

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

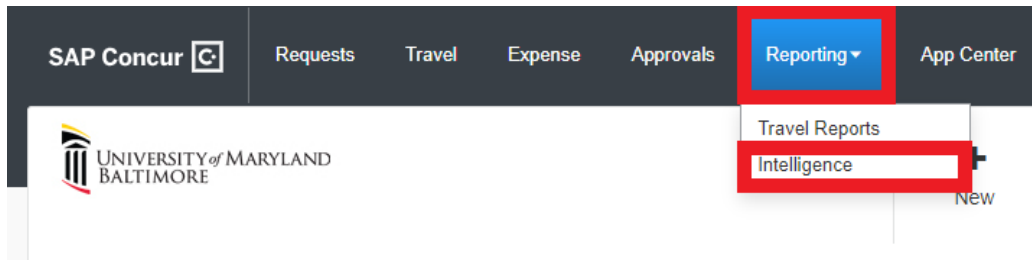
Purpose: Instructions for accessing the Concur Travel & Expense System Role Validation report and DocuSign to complete the role validation process. **Note:** to run this report you must hold the Consumer Role. If unsure who has this role in your department, please reach out for assistance to [rolevalidation@umaryland.edu](mailto:rolevalidation@umaryland.edu).

1. Sign into myUMB and select:

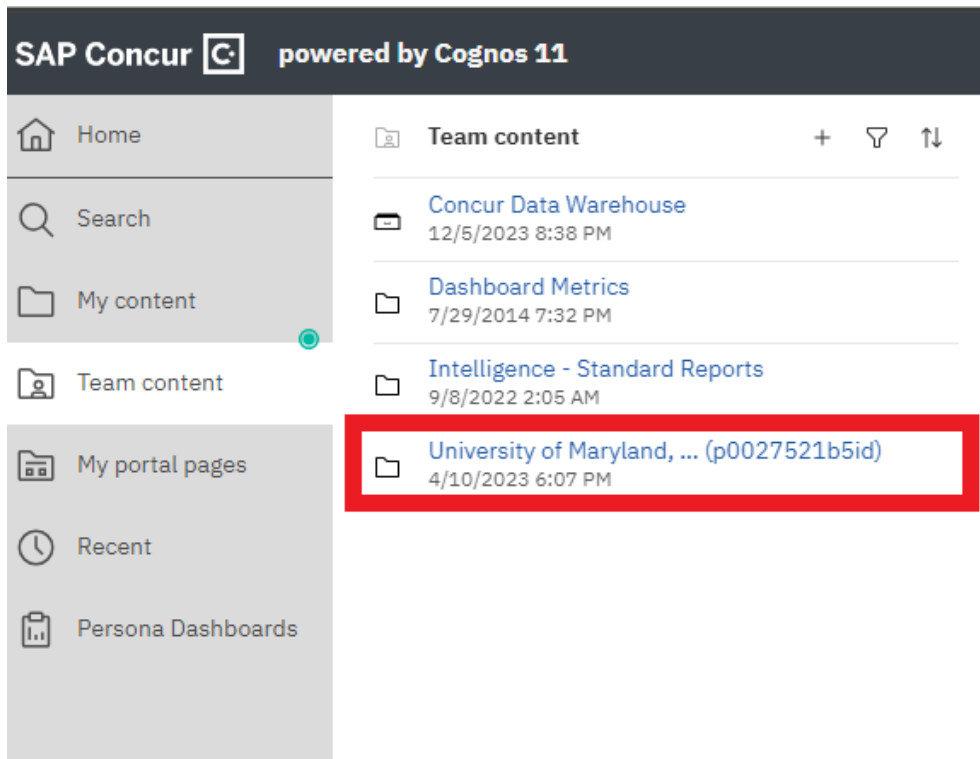


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Expense

2. Navigate into Reporting > Intelligence:

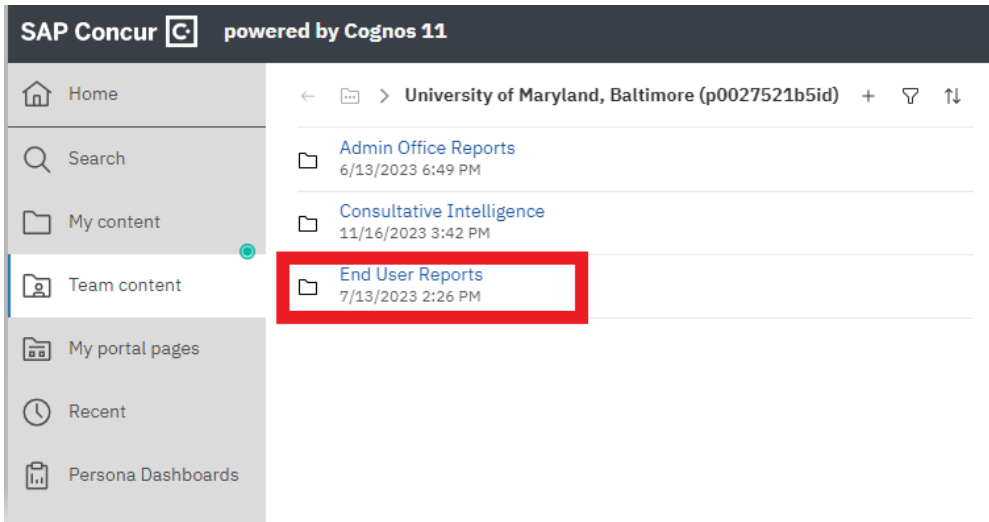


3. Navigate to Team Content > University of Maryland, Baltimore:

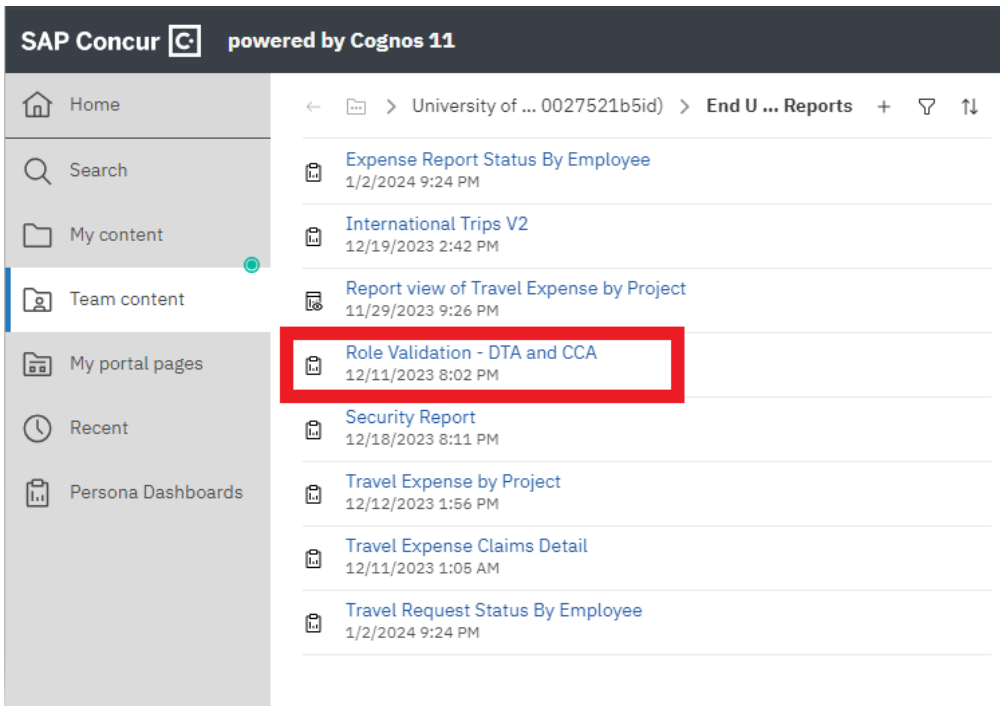


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4. Navigate to End User Reports:

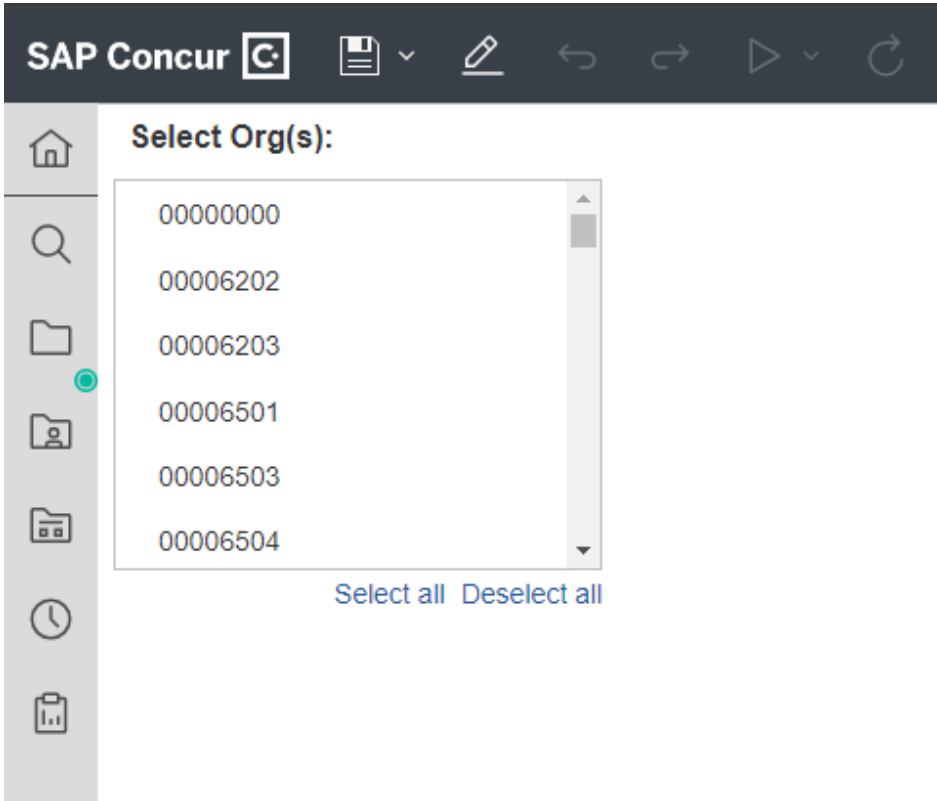


5. Navigate to Role Validation – DTA and CCA:

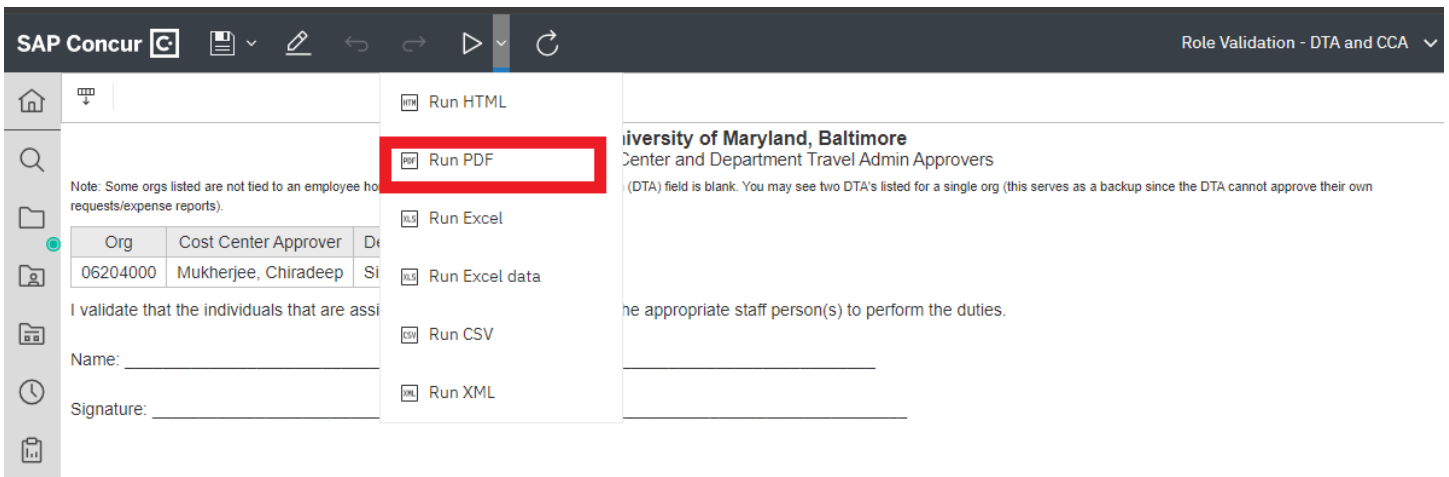


6. Select the Org(s) for your Department and click Finish:

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- 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)
- 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 [Concur Form](#). 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 [rolevalidation@umaryland.edu](mailto:rolevalidation@umaryland.edu).
- Click on the arrow next to the play button and select Run PDF:



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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.



Print

14 pages

Destination

Save as PDF

Pages

All

Pages per sheet

1

Save

Cancel

11. Access DocuSign ([DocuSign](#)) and send the completed and signed Concur Travel & Expense System Role Validation report to the role validation email box [rolevalidation@umaryland.edu](mailto:rolevalidation@umaryland.edu). 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 [DocuSign Security Change Request form](#) 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 [www.umaryland.edu/docusign](http://www.umaryland.edu/docusign). For additional assistance with the DocuSign process, view this [video](#). You can also contact CMAS using [rolevalidation@umaryland.edu](mailto:rolevalidation@umaryland.edu).