Reset Form

Print

Revised 04/2024

THE TEXAS A&M UNIVERSITY SYSTEM

Concur Privileged Access Request Form

USER INFORMATION

This form is used to assign privileged roles in the Concur System. It totally replaces any access previously granted.

Employee Name: _____ ❑ ADD ❑ CHANGE ❑ REMOVE

Employee E-mail: _____ **Employee UIN:** _____

Employee Phone: _____ **Home Campus Code:** Select CC **Home Dept/Sub-Dept:** _____

MEMBER ACCESS

Select all members being requested

❍ 01 – TAMUS	❍ 02 – TAMU	❍ 04 – TSU	❍ 05 – PVAMU	❍ 06 – AL-RSCH	❍ 07 – AL-EXT
❍ 10 – TAMUG	❍ 11 – TAMFS	❍ 12 – TTI	❍ 15 – TAMUCC	❍ 16 – TAMIU	❍ 17 – TAMUK
❍ 20 – TVMDL	❍ 21 – TAMUC	❍ 22 – TAMUT	❍ 23 – HSC	❍ 24 – TAMUCT	❍ 25 – TAMUSA
❍ 26 – TSSC	❍ 28 – TEES	❍ 30 – TDEM	❍ 99 – TAMRF	❍ All Members (Limited)	

Users should select only one of the models detailed below. Many of the roles are hierarchical. For example, the Member Administrator model includes all of the roles in the Travel and P-Card Staff model, plus additional access, therefore a user with the Member Administrator model would not need the Travel or P-Card staff model.

MEMBER ADMINISTRATOR

❍ *Users selecting this model should be functioning as a Member Concur Administrator. This model will assign the following roles to the user.*

Expense Roles:

- Attendee Admin (Read Only)
- Employee Administrator
- Expense Cash Advance Admin
- Expense Company Card Admin
- Expense Processor Manager
- Expense Proxy Logon

Travel Roles:

- All roles assigned by assigning user to the Travel Administrators Group under User Administration

Travel Request Roles:

- Request Admin
- Request Proxy Logon

TRAVEL STAFF

❍ *Users selecting this model should be functioning as Travel Staff. This model will assign the following roles to the user.*

Expense Roles:

- Attendee Admin (Read Only)
- Employee Admin (Read only)
- Expense Proxy Logon

Travel Roles:

- Administer Approval Queue
- Report User
- User Administration (Read Only)

Travel Request Roles:

- Request Proxy Logon

For Expense Processor, Travel Staff should choose one of these options: Choose one from this list:

For Request Processor, Travel Staff should choose one of these options: Choose one from this list:

The following roles are considered restricted, but may be added to Travel Staff as necessary. The additon of these roles must by specifically requested; the default action is 'No'.

Expense Roles:

- Employee Administrator — No
- Exp Cash Advance Admin — No
- Exp Company Card Admin — No

Travel Roles:

- Manifest Administrator — No
- Self-Assigning Assistant — No

Travel Request Roles:

No roles available

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Name: **UIN:**

P-CARD STAFF

Users selecting this model should be functioning as P-Card Staff (no Travel Request access needed). This model will assign the following roles to the user.

Expense Roles:	Travel Roles:	Travel Request Roles:
• Attendee Admin (Read Only) • Employee Admin (Read only) • Expense Proxy Logon	• Administer Approval Queue • Report User • User Administration (Read Only)	*No roles available*

For Expense Processor, P-Card Staff should choose one of these options: Choose one from this list:

The following roles are considered restricted, but may be added to P-Card Staff as necessary. The additon of these roles must by specifically requested; the default action is 'No'.

Expense Roles:		Travel Roles:		Travel Request Roles:
• Employee Administrator	No	• Manifest Administrator	No	*No roles available*
• Exp Company Card Admin	No	• Self-Assigning Assistant	No	

HELP/SUPPORT STAFF

Users selecting this model should be functioning as Help Staff, supporting Concur users. This model will assign the following roles to the user.

Expense Roles:	Travel Roles:	Travel Request Roles:
• Attendee Admin (Read Only) • Employee Admin (Read only) • Expense Processor (Audit) *(Inquiry only role)* • Expense Proxy Logon	• Report User • User Administration (Read Only)	• Request Proxy Logon

The following roles are considered restricted, but may be added to Help/Support Staff as necessary. The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:	Travel Roles:		Travel Request Roles:	
No roles available	• Self-Assigning Assistant	No	• Request Auditor *(Inquiry only role)*	No

REPORT WRITER

Users selecting this model should be functioning as a Report Writer. This model will assign the following roles to the user.

Expense Roles:	Travel Roles:	Travel Request Roles:
• Attendee Admin (Read Only) • Employee Admin (Read only) • Expense Processor (Audit) *(Inquiry only role)* • Expense Proxy Logon • Integration Admin (Restricted)	• Report User • User Administration (Read Only)	• Request Proxy Logon • Request Auditor (Inquiry only role)

The following roles are considered restricted, but may be added to Central Administrators as necessary The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:		Travel Roles:		Travel Request Roles:
• Employee Administrator	No	• Self-assigning Assistant	No	*No roles available*

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Name: **UIN:**

FAMIS IT STAFF

Users selecting this model should be functioning as FAMIS IT Staff. This model will assign the following roles to the user.

Expense Roles:

- Attendee Admin (Read Only)
- Employee Admin (Read only)
- Expense Processor (Audit) *(Inquiry only role)*
- Expense Proxy Logon

Travel Roles:

- Report User
- User Administration (Read Only)

Travel Request Roles:

- Request Proxy Logon

The following roles are considered restricted, but may be added to FAMIS IT Staff as necessary. The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:

- Employee Administrator No
- Expense Config Admin (Res) No
- Integration Admin (Res) No
- Shared Config Admin (Res) No
- Web Services Admin No

Travel Roles:

- Company Admin No
- Custom Field Administrator No
- Import Data Administrator No
- Organization Unit Admin No
- Self-Assigning Assistant No

Travel Request Roles:

- Request Auditor *(Inquiry only role)* No

CENTRAL ADMINISTRATOR

Users selecting this model should be functioning as a Central Administrator. This model will assign the following roles to the user.

Expense Roles:

- Attendee Admin
- Employee Administrator
- Expense Cash Advance Admin
- Expense Company Card Admin
- Expense Config Admin
- Expense Processor Manager
- Expense Proxy Logon
- Shared Config Admin (Restricted)

Travel Roles:

- Administer Approval Queue
- Billing Administrator
- Company Admin
- Company Discount Administrator
- Company Link Administrator
- Company Locations Administrator
- Company Ghost Card Administrator
- Custom Field Administrator
- Import Data Administrator
- Manifest Administrator
- Organization Unit Administrator
- Report Admin
- Report User
- Self-assigning Assistant
- Travel Policy Administrator

Travel Request Roles:

- Request Proxy Logon
- Request Admin
- Company Info Administrator

The following roles are considered restricted, but may be added to Central Administrators as necessary. The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:

- E-mail Reminders – Workflow Admin No
- Expense Type Administrator No

Travel Roles:

No roles available

Travel Request Roles:

No roles available

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Name: **UIN:**

CENTRAL SECURITY

Users selecting this model should be functioning as a Central Security Administrator. This model will assign the following roles to the user.

Expense Roles:	Travel Roles:	Travel Request Roles:
• Attendee Admin • Company Info Admin • Employee Administrator • Expense Cash Advance Admin • Expense Config Admin • Expense Proxy Logon • Role Admininstrator	• Administer Approval Queue • Company Admin • Company Link Administrator • Custom Field Administrator • Group and Shared Resource Administration • Import Data Administrator • Organization Unit Administrator • Permission Admin • Report Admin • Report User • User Administration	• Request Proxy Logon • Company Info Administrator

The following roles are considered restricted, but may be added to Central Security as necessary. The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:		Travel Roles:	Travel Request Roles:	
• Expense Processor (Audit) *(Inquiry only role)*	No	*No roles available*	• Request Auditor (Inquiry only role)	No

MEMBER SECURITY

Users selecting this model should be functioning as a Member Security Administrator. This model will assign the following roles to the user.

Expense Roles:	Travel Roles:	Travel Request Roles:
• Attendee Admin (Read only) • Employee Administrator • Expense Proxy Logon • Role Admininstrator	• Administer Approval Queue • Permission Admin • Report Admin • Report User	• Request Proxy Logon

The following roles are considered restricted, but may be added to Member Security as necessary. The additon of these roles must by specifically requested; the default action is 'No':

Expense Roles:		Travel Roles:	Travel Request Roles:	
• Expense Processor (Audit) *(Inquiry only role)*	No	*No roles available*	• Request Auditor (Inquiry only role)	No

COMMENTS

Please add any additional comments regarding your access

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Name: **UIN:**

Mentor Information

Required for gaining entry access to eTravel/Concur prior to formal training. As the mentor, I will provide training and assistance for the user. I have reviewed mentor policies and security http://finance.tamu.edu/fmo/ts/docs/mentor.asp and agree to abide by them

Mentor Name	Mentor Signature	Mentor E-Mail
		Phone Number

STATEMENT OF RESPONSIBILITY

I understand that I will be in violation of System regulations, State and Federal law if I gain or help others gain unauthorized access to the systems above. I acknowledge that neither I nor anyone else possess the authority to allow anyone to use my ID or password. I understand that if I violate System regulations and State and Federal laws by gaining or helping others gain unauthorized access, I will be subject to disciplinary action and criminal prosecution to the full extent of the law. (Chapter 33, Title 7 of the Texas Penal Code). I accept the responsibility of keeping the reports and information confidential. I understand, accept and will complete training related to the software provided to me by Texas A&M System Members. Misuse or abuse of this responsibility as User/Supervisor may be just cause for revocation of software access and disciplinary action. I agree further not to attempt to circumvent the computer security system by using or attempting to use any transactions, software, files or resources I am not authorized to use.

User Printed Name **Signature** **Date**

Approved: *Request must be approved by a Member FAMIS Security Administrator. Please select one of the Security Administrators for your Member from the list below and email your signed form to them. If access is approved, they will forward on to FAMIS Services.*

*Select the security contact for the member access is being requested

FAMIS Security Administrator **Date**

Security Administrators

Please scan and email approved form to:
FAMIS-Security@tamus.edu

Please include **'Concur Access'** in the subject lline of the email, along with the user's

name. If there are any questions, please call the FAMIS Help Line, (979) 458-6464.

Concur Privileged Access Request Form

Name: **UIN:**

Instructions and Access Type Descriptions

This form is for use by Texas A&M University System Members requesting privileged access to the Concur System.

All employees of Concur Participating agencies will automatically receive the following standard access:

- Request Approver
- Request User
- Cliqbook User
- Expense Approver
- Expense User
- Travel and Expense User
- Guest Booking

FAMIS Security Administrators, as a function of their security responsibilities, will be assigned the following privileged access by FAMIS Services Security Administrators:

- Employee Maintenance
- Expense Processor Audit
- Expense Proxy Logon
- Administer Approval Queue
- Permission Admin
- Report Admin
- Report User
- Role Maintenance

FAMIS Central Security Administrators (FAMIS Services Security Staff), as a function of their security responsibilities, will be given FAMIS Security Administrator privileges and other administrative privileged access including:

- Employee Admin

If additional privileges are needed, this form must be completed, signed, and submitted to your FAMIS Security Administrator.

Please Note: This form replaces all previous Concur privileged access.
You must complete this form with all desired access.

Actions:

- **Remove Privileged Access** – the employee is leaving your department or the A&M System and no longer requires any privileged access.
- **Change Privileged Access** – the employee's access requirements have changed.

Mentor Program: In order to gain administrative access to the update or entry functions, you must have a mentor who agrees and is able to act in an advisory capacity so that you can begin work prior to completion of all formal training. At no time should you share your password with your mentor or mentee and at no time should you or your mentor use each other's workstation or financial system accesses.

Important notes: You must send a completed, signed original of this form to your FAMIS Security Administrator. Individuals whose employment has not been fully processed or who are not available for computer resource allocation will experience a delay in receiving privileged access.