wizard User	The user assigned this role can access to the Travel profile and Travel Wizard to make online reservations. This permission is automatically assigned to ALL (group).

This is custom documentation. For more information, please visit SAP Help Portal.

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Travel Tab	
Permission	**Description**
UI Preview	The user assigned this role can preview the enhanced user interface.
User Administration	The user assigned this role can modify and add Travel users. Assigning this permission provides access to: • Add User • Self-Registration Setup • Self-Registration Approval • Send Mobile Instructions • Company Groups ⓘ **Note** A user assigned the User Administration permission will be able to see but not use Company Groups (User Administration section of the left menu) unless the user is also assigned the Group and Shared Resources Administration permission. ⓘ **Note** Users assigned to this permission will be able to assign employees to Company Groups and Rule Classes which could result in granting them user permissions which are enabled for such Company Groups and Rule Classes.
User Admin (Read Only)	The user assigned this role can view but not change **any** user information, including passwords; the user can view using the User Admin page but cannot access the user's profile. ⓘ **Note** If the user also has Employee Maintenance or Sponsor permission, those permissions take precedence this permission.
Virtual Payment Administrator	Allows users to manage Virtual Payments (Conferma) **More Information:** Refer to the Virtual Payment (Conferma) Travel Service Guide.
Web Services Administrator	The user assigned this role can: • Access the Partner Application Administration page to register or enable partner applications to access the company's data using the SAP Concur web services. The partner applications are required for some integrations, and do not appear in the SAP Concur App Center. • Access the Manage User Apps page to restrict the User applications in the SAP Concur App Center for their company's users. • Enable Enterprise partner applications within the SAP Concur App Center. **More Information:** For more information, refer to the Shared: App Center Administrator User Guide.
zAuto-Cancel User	The user assigned this role can test general functionality in Concur Travel. Reservations made by users with this permission:

Travel Tab	
Permission	Description
	- Will not have custom PNR finishing remarks added - Will not be queued to any queues defined in the Agency Configuration - Will not show in reports - Will be auto-canceled in the GDS after 4 hours
zDemo/Training/ Practice User	The user assigned this role can test the integration between Concur Travel and other SAP Concur products. Reservations made by users with this permission: - Will generate "demo" e-tickets and e-receipts - Will not have custom PNR finishing remarks added - Will not be queued to any queues defined in the Agency Configuration - Will not show in reports - Will be auto-canceled in the GDS after 4 hours When applied to a login ID, the SAP Concur standard invoicing practices will apply unless you utilize the non-invoiced policies. **More Information:** Access additional information via the SAP Concur support portal. ⓘ **Note** In emergency situations, you can use the **agent claimed** remark to prevent bookings made with Z Demo permission from being auto-cancelled.

Expense Tab

Expense Tab		
Role	Description	Product Area
App Center Listing Administrator	The user assigned this role can submit App Center listings. This role is only assigned by SAP Concur to certain App Center partners.	Shared with two or more SAP Concur products
Attendee Administrator	The user assigned this role can view, modify, and activate or inactivate any attendee record in the system. **Group-aware**: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Attendee Administrator (Read only)	The user assigned to this role is considered a read-only auditor. The user can access and view but not modify and activate or inactivate an attendee record in the system. **Group-aware**: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Authorized Approver	This is special approver role, which is not assigned the same way as other roles.	Expense

Expense Tab		
Role	**Description**	**Product Area**
	More Information: Refer to the Expense: Workflow - Authorized Approvers Setup Guide.	
Authorized Support Contact	The user assigned this role is can access the SAP Concur support portal to receive phone and chat support. Depending on your organization's configuration*, the user can also access SAP Biller Direct (the billing portal) to review and collect invoices, and update billing details. *Restricted to Public Sector and Partner-led customers. Expense users with this role must be assigned both the Shared Configuration Administrator (Restricted) and Expense Configuration Administrator (Restricted) roles. A minimum of two users must be assigned, up to a maximum of 5 users. **ⁱ Note** It is advised to keep the list of ASC users updated to enhance security and efficiency. When unassigning the ASC role from a user, it must be unassigned using the same steps the permission was assigned. Deactivating the user (via API or employee import) does not unassign the ASC role automatically.	
Budget Administrator	**More Information:** The user assigned this role configures the Fiscal Calendar, Budget Categories, Budget Tracking Fields, Budget Items, and Budget Settings. The Budget Administrator can see the budget amounts as configured in the Budget Items, but not the budget actuals as is shown in the dashboards. Budget Administrators have access to all budget items within an entity. For Budget documentation, refer to the Shared: Budget Setup Guide.	Shared with two or more SAP Concur products
Budget Approver/Manager	**More Information:** The user assigned this role approves invoices, purchase requests, and expense reports and can view budgets in the budget dashboards. The Budget Approver does not have access to the budget configuration information. For Budget documentation, refer to the Shared: Budget Setup Guide.	Shared with two or more SAP Concur products
Budget Owner	The user assigned this role owns the budget and can view budgets in the dashboards. The Budget Owner does not have access to the budget configuration information. **More Information:** For Budget documentation, refer to the Shared: Budget Setup Guide.	Shared with two or more SAP Concur products
Budget Viewer	The user assigned this role views budgets in the dashboards. There can be one or several budget viewers. The Budget Viewer does not have access to the budget configuration information. **More Information:** For Budget documentation, refer to the Shared: Budget Setup Guide.	Shared with two or more SAP Concur products
Card Program Administrator	The user assigned this role manages the company's purchase card program and statement periods.	Expense

Expense Tab		
Role	**Description**	**Product Area**
	Group-aware: When assigning this role, one or more groups must be selected.	
Central Reconciliation Processor	The user assigned this role processes (matches) invoice transactions associated with requests generated within the Request product. **Group-aware**: When assigning this role, one or more groups must be selected.	Expense
Client Expense Administrator	**This custom role is not available to all clients; availability is based on the client configuration.** It combines permissions from the Expense Configuration Administrator role and the Shared Configuration Administrator. The user assigned this role can access these options (some may allow add/edit; some may be view-only): • Accounting administration • Audit rules • Car configuration • Email reminders • Exceptions • Expense Types • Locations • Policies • Travel allowance • Workflows	Expense
Company Bill Statement Approver	The user assigned this role approves statement reports. This user must also be assigned the **Expense Approver** role. **More Information:** Refer to the **Expense: Company Bill Statement Reports Setup Guide**.	Expense
Company Bill Statement Processor	The user assigned this role views and updates statement reports in Expense Processor. This user must also be assigned the **Expense Processor** role. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the **Expense: Company Bill Statement Reports Setup Guide.**	Expense
Company Bill Statement Processor (Audit)	The user assigned this role views statement reports in Expense Processor in read-only format. This user must also be assigned the **Expense Processor (Audit)** role. **Group-aware**: When assigning this role, one or more groups must be selected.	Expense

Expense Tab		
Role	**Description**	**Product Area**
	More Information: Refer to the Expense: Company Bill Statement Reports Setup Guide.	
Company Bill Statement Processor Manager	The user assigned this role views, updates, and deletes statement reports in Expense Processor. This user must also be assigned the Expense Processor Manager role. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the Expense: Company Bill Statement Reports Setup Guide.	Expense
Company Bill Statement User	The user assigned this role reviews and submits the purchasing card transactions in the statement reports. This user must also be assigned the Expense User role. **More Information:** Refer to the Expense: Company Bill Statement Reports Setup Guide.	Expense
Company Info Administrator	The user assigned this role can update the Company Info section of the home page.	Shared with two or more SAP Concur products
Concur Mobile User	**Do not use; is not associated with the SAP Concur mobile app.**	
Cost Object Approver	This is special approver role, which is not assigned the same way as other roles. **More Information:** Refer to the Expense: Workflow – Cost Object Approvers Setup Guide.	Expense
Data Retention Administrator	The user assigned this role views and configures the data retention policy for the company and can hold and purge individual users.	Shared with two or more SAP Concur products
Digital Compliance Administrator	The user assigned this role views the E-Bunsho Timestamp validation tool.	Expense
Employee Administrator	The user assigned this role can add and manage employees, including assigning roles, delegates, and preferences. The user can only assign the basic user roles (Expense User, Travel User), using the check boxes on the User Details page. They may also view and optionally edit and register cars on behalf of a user. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the User Administration in Travel, Expense, Invoice, and Request section of this guide for more information about assigning roles. Refer to Expense: Car Configuration Setup Guide for information about configuration and managing cars for the user.	Shared with two or more SAP Concur products
Employee Administrator (Read Only)	The user assigned to this role is considered a read-only auditor. The user can view but not add or edit employee records. **Group-aware**: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
	More Information: Refer to the User Administration in Travel, Expense, Invoice, and Request section of this guide for more information about assigning roles.	
Employee Maintenance	The user assigned this role can manage employees, including assigning roles, delegates, and preferences. However, they cannot create a new user account. **Group-aware:** When assigning this role, one or more groups must be selected. **More Information:** Refer to the User Administration in Travel, Expense, Invoice, and Request section of this guide for more information about assigning roles.	Shared with two or more SAP Concur products
Expense Approver	The user assigned this role can approve expense reports within an assigned group. ⓘ **Note** This approver is also automatically assigned as the Travel Approver if the employee is a Travel user.	Expense
Expense Cash Advance Administrator	The user assigned this role can view, issue, and manage cash advance requests. **Group-aware:** When assigning this role, one or more groups must be selected.	Expense
Expense Company Card Administrator	The user assigned this role can: • Assign and unassign company cards • Map expense types to merchant category codes **Group-aware:** When assigning this role, one or more groups must be selected.	Expense
Expense Configuration Administrator	**This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.** The user assigned this role can **fully manage** (add, edit, delete): • Expense group configurations • Policies • Expense-based forms and fields, validations, and vendor lists • Expense report and authorized approver workflows • Audit rules • Expense types and expense categories • Payment types • Account codes • Exceptions • Car configuration and reimbursement	Expense

Expense Tab		
Role	**Description**	**Product Area**
	• Receipt handling, including payment hold, scan configurations, receipt limits, and receipt imaging • Email reminders • Reimbursement currencies • Offline settings • Configuration change log (view only) • Taxability and Deductibility Calculation Service **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** This role is generally assigned with the Shared Configuration Administrator role.	
Expense Configuration Administrator (Restricted)	The user assigned this role can **fully manage** (add, edit, delete): • Vendor list items • Authorized approvers • Audit rules • Account codes • Exceptions • Personal and company car rates • Receipt handling, including receipt limits, payment hold, and scan configurations • Email reminders • Configuration change log (view only) **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.	Expense
Expense Processor	The user assigned this role: • Can view and update expense reports within Expense Processor • Cannot delete expense reports The **Access for Processor** field limits the reports the processor can view to these options: • Display all reports excluding returned reports	Expense

Expense Tab		
Role	**Description**	**Product Area**
	- Display all reports including returned reports - Display only reports pending processor step and beyond **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are: 1. Expense Processor Manager 2. Expense Processor 3. Expense Processor (Audit)	
Expense Processor (Audit)	The user assigned this role: - Can view expense reports within Expense Processor - Cannot update or delete expense reports **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are: 1. Expense Processor Manager 2. Expense Processor 3. Expense Processor (Audit)	Expense
Expense Processor Manager	The user assigned this role can view, update, and delete expense reports within Expense Processor. The **Access for Processor** field limits the reports the processor can view to these options: - Display all reports excluding returned reports - Display all reports including returned reports - Display only reports pending processor step and beyond **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note**	Expense

Expense Tab		
Role	**Description**	**Product Area**

	The user should only be assigned one of the Expense Processor roles. If the user is assigned multiple Expense Processor roles, the role with the greatest level of access will be applied. The levels of access, from highest to lowest, are:
	
	    1. Expense Processor Manager
	
	    2. Expense Processor
	
	    3. Expense Processor (Audit)	

Expense Proxy Logon	The user assigned this role can log on to Expense and act as a proxy user for other employees within an assigned group. **Group-aware**: When assigning this role, one or more groups must be selected.	Expense
Expense Receipt Processor	The user assigned this role can update the receipt status for an expense report.	Expense
Expense User (formerly Concur Expense User)	The user assigned this role can create and submit expense reports and cash advances if those features are used by the user's company.	Expense
Extract Administrator	Special role assigned by the SAP Concur Implementation department to clients who are transitioning from the Standard Edition to the Professional Edition. This role provides access to the File Export Configuration tool.	Expense
Fringe Benefits Tax Administrator	Along with the Tax Administration role, the user assigned this role can manage fringe-benefit tax.	Expense
Import/Extract Administrator (formerly Integration Administrator)	**This role is intended to be assigned to and used by SAP Concur internal staff only.** A user assigned this role can: • Manage (add, edit, delete) import, extract, archive, and reporting consolidation jobs • Schedule jobs • View the system log	Shared with two or more SAP Concur products
Import/Extract Monitor (formerly Integration Administrator - Restricted)	A user assigned this role can **view**: • Details of import, extract, archive, and reporting consolidation jobs • Job schedule • System logs Depending on configuration, this user may also be able to: • Upload import files • Download extract files	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
Integration Manager	The user assigned this role can access the Monitor Integrations page (**Administration > Tools > Monitor Integrations**), has the ability to browse and search obligation documents, and has permission to Retry or Send Back obligation documents. This role is associated with the Funds and Grants Integration with Concur Solutions. **More Information:** For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.	Shared with two or more SAP Concur products
Integration Manager Advanced	The user assigned this role can access the Monitor Integrations page, has the ability to browse and search obligation documents, and has permission to Retry, Send Back, or Bypass obligation documents. This role is associated with the Funds and Grants Integration with Concur Solutions. **More Information:** For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.	Shared with two or more SAP Concur products
Integration Manager View Only	The user assigned this role can access the Monitor Integrations page, and has the ability to browse and search obligation documents, but they cannot perform any actions for obligation documents on the page. This role is associated with the Funds and Grants Integration with Concur Solutions. **More Information:** For more information, refer to the Shared: Funds and Grants Integration with Concur Solutions Setup Guide for Professional Edition.	Shared with two or more SAP Concur products
Intelligent Enterprise Suite (IES) Integrations Administrator	This user assigned this role can access the SAP Master Data Integration Mapping page and can manage field mappings for field data imported from the SAP Master Data Integration to the corresponding SAP Concur fields. This role is associated with the SAP Concur integration with SAP Master Data Integration service. ⓘ **Note** A user can be assigned the Intelligence Enterprise Suite (IES) Integrations Administrator or SAP Master Data Integration Administrator role to access the SAP Master Data Integration Mapping page. The user does not need to be assigned to both roles. **More Information:** For more information, refer to the *SAP Concur Integration with SAP Master Data Integration Setup Guide*.	Shared with two or more SAP Concur products
Password Manager	The user assigned this role can update passwords for Expense users. User will have read only access to the following fields on the User Details page in User Administration: Title, First Name, Middle Name, Nickname, Last Name, Suffix, and Email.	Shared with two or more SAP Concur products

Expense Tab

Role	Description	Product Area
	Preventing Access: A module property is available to restrict this role from changing passwords - contact SAP Concur directly to have the **Password Access Restriction** feature activated. ℹ **Note** • The users with Expense and either Travel or Invoice have one password for all applications. When any of the Password Manager roles changes a password, it changes for all applications. • **Group-aware**: When assigning this role, one or more groups must be selected.	
Payroll Administrator	A user assigned this role can perform these actions in the **Payroll Integration** tool (used by the Payroll Integration for SAP ECC, SAP S/4HANA, and SAP S/4HANA Cloud): • Manage Payroll Settings • Manage Wage Types • Re-send failed payroll documents	Expense
Reimbursement Auditor	A user assigned this role can **view** Expense Pay functionality: • Funding Accounts • Batch Configurations • Card Programs • Expense Pay Settings • Current and Historical Batch List • Daily Funding and Returned Amounts • Payment Demand List • Report Payees List • Employee Banking Status	Shared with two or more SAP Concur products
Reimbursement Manager	A user assigned this role can **fully manage** (add, edit, delete) Expense Pay functionality: • Funding Accounts • Batch Configurations • Card Programs • Expense Pay Settings In addition, a user assigned this role can **view** the following Expense Pay details: • Current and Historical Batch List	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
	• Daily Funding and Returned Amounts • Payment Demand List • Report Payees List Only **global** Reimbursement Managers can **create** payment demands and **view**: • Employee Banking Status **Group-aware**: When assigning this role, one or more groups must be selected.	
Role Administrator	A user assigned this role is granted access to the Expense, Invoice, and Request tabs through User Permissions. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the User Administration in Travel, Expense, Invoice, and Request section of this guide for more information.	Shared with two or more SAP Concur products
Role Builder	**This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.**	Shared with two or more SAP Concur products
SAP Master Data Integration Administrator	This user assigned this role can access the SAP Master Data Integration Mapping page and can manage field mappings for field data imported from the SAP Master Data Integration to the corresponding SAP Concur fields. This role is associated with the SAP Concur integration with SAP Master Data Integration service. ⓘ **Note** A user can be assigned the Intelligence Enterprise Suite (IES) Integrations Administrator or SAP Master Data Integration Administrator role to access the SAP Master Data Integration Mapping page. The user does not need to be assigned to both roles. **More Information:** For more information, refer to the *SAP Concur Integration with SAP Master Data Integration Setup Guide*.	Shared with two or more SAP Concur products
Shared Configuration Administrator	**This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.** The user assigned this role can **fully manage** (add, edit, delete): • Feature hierarchies for Expense Reports and Vendor Invoices • Employee group configurations, including assignment of the employee form • Employee forms and fields, validations, and custom and connected lists • Expense and payment delegate configurations • Reimbursement currencies • Imaging settings	Shared with two or more SAP Concur products

Expense Tab		
Role	**Description**	**Product Area**
	• Accounting structure (ledgers) • Localization tasks • Configuration change log (view only) **Group-aware**: When assigning this role, one or more groups must be selected.	
Shared Configuration Administrator (Restricted)	The user assigned this role can: • Access Locations (add or edit) • View, add, edit, and delete custom list items • View the configuration change log **Group-aware**: When assigning this role, one or more groups must be selected.	Shared with two or more SAP Concur products
Tax Administrator	The user assigned this role can **fully manage** (add, edit, delete) value added tax (VAT): • Tax configurations • Rates	Expense
Training Administrator	The user assigned this role can access the Training Administration tool to configure client-preferred Training landing page and the contents and contact information that displays.	Shared with two or more SAP Concur products
Verify Administrator	Can configure the Concur Verify application.	Expense
Verify Reports Auditor	Can perform audit tasks within the Concur Verify Reports Audit pages.	Expense
Travel and Expense Pilot User	**Do not use - this role is retired.**	
Travel and Expense User	The user assigned this role can access SAP Concur. The user requires an additional role (Expense User, Travel User, etc.) to access SAP Concur products.	Shared with two or more SAP Concur products
UI Preview	The user assigned this role can preview the enhanced user interface.	Shared with two or more SAP Concur products
Web Services Administrator	The user assigned this role can: • Access the Partner Application Administration page to register or enable partner applications to access the company's data using the SAP Concur web services. The partner applications are required for some integrations, and do not appear in the SAP Concur App Center. • Access the Manage User Apps page to restrict the User applications in the SAP Concur App Center for their company's users. • Enable Enterprise partner applications within the SAP Concur App Center	SAP Concur Connect

Expense Tab		
Role	Description	Product Area
	More Information: For more information, refer to the Shared: App Center Administrator User Guide.	

Request Tab

Request Tab	
There are several other roles available on the Request tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Authorized Support Contact	The user assigned this role is can access the SAP Concur support portal to receive phone and chat support. Depending on your organization's configuration*, the user can also access SAP Biller Direct (the billing portal) to review and collect invoices, and update billing details. *Restricted to Public Sector and Partner-led customers. Request users with this role must be assigned the Request Configuration Administrator (Restricted) role. A minimum of two users must be assigned, up to a maximum of 5 users. ⓘ **Note** It is advised to keep the list of ASC users updated to enhance security and efficiency. When unassigning the ASC role from a user, it must be unassigned using the same steps the permission was assigned. Deactivating the user (via API or employee import) does not unassign the ASC role automatically.
Request Administrator	This is one of the Request processor roles. The user assigned this role can view and fully manage virtually all requests. **Group-aware:** When assigning this role, one or more groups must be selected. **More Information:** Refer to the Authorization Request: Processor User Guide.
Request Approver	The user assigned this role can approve requests within their assigned group.
Request Auditor	This is one of the Request processor roles. This is a read-only role. The SAP Concur client can assign this role to TMCs, to its own internal travel agent(s), or to any other user that needs read-only access to requests. **Group-aware:** When assigning this role, one or more groups must be selected. **More Information:** Refer to the Authorization Request: Processor User Guide.
Request Configuration Administrator	**This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.** The user assigned this role can **fully manage** (add, edit, delete) all **request-related** features on the Request Admin menu. **Group-aware:** When assigning this role, one or more groups must be selected. ⓘ **Note**

Request Tab

There are several other roles available on the Request tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.

Role	Description
	This role is generally assigned with the Shared Configuration Administrator role.
Data Retention Administrator	The user is assigned this role views and configures the data retention policy for the company and can hold and purge individual users.
Request Configuration Administrator (Restricted)	The user assigned this role can **fully manage** (add, edit, delete): • List management • Locations • Segment types • Travel agency offices **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.
Request Event Manager	The user assigned this role can create a "master" event request for multiple event attendees. This role must be assigned with the Request Proxy Logon role.
Request Proxy Logon	The user assigned this role can log on to Request and act as a proxy user for other employees within an assigned group. **Group-aware**: When assigning this role, one or more groups must be selected.
Request User	The user assigned this role can create and submit requests.
Risk Manager	This permission appears only if Request is integrated with Concur Risk Management. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the Authorization Request: Risk Management User Guide for more information.
TMC Agent	This is one of the Request processor roles. The SAP Concur client assigns this role to one or more agents of its Travel Management Company (TMC) or to the client's internal travel agent(s). In some regions, it is appropriate for the TMC Agent to access the request after the user submits it but before the approver receives it. This way, the TMC Agent can add/edit the segment amounts – ensuring accuracy for the request approver. **Group-aware**: When assigning this role, one or more groups must be selected. **More Information:** Refer to the Authorization Request: Processor User Guide.

Invoice Tab

This is custom documentation. For more information, please visit SAP Help Portal.

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Invoice Tab
There are several other roles available on the Invoice tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.

Role	Description
Authorized Support Contact	The user assigned this role is can access the SAP Concur support portal to receive phone and chat support. Depending on your organization's configuration*, the user can also access SAP Biller Direct (the billing portal) to review and collect invoices, and update billing details. *Restricted to Public Sector and Partner-led customers. Invoice users with this role must be assigned the Invoice Configuration Administrator (Restricted) role. A minimum of two users must be assigned, up to a maximum of 5 users. **ⓘ Note** It is advised to keep the list of ASC users updated to enhance security and efficiency. When unassigning the ASC role from a user, it must be unassigned using the same steps the permission was assigned. Deactivating the user (via API or employee import) does not unassign the ASC role automatically.
Budget Administrator	**More Information:** The user assigned this role configures the Fiscal Calendar, Budget Categories, Budget Tracking Fields, Budget Items, and Budget Settings. The Budget Administrator can see the budget amounts as configured in the Budget Items, but not the budget actuals as is shown in the dashboards. Budget Administrators have access to all budget items within an entity. For Budget documentation, refer to the Shared: Budget Setup Guide.
Budget Approver/Manager	**More Information:** The user assigned this role approves invoices, purchase requests, and expense reports and can view budgets in the budget dashboards. The Budget Approver does not have access to the budget configuration information. For Budget documentation, refer to the Shared: Budget Setup Guide.
Budget Owner	The user assigned this role owns the budget and can view budgets in the dashboards. The Budget Owner does not have access to the budget configuration information. **More Information:** For Budget documentation, refer to the Shared: Budget Setup Guide.
Budget Viewer	The user assigned this role views budgets in the dashboards. There can be one or several budget viewers. The Budget Viewer does not have access to the budget configuration information. **More Information:** For Budget documentation, refer to the Shared: Budget Setup Guide.
Central Receiver	The user assigned this role can add, edit, and delete purchase order receipts and receipt images. However, they cannot transmit or process purchase orders or invoices.
Client Managed Capture Verifier	The user assigned this role can verify the output of invoices in the client-managed version of Capture Processing.
Data Retention Administrator	The user is assigned this role views and configures the data retention policy for the company and can hold and purge individual users.
Invoice AP User	The user assigned this role can create, assign, and reassign, and delete invoices. They can also reassign a different policy to an invoice and restore deleted invoices. **Group-aware**: When this role is assigned to a user, one or more groups must also be assigned to the user.

This is custom documentation. For more information, please visit SAP Help Portal.

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Invoice Tab

There are several other roles available on the Invoice tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.

Role	Description
	ⓘ **Note** If vendor groups have been configured through the Vendor Employee Access feature, the Invoice AP User can be assigned to the configured vendor groups. If vendor groups are not configured, the AP user is assigned to the Global group by default.
Invoice Approver	The user assigned this role can to approve invoices within an assigned group.
Invoice Configuration Administrator	**This role is intended to be assigned to and used by SAP Concur internal staff only, with few exceptions.** The user assigned this role can **fully manage** (add, edit, delete): • Invoice group configurations • Policies • Invoice-based forms, fields, and validations • Invoice and authorized approver workflows • Audit rules • Expense types • Account codes and account code hierarchy • Exceptions • Image handling, including scan configurations, invoice imaging, vendor imaging • Email reminders • Company Info • Configuration change log (view only) **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** This role is generally assigned with the Shared Configuration Administrator role.
Invoice Configuration Administrator (Restricted)	The user assigned this role can **fully manage** (add, edit, delete): • Authorized approvers • Audit rules • Account codes • Exceptions • Expense types • Scan configurations • Email reminders

Invoice Tab	
There are several other roles available on the Invoice tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
	• Configuration change log (view only) **Group-aware**: When assigning this role, one or more groups must be selected. ⓘ **Note** This role is generally assigned with the Shared Configuration Administrator (Restricted) role.
Client Managed Capture Verifier	The user assigned this role can verify the output of invoices created through capture processing.
Invoice Payment Manager	A user assigned this role can **fully manage** (add, edit, delete) Invoice Pay functionality. This user can monitor and adjust Invoice Pay batches and invoices scheduled for payment and define the Checking and ACH funding accounts that are used for payment.
Payment Release Manager	Users with this role can access the Release Payments option from the Actions menu on the Monitor Batches page. When the Require Batches to be Released setting is configured for Invoice Pay batches, this role allows Payment Release Managers to manually approve/release Invoice Pay batches in pending release status before payments are sent to payment providers for processing. This role can be assigned to one or more users depending on need. Users with this role must also have the Payment Manager role assigned.
Invoice Image Processor	The user assigned this role can update the status of receipt and invoice images.

Invoice Processor	The user assigned this role:
	
	• Can view and update invoices within Invoice Processor
	
	• Can assign or reassign invoices
	
	• Can restore deleted invoices
	
	• Cannot delete invoices
	
	Group-aware: When assigning this role, one or more groups must be selected.
	
	ⓘ **Note**
	The user should only be assigned one of the Invoice Processor roles. If the user is assigned multiple Invoice Processor roles, the role with the least level of access will be applied. The levels of access, from highest to lowest, are:
	
	    1. Invoice Processor Manager
	
	    2. Invoice Processor
	
	    3. Invoice Processor (Audit)

Invoice Tab	
There are several other roles available on the Invoice tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Invoice Processor (Audit)	The user assigned this role: • Can view invoices within Invoice Processor • Cannot update or delete invoices **Group-aware**: When assigning this role, one or more groups must be selected.
Invoice Processor Manager	The user assigned this role can view, update, and delete invoices within Invoice Processor. **Group-aware**: When assigning this role, one or more groups must be selected.
Invoice Proxy Logon	The user assigned this role can log on to Vendor Invoices and act as a proxy user for other employees within an assigned group. **Group-aware**: When assigning this role, one or more groups must be selected.
Invoice Purchasing User	ⓘ **Note** This role is available **only** to users of Invoice. The user assigned this role **cannot** create and submit invoices but can be granted rights to change form field values to adjust totals, etc. in Invoice Purchase Order.
Invoice Receipt Processor	The user assigned this role: • Can view and update invoices in Invoice Received status within Invoice Processor • Cannot delete invoices **Group-aware**: When assigning this role, one or more groups must be selected.
Invoice Tax Administrator	The user assigned this role can configure and activate the Tax Administration tool.
Invoice User	The user assigned this role can create and submit invoices.
Invoice Vendor Manager	The user assigned this role can work with vendors, including approving new vendors, working with the master list, and mapping vendors. **Group-aware**: When assigning this role, one or more groups must be selected.
Purchase Order Processor	The user assigned this role can process purchase orders in the Purchase Request module. **Group-aware**: When assigning this role, one or more groups must be selected.
Purchase Order Processor (Audit)	The user assigned this role can view purchase orders within the purchase order processor and can view receipts within the purchase order processor. However, they cannot update or delete purchase orders or update or delete receipts. **Group-aware**: When assigning this role, one or more groups must be selected.
Purchase Request Approver	The user assigned this role can approve purchase requests in the Purchase Request module.
Purchase Request Processor	The user assigned this role can process purchase requests in the Purchase Request module. **Group-aware**: When assigning this role, one or more groups must be selected.

Invoice Tab	
There are several other roles available on the Invoice tab that are shared with other SAP Concur products. For a definition of each, refer to the Expense roles.	
Role	**Description**
Purchase Request Processor (Audit)	The user assigned this role can view purchase requests within the purchase request processor but cannot update or delete purchase requests. **Group-aware**: When assigning this role, one or more groups must be selected.
Purchase Request Proxy Logon	The user assigned this role can log on to Purchase Request and act as a proxy user for other employees within an assigned group. **Group-aware**: When assigning this role, one or more groups must be selected.
Purchase Request User	The user assigned this role can create purchase requests in the Purchase Request module.
Receipt User	The user assigned this role can enter, update, and delete receipt data for their own purchase orders.

Reporting Tab

Reporting Tab	
Role	**Description**
Budget Role for Cognos	The user assigned this role can access the Budget module in the Analysis/Intelligence data model. **Group-aware**: When assigning this role, one or more groups must be selected.
CAS Analyst	**Do not use - this role is retired.**
Cognos Business Author	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels within their assigned groups (as well as any data not group-related) • Are assigned the Business license type, which restricts the features to which they have access • Can: • Run existing reports • Create new reports or modify existing basic reports using the basic tool – Query Studio **Group-aware**: When assigning this role, one or more groups must be selected.
Cognos Consumer	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels within their assigned groups (as well as any data not group-related) • Are assigned the Consumer license type, which further restricts the features to which they have access • Can run existing reports, with read-only access **Group-aware**: When assigning this role, one or more groups must be selected.

Reporting Tab	
Role	**Description**
Cognos Professional Author	The user assigned this role: • Can use Analysis/Intelligence to view data for reports submitted at all hierarchical levels (no group assignment required) • Are assigned the **Professional** license type, which allows access to all features • Can: • Run existing reports • Create new reports or modify existing basic reports using the basic tool – Query Studio • Create new reports or modify existing basic reports using the advanced tool – Report Studio • Schedule automatic report run **Group-aware**: When assigning this role, one or more groups must be selected.
Consolidation Configuration Administrator	This role is used by companies using the Reporting Database that wish to consolidate the data from the current version and previous versions. The user assigned this role: • Maps expense types and custom fields to a single consolidated definition • Can adjust other consolidation settings ⓘ **Note** This role does **not** include access to Analysis/Intelligence.
Dashboard User	**Retired – do not use**