



**Introduction**

*Travel Manager* is the generic title for anyone who uses SAP Concur for purposes other than to arrange or approve travel. In DTS terms, we’re talking about everyone who has a role other than *Traveler*, *Approver*, or *Delegate*. This Quick Start Guide will help Travel Managers find training to begin learning how to accomplish the tasks assigned to each role.

**SAP Concur Roles**

There are many Travel Manager roles associated with SAP Concur, but only those currently in common use, and their associated tasks, are listed in Table 1. Roles followed by an asterisk are not Travel Managers; they are included here merely for completeness.

Table 1

ROLE <sup>1</sup>	TASKS
Traveler*	Create own travel documents
Approver*	Approve documents for individually assigned Travelers
Delegate*	Work documents for individually assigned Travelers or Approvers
Proxy	Work documents for any Traveler in assigned group, but can’t book travel
Employee Administrator	Create and update user profiles to assign roles, org info, etc.
Request Administrator / Expense Processor	Create and run queries to generate non-Cognos reports; help desk or reporting role, and possibly an ad hoc Approver
Cognos Consumer	Run (not create or modify) Cognos reports
Company Card Admin.	Connect Citi accounts & GTCC transactions to Travelers’ profiles

<sup>1</sup>Many roles can be limited to working with only trip requests (authorizations) or expense reports (vouchers). For example, a **Request Approver** may approve trip requests, while an **Expense Approver** may approve expense reports. Your organization may allow the same person to perform both roles, or may choose to keep those roles separate.



**Note:** Today, personnel at the DTMO and SAP Concur perform administrative tasks that those in the field cannot. As more roles become available to the field and personnel at local organizations receive added responsibilities, we will update this Quick Start Guide to ensure it always helps you find the training designed for the tasks you must perform.



SAP Concur Roles vs. DTS Roles

To help you get started thinking in terms of SAP Concur roles, Table 2 provides a rough, non-inclusive list of SAP Concur roles and tasks they perform at the organization level. This will help you understand how those roles equate to the DTS roles you are already familiar with, but please understand that there are few 1-for-1 equivalencies. Most are rough approximations only. Asterisks denote non-Travel Manager roles.

Table 2

DTS Role →	Traveler	Clerk/NDEA	AO	LDTA	ODTA	FDTA/BDTA	APC/CPM	Help Desk
SAP Concur Role ↓								
Traveler*	X							
Approver*			X					
Delegate*		X <sup>1</sup>	X <sup>1</sup>					
Proxy		X <sup>2</sup>						X
Employee Administrator				X	X			
Request Admin. or Expense Processor			X <sup>3</sup>	X <sup>4</sup>	X <sup>4</sup>	X <sup>4</sup>		X
Cognos Consumer				X <sup>4</sup>	X <sup>4</sup>	X <sup>4</sup>		
Company Card Administrator							X	

<sup>1</sup>Actual DTS role similarity depends on specific permissions given. Delegate Approvers can only serve for up to 180 days per appointment.

<sup>2</sup>Proxies are limited when serving as travel clerks or NDEAs, as they cannot make reservations for Travelers. They cannot approve documents.

<sup>3</sup>Although it is not their primary purpose, Request Administrators and Expense Processors can approve documents, if local or Component business rules allow them to do so.

<sup>4</sup>Request Administrators, Expense Processors, and Cognos Consumers all perform a reporting function, a task performed in DTS by anyone with organization access (e.g., all DTAs).

Please note that there are no budget functions – and therefore no budget-related roles – in SAP Concur. All budget processes (e.g., LOA creation, de-obligation, disbursement, debt management) occur in your servicing financial system. Your Component Coordinator can explain how your financial system handles the financial process for your organization.



**Finding  
Training**

In general, the best places to find training for SAP Concur Travel Managers is on the **SAP Concur Training Toolkit** webpage. The URL for the **Training Toolkit** homepage is <https://www.concurtraining.com>. Once you get there, feel free to navigate through the various pages and take any training pertinent to your assigned roles.

The **Training Toolkit** pages contain much more training material than you’re ever likely to need. While you are welcome to access as many resource you wish, the tables below point you to those most pertinent to specific roles and tasks. We recommend you start with them before you tackle the rest.

If you’re using an online version of this guide, Tables 3 and 4 provide selectable links that open some of the more pertinent guides and videos. If you’re looking at a printed version, you can find the listed resources at the following locations:

- For Traveles & Approvers:
  - <https://www.concurtraining.com/toolkit/en/expense/end-user/ui02>
- For Travel Managers:
  - <https://www.concurtraining.com/toolkit/en/expense/administrator>
  - <https://www.concurtraining.com/toolkit/en/travel/administrator>
  - <https://www.concurtraining.com/toolkit/en/data-insights/analysis>

Table 3

PATH	GUIDE
Shared: Delegate Configuration – Setup Guide <sup>1,2,3</sup>	<a href="#">Guide</a>
Expense: Proxy Logon – User Guide <sup>2</sup>	<a href="#">Guide</a>
Shared: User Administration – User Guide <sup>3</sup>	<a href="#">Guide</a>
Concur Travel: Company Administration – User Guide <sup>3</sup>	<a href="#">Guide</a>
Expense: Exceptions – Setup Guide <sup>4,5</sup>	<a href="#">Guide</a>
Expense: Processor – User Guide <sup>5</sup>	<a href="#">Guide</a>
Concur Travel: Travel Reporting – User Guide <sup>6</sup>	<a href="#">Guide</a>
Pre-Built Standard Reports Catalog <sup>6</sup>	<a href="#">Guide</a>
Expense: Company Card & Company Bill Statement Administrator – User Guide <sup>7</sup>	<a href="#">Guide</a>
<sup>1</sup> Useful for Delegate <sup>2</sup> Useful for Proxy <sup>3</sup> Useful for Employee Administrator <sup>4</sup> Useful for Request Administrator <sup>5</sup> Useful for Expense Processor <sup>6</sup> Useful for Cognos Consumer <sup>7</sup> Useful for Company Card Administrator	



**Note:** In Table 4, each task is individually assigned. In other words, you won't necessarily be able to accomplish every task listed for an assigned role. You only need to take the training associated with the tasks you are able to perform.

Table 4

ROLE	TASK	PATH FOR DOD <sup>1</sup>	VIDEO
Proxy	Work with documents as a Proxy <sup>2</sup>	Profile > Act as user in assigned group (Proxy)	<a href="#">Video</a>
Emp. Admin.	Create and update profiles	Administration > Company > Company Admin > User Administration	<a href="#">Video</a>
	Assign Delegate		<a href="#">Video</a>
	Create or modify Delegate		<a href="#">Video</a>
Req. Admin. Exp. Proc.	Run and format request queries	Requests > Process Requests	<a href="#">Video</a>
	Run and format expense queries	Expense > Process Reports	<a href="#">Video</a>
	Export expense report to Excel <sup>3</sup>		<a href="#">Video</a>
	Choose expense report columns to display <sup>3</sup>		<a href="#">Video</a>
	Choose expense report display preferences <sup>3</sup>		<a href="#">Video</a>
	Open expense reports <sup>3</sup> and view receipts		<a href="#">Video</a>
	Find and approve expense reports <sup>3</sup>		<a href="#">Video</a>
Edit or return expense reports <sup>3</sup>	<a href="#">Video</a>		
Cognos Consumer	Run travel reports	Reporting > Intelligence	<a href="#">Video</a>
Comp. Card Admin.	Manage card accounts	Administration > Company > Tools > Company Card	<a href="#">Video</a>
	Manage card transactions		<a href="#">Video</a>
	View data about GTCC import files		<a href="#">Video</a>
<sup>1</sup> DoD path may differ slightly from path demonstrated in video. <sup>2</sup> Written for Proxy, but Delegate actions are similar. <sup>3</sup> Written for Expense Processor, but Request Administrator actions are similar.			

**Training for Running Reports**

If you are tasked with running reports to track your travel data, in SAP Concur one option for running reports is to use the Cognos business intelligence tool. If you are not familiar with Cognos, you can view training guides, videos, and recorded classes at <https://www.concurtraining.com/toolkit/en/data-insights/intelligence#recorded>.

If you're interested in a reporting deep dive, at the bottom of that page, you can register for a free 3-day training webinar broadcast in English or Spanish, and from various places around the world to accommodate people in different time zones.