University of Maryland, Baltimore Concur Travel & Expense System Role Validation Instructions

Purpose: Instructions for accessing the Concur Travel & Expense System Role Validation report and DocuSign to complete the role validation process. **Note:** to run this report you must hold the Consumer Role. If unsure who has this role in your department, please reach out for assistance to <u>rolevalidation@umaryland.edu</u>.

1. Sign into myUMB and select:



2. Navigate into Reporting > Intelligence:

SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting -	App Center
					Travel Reports	
UNIVERSITY@MARYLAND BALTIMORE			Intelligence			
						New

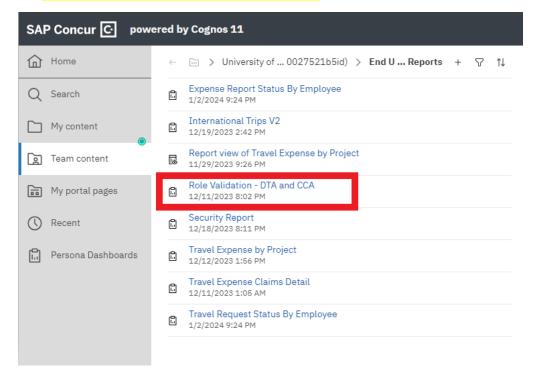
3. Navigate to Team Content > University of Maryland, Baltimore:

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ඛ	Home		Team content + ♡ ↑↓			
Q	Search	-	Concur Data Warehouse 12/5/2023 8:38 PM			
	My content		Dashboard Metrics 7/29/2014 7:32 PM			
	Team content		Intelligence - Standard Reports 9/8/2022 2:05 AM			
	My portal pages		University of Maryland, (p0027521b5id) 4/10/2023 6:07 PM			
()	C Recent					
D	Persona Dashboards					

4. Navigate to End User Reports:

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Home	\leftarrow $~~$ \boxdot > University of Maryland, Baltimore (p0027521b5id) + $~~$ $\uparrow\downarrow$							
Q Search	Admin Office Reports 6/13/2023 6:49 PM							
My content	Consultative Intelligence							
Team content	End User Reports 7/13/2023 2:26 PM							
My portal pages								
C Recent								
Persona Dashboards								

5. Navigate to Role Validation – DTA and CCA:



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\bigcirc	Select all Deselect all

- 7. Results will include the prompts you entered, users and their security roles and certification statement for the School, Department(s), or Org(s) you entered and signature lines. You will complete this certification using DocuSign. (instructions starting with step 11 below)
- 8. Validate that everyone is still a valid employee and has the appropriate roles for their job duties. If any changes need to be made, submit a <u>Concur Form</u>. Updates may take up to two business days. After the role updates are made, run the same report again to get a final version that will be signed and sent to <u>rolevalidation@umaryland.edu</u>.

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Q	Note: Some orgs listed are not tied to an employee ho		iversity of Maryland, Baltimore Center and Department Travel Admin Approvers (DTA) field is blank. You may see two DTA's listed for a single org (this serves as a backup since the DTA cannot approve their own
	requests/expense reports). Org Cost Center Approver Def	🔤 Run Excel	
	06204000 Mukherjee, Chiradeep Si	🔤 Run Excel data	
	I validate that the individuals that are assi Name:	ଞ୍ଚ Run CSV	he appropriate staff person(s) to perform the duties.
0	Signature:	🔍 Run XML	
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9. Click on the arrow next to the play button and select Run PDF:

10. Once you have validated the final version of the User Security Roles PDF report, select the printer icon in the top right corner and choose the Destination "Save as PDF" then click Save to name the file and save it in a folder of your choosing.

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Print		14 pages		
Destination	Save as PDF	•		
Pages	All	•		
Pages per sheet	1	Ŧ	Save	Cancel

- 11. Access DocuSign (<u>DocuSign</u>) and send the completed and signed Concur Travel & Expense System Role Validation report to the role validation email box <u>rolevalidation@umaryland.edu</u>. CMAS will monitor this box and follow-up with the sender if there are any questions.
- 12. If you are not already set up as a DocuSign Sender, request the Sender role using the <u>DocuSign Security Change</u> <u>Request form</u> before you continue. It may take one business day to process so please plan accordingly. Training is not required before the role request is granted, but it is suggested. Training information is available at <u>www.umaryland.edu/docusign</u>. For additional assistance with the DocuSign process, view this <u>video</u>. You can also contact CMAS using <u>rolevalidation@umaryland.edu</u>.