

Instructions

Select the Concur administrative role that meets your business needs. Submit a signed copy of this form to the Concur team by submitting a ticket to the Concur help desk.

Employee information

Name:

EIN:

Agency:

Division:

Select role

Refer to pg. 2 of this form for a definition of the Concur administrative roles:

Expense audit processor

Request auditor

Expense processor

Request administrator

Expense proxy logon (2 max)

Request proxy logon (2 max)

Business purpose

Explain why you need access to the role(s) you're requesting below.

Concur administrative roles

CONCUR FUNCTION	Expense audit processor	Request auditor	Expense processor	Request admin.	Expense proxy logon	Request proxy logon
View reimbursement requests and p-card reconciliations	X		X		X	
Edit reimbursement requests and p-card reconciliations			X		X	
Correct workflow errors on reimbursement requests and p-card reconciliations			X		X	
Approve reimbursement requests and p-card reconciliations to correct workflow errors			X		X	
Reopen closed reimbursement requests and p-card reconciliations			X		X	
Send reimbursement requests and p-card reconciliations back to employees			X		X	
Create and submit reimbursement requests and p-card reconciliations					X	
View travel requests		X		X		X
Edit travel requests				X		X
Correct workflow errors on travel requests				X		X
Approve travels requests to correct workflow errors				X		X
Reopen closed travel requests				X		X
Send travel requests back to employees				X		X
Create and submit travel requests						X

Agreement

By signing below, I acknowledge and understand the following:

- I have read and understand Travel policy 10-20: Concur administrative roles. I understand that I can't have roles with conflicting permissions.
- I understand the Concur system and its data are private and confidential in nature and that failure to maintain the confidentiality of the data could result in removal of my access to the system and/or disciplinary action.
- I don't have the ability to create or edit vendor or employee profiles in Vantage Financial or Payroll.
- I will use my access responsibly and only as required (not for convenience or faster reimbursements).

Signature

Date

Approval

I have reviewed and approve the roles the employee is requesting access to. I have ensured there is a business need for the access and that it won't create conflicts of duties.

Supervisor

I will submit this form to the Concur team after all approvers have signed it by submitting a ticket to the Concur help desk.

Name

Signature

Date

Agency executive director

Name

Signature

Date