

Concur User Profile Maintenance Template

Use this template to:

- Add and update approvers for Request and for Expense
- Add new users to your department User Group
- Inactivate user profiles OR remove from User Group
- Assign Delegates to user profiles

General

Columns which Require Input of Data:

To update Concur User Group, complete the following fields:	Column	Value
1. User Group	A	
2. User First Name	C	
3. User Last Name	E	
4. User ID (95#)	G	
5. Login ID (DuckID)	H	
6. Email address	I	
7. Locale	J	en_US
8. Country of Residence	K	United States
9: Ledger	M	Banner
10. Reimbursement Currency	N	USD
11. Is Active	W	Y=Yes, N=No

- If your department does not have a User Group, please select UO from drop down list in Column A in the template
- Columns J, K, M, N, require a static value, see list above. Copy and paste indicated value to all user entries on the template
- Column W=Entry of Y will activate the user profile, entry of N will inactivate the profile and the user profile

Assigning Approvers for Request and for Expense

- Request and Expense Approvers are assigned separately and can be different
- One Request Approver must be assigned, you can assign two Request Approvers (When assigning two Request Approvers, the Request will always route to these two Approvers)
- One Expense Approver must be assigned, you can assign two Expense Approvers (When assigning two Expense Report Approvers, the Expense Report will always route to these two Approvers)
- **To assign Request and Expense Approvers, the Approvers' 95#'s are required**
- Enter the Approver's 95# in the following columns in the template

Field	Column
12. TMC (Travel Agency)	R
13. Request Approver #1 Employee 95# (required)	AL
14. Request Approver #2 Employee 95# (optional)	AM
15. Expense Approver #1 Employee 95# (required)	AN
16. Expense Approver #2 Employee 95# (optional)	AO
17. Rule Class (Travel Agency)	BZ

Assign UO Contracted Travel Agency (required for purchase of airfare)

- In Column R and BZ select either Premier Travel or Direct Travel from drop down menu in those columns
- DO NOT select DT Exception or PT Exception unless the user has an existing ADA accommodation on file

Add new users to your department User Group

- Select User Group from drop down list (specific naming convention for successful upload of data into Concur)
- You can add a user profile to the User Group at the same time the Request and Expense Approvers are assigned

To inactivate an employee's profile when they have left UO

- Fill in all required columns with data
- In Column W indicate N to inactivate

Change User Group Assignment (employee moves to another department on campus)

- Best business practices would be to have new department onboard new employee and update User Group and Request and Expense Approvers
- Select new User Group from drop down menu in Column A
- If new User Group is unknown, the user can be moved to UO group

Assign Delegates to user profiles

- **See template, select Delegate Template (second tab)**
- **Values in Columns A and D are static, copy and paste for each row entered**
- **Column B, enter 95# for the employee/user profile being assigned a Delegate**
- **Column C, enter 95# for the Delegate (person who will work on another user's behalf)**