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Product Version

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Latest Version: 4.1

Topic: 1
Unified Scenario Simulation
Wexcombe Creamery: Company Administration Foundations
Business Context
Company Background
Wexcombe Creamery in Cesena, Italy is a mid-sized dairy business standing up legacy Concur Travel for the first time. Its office manager has been asked to make sure staff can book trips within sensible controls, and a consultant has been engaged to guide the initial administration setup.
Where Things Stand
Today travel is arranged informally by email, so no one agrees on how a request should move, where offices are recorded, or who can see reporting. Leadership wants a tidy foundation before any traveller logs in, rather than fixing things after go-live.
The Team
A small group will administer the site: the office manager as lead administrator, two site coordinators, and a finance reviewer who wants oversight of spend. None of them has used the tool before, so clear reasoning matters more than speed.
Objective
The consultant is asked to advise on the workflow, the way company structure and locations are represented, how reporting and imports are governed, and how custom fields and settings should be scoped, so the administration foundation is sound.
Your assignment
You are the configuration consultant guiding Wexcombe Creamery through its first company administration setup in legacy Concur Travel. For each challenge you weigh the options an administrator faces and recommend the soundest approach, reasoning toward a clean foundation rather than performing the clicks for them
1. CHALLENGE 1 — Framing the Trip Approval Workflow
• Recommend the canonical order in which a trip is booked, approved, and ticketed.
• Advise how pending requests for a group of reviewers should be collected.
• Explain what should happen to queued requests when an approver is away.
• Frame the workflow so it holds for every traveller, not just one team.
Checkpoints
• The recommended order reflects book within policy, then approve, then ticket.
• Pending group requests are pooled in an approval queue rather than one inbox.
• An absent approver's queue is covered by reassignment, not left to stall.
2. CHALLENGE 2 — Structuring Company Locations and Org Units
• Advise how to add a single new office so it is selectable during booking.
• Recommend the efficient way to load many locations at once.
• Identify which construct models the company's internal departmental groupings.
• Explain how bulk loading applies to org units as well as locations.
Checkpoints
• A single office is added through the company locations screen.
• Many locations are loaded with the locations import template.
• Departments are modelled as org units, loaded via their own import template.

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Question: 1

CHALLENGE 1 — Framing the Trip Approval Workflow

The office manager asks in what order a trip should move through the tool. What do you recommend?

A. The traveller books within policy, the request routes for approval, and the trip is ticketed once approved
B. The trip is ticketed first and approval is only sought later if the cost draws a complaint
C. Approval is granted before any trip is booked, so the approver signs off on nothing concrete, which does not actually fit what this requirement calls for
D. Booking and approval happen simultaneously with no defined order between them at all

Answer: A

Explanation:
Booking within policy comes first, approval clears it, and ticketing completes the trip in that order.

Question: 2

CHALLENGE 1 — Framing the Trip Approval Workflow

Requests above a threshold should reach a group of reviewers rather than one person. How should they be collected?

A. In one reviewer's personal email folder so only that individual ever sees them
B. In an approval queue that pools the pending requests for the assigned group
C. In the unused ticket list, which tracks flight credits rather than pending requests
D. In the vendor exclusion list, which suppresses suppliers and holds no requests

Answer: B

Explanation:
An approval queue pools pending requests so any assigned reviewer can pick them up.

Question: 3

CHALLENGE 1 — Framing the Trip Approval Workflow

A reviewer goes on leave with requests still in the queue. What should the administrator do?

A. Delete the pending requests so the queue is clear and travellers resubmit later
B. Leave them waiting until the original approver returns, however long that takes
C. Reassign the queued requests to another available approver

D. Cancel every affected trip because the assigned approver is briefly unavailable

Answer: C

Explanation:
Reassigning moves the pending requests to an available approver so they are not stuck.

Question: 4

CHALLENGE 2 — Structuring Company Locations and Org Units

A new office must appear as a selectable location for one site only. How should it be added?

A. Rename an existing location to the new site, discarding the site others still use
B. Record the site only in one traveller's personal notes field
C. Skip adding it and have travellers type the address manually each time
D. Add the new location individually through the company locations screen

Answer: D

Explanation:
Adding one location on the company locations screen is right for a single site.

Question: 5

CHALLENGE 2 — Structuring Company Locations and Org Units

Roughly two hundred offices must be loaded from a prior system. What is the efficient approach?

A. Populate and upload the company locations import template
B. Add all two hundred one at a time through the single-location screen over days
C. Email the list to travellers and ask each to add their own office
D. Keep the list outside the tool so it is never loaded at all

Answer: A

Explanation:
The locations import template loads many offices at once in one structured upload.
Topic: 2
Micro Skill Drill Exam

Question: 6

Halberd Instruments in Tampere, Finland routes travel requests that exceed a threshold to a group of reviewers rather than a single named person. An administrator is deciding how such pending requests should be collected so any reviewer on duty can pick them up.
What mechanism collects pending requests for a group of reviewers to act on?

A. An approval queue that holds pending requests for the assigned group to work
B. The unused ticket list, which tracks flight credits rather than requests awaiting a decision
C. The vendor exclusion list that suppresses certain suppliers from search results
D. A personal email folder belonging to one reviewer, so only that individual ever sees the pending requests

Answer: A

Explanation:
An approval queue pools pending requests so any assigned reviewer can act on them.

Question: 7

Osterlund Brewing in Aarhus, Denmark has an approver going on leave with several requests sitting in the queue. An administrator must make sure those pending requests are handled without waiting for the absent approver to return.
What should the administrator do so the pending requests are still actioned?

A. Cancel every affected trip outright because the assigned approver is temporarily unavailable to review them
B. Leave the requests waiting until the original approver comes back from leave, however long that takes
C. Reassign the queued requests to another available approver
D. Delete the pending requests so the queue is empty and the travellers simply submit them again later

Answer: C

Explanation:
Reassigning moves the pending requests to an available approver so they are not stuck.

Question: 8

Marchetti Ceramics in Faenza, Italy has a new administrator who needs to reach the central page where company-level travel administration features are grouped. A colleague mentions everything from locations to custom fields is launched from one place.
Where does the administrator go to reach the grouped company-level administration features?

A. The individual traveller profile page belonging to one employee
B. The traveller booking wizard that end users open to search flights and hotels for a trip
C. An external spreadsheet kept outside the tool that lists which features exist somewhere in the product

D. The company administration page, which gathers the company-level administration tools in one place

Answer: D

Explanation:
The company administration page is the central hub from which the company-level tools are launched.

Question: 9

Pentworth Millworks in Limerick, Ireland is opening a new site and needs it to appear as a selectable office when users set up their profiles. An administrator wants to add just this one site accurately without touching the others.
How should the administrator add the single new site?

A. Rename an existing location to the new site, which loses the original site that other users still rely on
B. Skip adding it and ask users to type the address manually every time they book
C. Add the site only as free text inside one traveller's personal notes field
D. Add the new location individually through the company locations screen

Answer: D

Explanation:
Adding one location through the company locations screen is the right approach for a single site.

Question: 10

Kolstrup Dairy in Odense, Denmark is documenting how its organisation is represented in the travel tool. An analyst is unsure what the company structure actually models and why it matters before locations and users are set up.
What does the company structure in the tool primarily represent?

A. The hierarchy of the organisation that later settings, users, and rules are attached to
B. Only the list of airline vendors the company has negotiated fares with
C. A record of every individual trip that has already been booked and ticketed by travellers
D. The physical office furniture inventory maintained for each site

Answer: A

Explanation:
Company structure models the organisational hierarchy that locations, users, and policy are then arranged against.

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