



## Travel Tips and Tricks #4: Steps for Travel Managers Transitioning Employees

January 13, 2020

### Overview: Lost and Found and Not Forgotten

DoD employees often transition between activities or agencies, or in SAP Concur parlance, “groups.” To allow Travel Managers (TMs) to transfer the Traveler’s SAP Concur profile between the losing and gaining groups, we created a designated group we refer to as “Lost and Found and not Forgotten” to hold the Travelers’ profiles during this transition between groups. Travelers must coordinate with their TM when transition from one group to another.

### Scenario: Transitioning Traveler from DoD Agency A to Agency B

You are a Travel Manager with a Traveler who is transitioning from DTMO to a new assignment at WHS. This Traveler will need to travel for WHS. This scenario explains what you need to do to facilitate the employee’s transition to their new group.

#### DID YOU KNOW?

*A Traveler can create trip requests in SAP Concur during their transition period; however, they cannot submit those requests until they are assigned to their new group.*



## Losing Group's TM – Update the administrative profile for a Traveler who is transitioning to the new group.

User Impact Notice – (January 13, 2020)

1. When a Traveler contacts you to let you know about their reassignment, you must update their administrative profile in SAP Concur. To open their administrative profile, log onto SAP Concur, and from the home screen, select **Administrative > Company > Company Admin > User Administration**, then search for and select their profile.
2. If the Traveler were leaving the Department of Defense, you would enter an **Account Termination Date** under **General Settings**, but in this case, they are not, so go to step 3.

**General Settings**

CTE Login Name\* (must be suffixed with a valid domain)  
1534676740@gmail.mil

Password\* (Blank to leave unchanged)

Verify Password\*

Title

First Name\* Holly

Middle Name N

Nickname

Last Name\* Howard

Suffix

Account Activation Date  
09/11/2019

Employee ID  
1534676740

Account Termination Date

holly.n.howard.civ@gmail.mil

[Change Picture](#)

3. Under **Expense and Invoice Settings**, change the current value for both the **Employee Group – Level 2** and the **LOA Group** to **Lost and Found and Not Forgotten**.

**Expense and Invoice Settings**

Country of Residence: UNITED STATES

State/Province: Select one

Employee Group - Level 1: (DOD) Department of Defense

Employee Group - Level 2: **Defense Human Resources**

Employee Group - Level 3: (DTMO) Defense Travel Manag

Employee Group - Level 4: Select one

Employee Group - Level 5: Select one

Employee Group - Level 6: Select one

Employee Group - Level 7: Select one

Employee Group - Level 8: Select one

LOA Group: DD14QPT

LOA Label: FY20 DTM DTMO OOD (012)

C/E/O: (C) C - Civilian

Cash Advance Account Code

Branch of Service: NA

Reimbursement Currency: US, Dollar

Ledger: DEFAULT

BI Manager

Default Language: English (United States)

Request Settings: Request Approvers, Request Preferences

**Expense and Invoice Settings**

Country of Residence: UNITED STATES

State/Province: Select one

Employee Group - Level 1: (DOD) Department of Defense

Employee Group - Level 2: **Lost and Found and Not Forg**

Employee Group - Level 3: Select one

Employee Group - Level 4: Select one

Employee Group - Level 5: Select one

Employee Group - Level 6: Select one

Employee Group - Level 7: Select one

Employee Group - Level 8: Select one

LOA Group: DD14QPT

LOA Label: Select one

C/E/O: (CTR) Contractor

Rank/Grade: NA

Branch of Service: NA

Reimbursement Currency: US, Dollar

Ledger: DEFAULT

Cash Advance Account Code

Cash Advance Balance

BI Manager

Default Language: English (United States)



## 4. Clear all information from **Approvers**, **Expense Delegates**, **BI Manager**, and **Request Approvers**.

The screenshot shows the 'Expense and Invoice Settings' form. Red boxes highlight the following fields: 'Approvers', 'Expense Delegates', 'BI Manager', and 'Request Approvers'. Other visible fields include 'Country of Residence' (UNITED STATES), 'Employee Group - Level 1' through 'Level 8', 'LOA Group' (DD14QPT), 'LOA Label' (FY20 DTM DTM OOD (012')), 'C/E/O' ((C) C - Civilian), 'Rank/Grade' (GS-13), 'Branch of Service' (NA), 'Reimbursement Currency' (US, Dollar), 'Ledger' (DEFAULT), 'Cash Advance Account Code', and 'Cash Advance Balance'. The 'Request Settings' section at the bottom right also has a red box around 'Request Approvers'.

**Note:** You have cleared the traveler’s old location assignment in preparation for a new one. Essentially, the traveler will be starting with a clean slate.

## Gaining Group’s TM – Update the Traveler’s administrative profile with new information for their new group

1. Find and open the Travelers administrative profile as described in step 1 above.
2. Under **Expense and Invoice Settings**, change the value for both the **Employee Group – Level 2** and the **LOA Group** to reflect the new assigned agency (i.e., **WHS**) and ensure the lowest level for hierarchy is reflected any other **Employee Group Levels**, as needed.

The screenshot shows the 'Expense and Invoice Settings' form. Red boxes highlight the following fields: 'Employee Group - Level 2' (DHRA) Defense Human Res, 'Employee Group - Level 3' (DTMO) Defense Travel Manag, and 'LOA Group' (DD14QPT). Other visible fields include 'Country of Residence' (UNITED STATES), 'Employee Group - Level 1' through 'Level 8', 'LOA Label' (FY20 DTM DTM OOD (012')), 'C/E/O' ((C) C - Civilian), 'Rank/Grade' (GS-13), 'Branch of Service' (NA), 'Reimbursement Currency' (US, Dollar), 'Ledger' (DEFAULT), 'Cash Advance Account Code', and 'Cash Advance Balance'. The 'Request Settings' section at the bottom right has 'Request Approvers' and 'Request Preferences'.

3. Update the information for **LOA Label** (if desired), plus the **Approvers**, **Expense Delegates**, **BI Manager**, and **Request Approvers**.

The screenshot shows the 'Expense and Invoice Settings' form. Red boxes highlight the following fields: 'Approvers', 'Expense Delegates', 'Employee Group - Level 3' (DTMO) Defense Travel Manag, 'BI Manager', and 'Request Approvers'. Other visible fields include 'Country of Residence' (UNITED STATES), 'Employee Group - Level 1' through 'Level 8', 'LOA Group' (DD14QPT), 'LOA Label' (FY20 DTM DTM OOD (012')), 'C/E/O' ((C) C - Civilian), 'Rank/Grade' (GS-13), 'Branch of Service' (NA), 'Reimbursement Currency' (US, Dollar), 'Ledger' (DEFAULT), 'Cash Advance Account Code', and 'Cash Advance Balance'. The 'Request Settings' section at the bottom right has 'Request Approvers' and 'Request Preferences'.

**Note:** You have successfully re-assigned the traveler to the new agency.