



Concur Government Edition (CGE) Job Aid: Moving a User from One Organization to Another

Purpose: To provide a step-by-step guide to moving a User from one Organization to another. This could be for the purpose of traveling on behalf of another Organization or for a permanent change of employment.

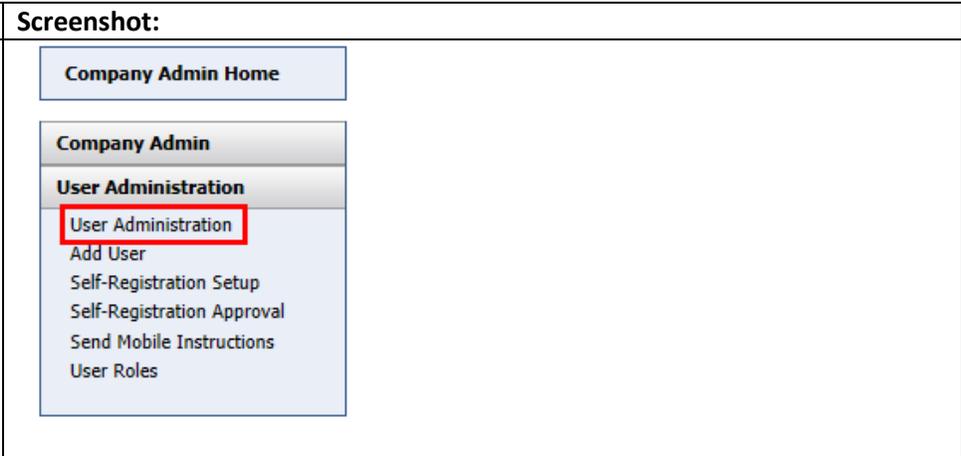
Audience: FATAs

Note: This process was previously known as “detach and receive” in ETS1. This process can also be performed by the DHHS Help Desk.

<p>Instruction:</p> <p>Step 1: Log into AMS Log into CGE via AMS using either your PIV card or your network username and password.</p> <p>Note: AMS can be accessed through the HHS intranet or the internet at https://ams.hhs.gov</p>	<p>Screenshot:</p> 
<p>Step 2: Select CGE From the Home page of AMS select the E-Travel link.</p>	
<p>Step 3: Select Administration Tab From the Home page of CGE, select the Administration tab.</p>	

Instruction:

Step 4: Select User Administration
 From the navigation menu on the left, select User Administration.

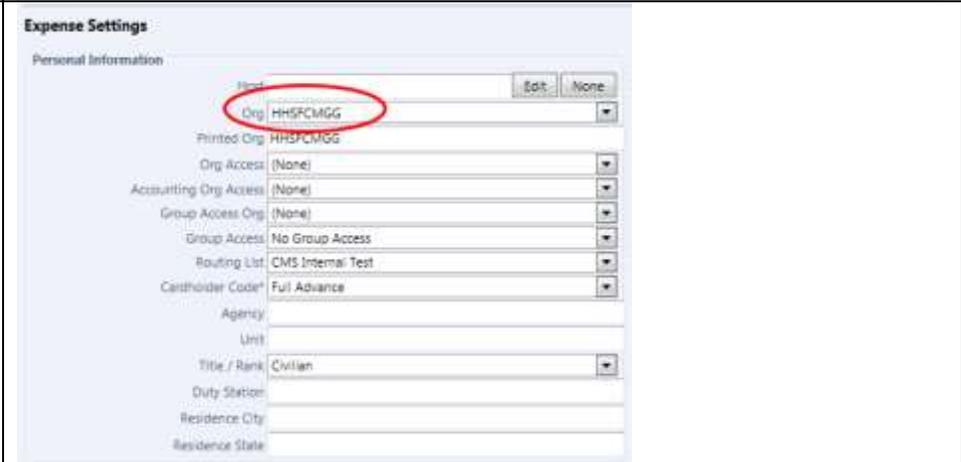


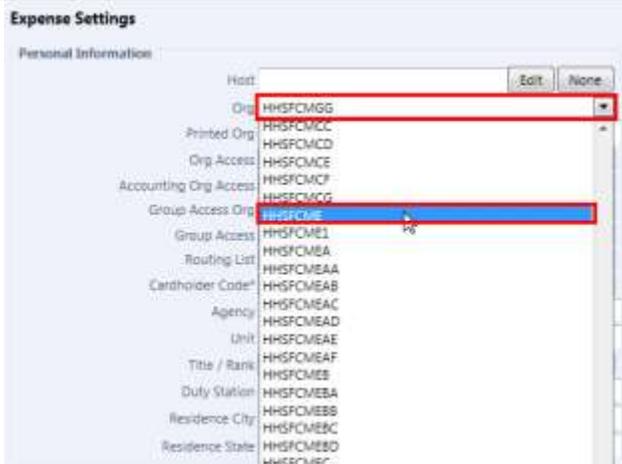
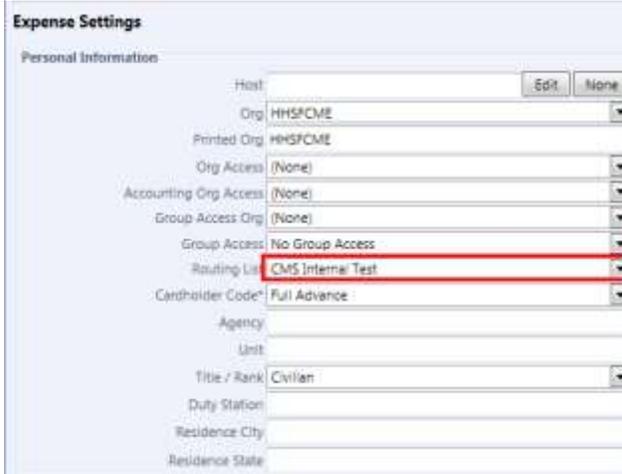
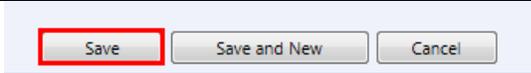
Step 5: Search for User
 Enter either the First Name, Last Name, or Email address of the Traveler in the Search Text field and then select the Search button. Select the name of the Traveler in the list that is displayed below.

Note: To access the profile, you must have access to the Group to which the User is a member.



Step 6: Locate Organization
 Scroll to the Expense Settings section and identify the current Organization for the User. As a FATA you can move this User to any Org or Sub Org to which you have access. If you do not have access to the new Org, contact the Help Desk to assist with this process.



<p>Instruction:</p>	<p>Screenshot:</p>
<p>Step 7: Select New Organization Select the Org drop down arrow and scroll to the new Org that you would like to assign to this User. Select the new Org to complete.</p>	 <p>The screenshot shows the 'Expense Settings' form with the 'Personal Information' section. The 'Org' dropdown menu is open, displaying a list of organizations. 'HHSFCMGG' is highlighted in blue, indicating it is the selected organization. Other organizations listed include HHSFCMCC, HHSFCMCD, HHSFCMCE, HHSFCMCF, HHSFCMCG, HHSFCME, HHSFCME1, HHSFCMEA, HHSFCMEA, HHSFCMEAB, HHSFCMEAC, HHSFCMEAD, HHSFCMEAE, HHSFCMEAF, HHSFCMEB, HHSFCMEBA, HHSFCMEBB, HHSFCMEBC, HHSFCMEBD, and HHSFCMEC.</p>
<p>Step 8: Update Routing List If needed, select the Routing List drop down arrow and select a Routing List that is part of the new Org.</p>	 <p>The screenshot shows the 'Expense Settings' form with the 'Personal Information' section. The 'Routing List' dropdown menu is open, displaying a list of routing lists. 'CMS Internal Test' is highlighted in blue, indicating it is the selected routing list. Other routing lists listed include 'Full Advice'.</p>
<p>Step 9: Save Scroll to the bottom of the page and select the Save button to complete.</p>	 <p>The screenshot shows the bottom of the 'Expense Settings' form with three buttons: 'Save', 'Save and New', and 'Cancel'. The 'Save' button is highlighted with a red border, indicating it is the button to be selected.</p>

You have successfully moved a User from one Organization to another in CGE!