



SAP Concur 



CONCUR 101



INTRODUCTION

- This training will cover domestic travel using state funds. International travel in Concur will be available in the next implementation phase.
- Once you have completed this training session, please use Concur as your primary domestic travel system going forward.

TRAINING RESOURCES

- **Materials** for today's training include *Definition Sheet, FAQ, Travel Checklists (2)*
- Visit One-Stop's **Concur Travel** resource center for the latest updates and access to comprehensive training materials including video demos and PDF guides.
 - <https://www.calstatela.edu/finance-onestop/concur-travel>
- Have additional questions? Contact the One-Stop Financial Services travel team at:
 - (323) 343-5430, travel@calstatela.edu
 - <https://www.calstatela.edu/finance-onestop/travel>

CONCUR OVERVIEW

■ What is Concur?

- *Concur is a comprehensive web-based tool that integrates travel request and expense reporting with a complete travel booking solution for CSU travel.*
- *Concur also offers the SAP Concur Mobile App to manage your expenses and business travel on your mobile device and/or tablet.*
- *All CSU campuses are transitioning to Concur to streamline paperwork for travel, shorten approval/review times, and improve audit/payment cycles.*

■ What is Concur replacing?

- *Instead of submitting an RFT, you will be submitting a **Concur Travel Request**.*
- *Instead of submitting a TEC, you will be submitting a **Concur Expense Report**.*

■ Who can use Concur?

- *Employees (staff and faculty) who have been trained and onboarded to Concur.*

HIGHLIGHTED BENEFITS



Streamlined travel and expense experience, including convenient booking options directly within Concur



Improved visibility of travel expense and approval status



Easier receipt capture and documentation by upload/scan to expense report; mobile app upload option



Email notifications and reminders of submissions and approvals

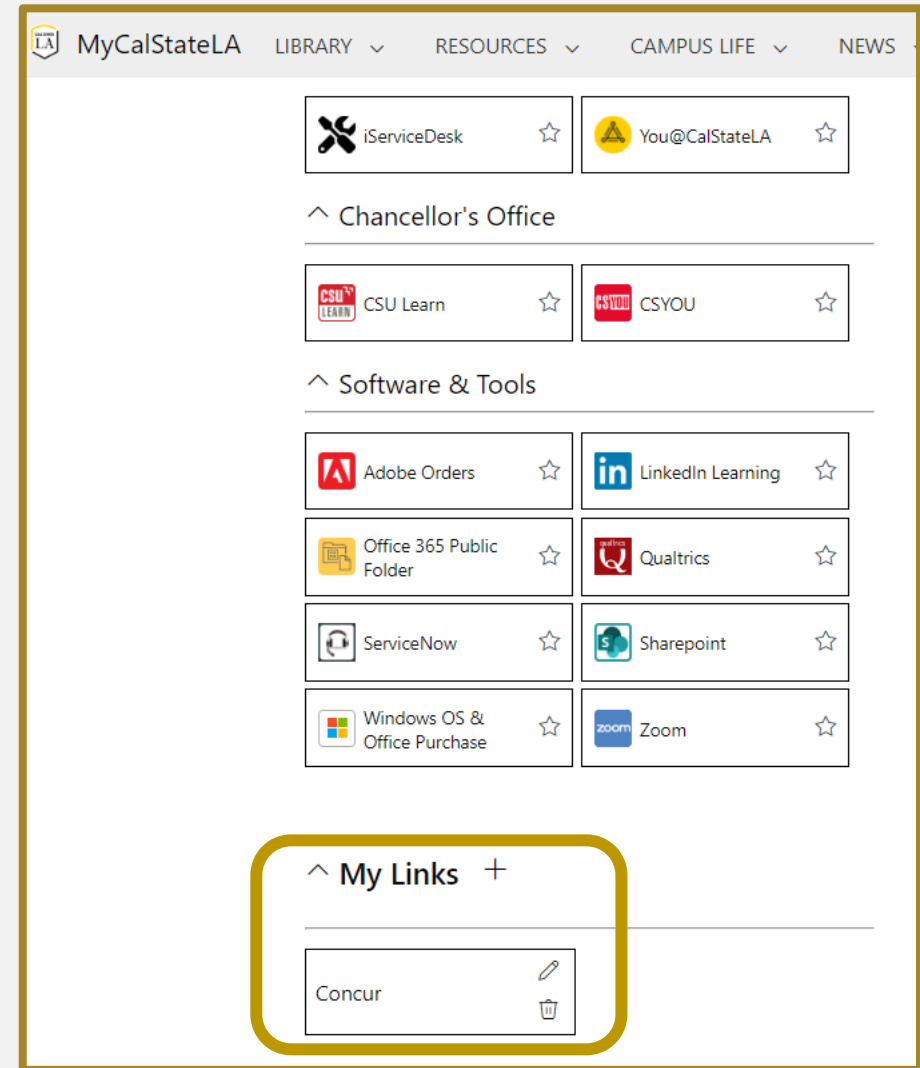


Convenience through built-in automated features for travel policy compliance, CSU and campus specific policies, mileage calculation, currency conversion, etc.



LOGGING IN TO CONCUR

- Go to calstatela.edu > click on **MyCalStateLA** > login with your credentials
- Concur link:
<https://ds.calstate.edu/compatible.aspx?svc=concur>



NAVIGATING CONCUR HOMEPAGE

Use Trip Search to gather estimates for your Travel Request.

Once your Travel Request is approved, use to book travel reservations

View of queued items

SAP Concur | Requests | Travel | Expense | App Center | Help

CSU The California State University
Hello LA Traveler

Quick Task Bar: + New | 12 Authorization Requests | 00 Available Expenses | 22 Open Reports

TRIP SEARCH

Mixed Flight/Train Search
Round Trip | One Way | Multi City
From: Departure city, airport or train station
To: Arrival city, airport or train station
Search | Show More

ALERTS
As a CSU Office of the Chancellor employee, you are eligible for a free Triplt Pro subscription. [Learn More and Activate](#) | Not right now

COMPANY NOTES

MY TASKS

12 Open Requests

- 07/17 Denver Conference \$495.00 — Travel
- 07/01 Blanket Request- July \$109.00 — Travel
- 06/28 Test Validation #3 \$418.18 — Travel
- 06/19 alaska trip \$20.00 — Travel
- 06/12 international test 070218 \$200.00 — Travel

00 Available Expenses
You currently have no available expenses.

22 Open Reports

- 07/06 alaska trip \$307.00
- 07/05 test
- 07/05 intl test \$939.50
- 07/05 0625 \$435.33
- 07/05 alaska trip

MY TRIPS (0)
You currently have no upcoming trips.

Quick Task Bar

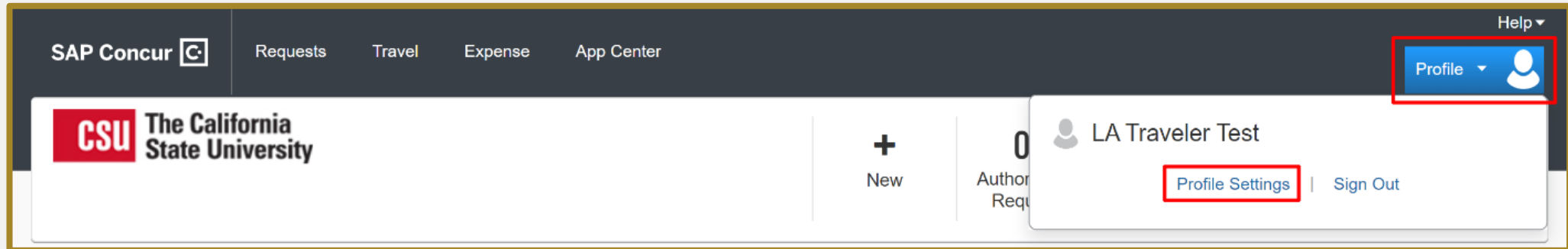
Notifications, activities, reminders will be listed here

Individual card transactions will be here

SETTING UP YOUR PROFILE



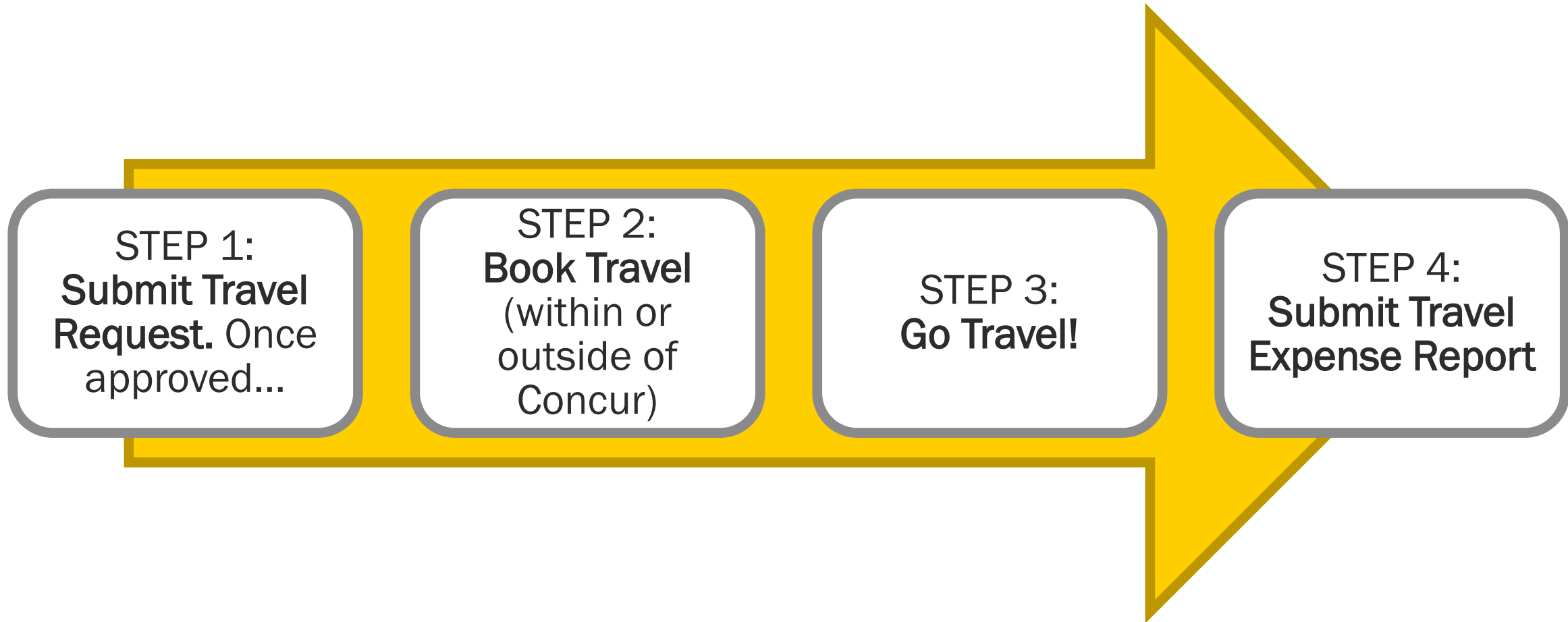
- When logging into Concur for the first time, it is important to set up your profile.
- On the Concur Homepage, click on **Profile > Profile Settings**
 - *Review your profile information and fill out all required fields.*





SUBMITTING A TRAVEL REQUEST

TRAVEL STEPS



All Travel Request and Expense Reports will go through an integrated approval workflow in Concur.

TRAVEL PLANNING CHECKLIST

- Review your **Travel Planning Checklist** prior to submitting your travel request and booking options.
- Important reminders:
 - *Travelers must submit a travel request and be approved through Concur prior to booking any travel arrangements*
 - *Attach supporting documents to your travel request (e.g., Conference Information, Event Information, Letter of Invitation, Email communications)*
 - *Travelers should keep all travel receipts*

TRAVEL PLANNING CHECKLIST PREVIEW

Travel Planning Checklist (Domestic)

Pre-Approval to Travel (recommended submission at least 30 days prior to travel)

- Travelers must submit a travel request and be approved through Concur prior to booking any travel arrangements (this excludes service providers, candidates, and non-employee students).
 - All *stateside* employees using *state funds* (including self-support and trust) will utilize Concur Travel Software.
 - Non-state employees (including students) will continue to use the current travel forms.
- Attach supporting documents (Conference Information, Event Information, Letter of Invitation, Email communications)
- Any other documents as required by your department
 - Any exception to the travel policy (e.g., lodging over \$275 per night) will need to be approved by your division VP. *If your division uses an exception justification form, be sure to complete and attach the form to your travel request. If not, your budget approver will need to add the division VP to the Concur approval workflow to review your justification comment required in your Concur travel request. (see the "Hotels" section for additional details)*

Registration Fee Payment Options

- Individual GET card, if assigned
- Department P-card
- Personal card (you will be reimbursed after returning from travel, and your expense report has been processed)
- Contact One-Stop Financial Services to pay the registration fee (after your travel request has been approved through Concur)

Estimated Expenses

- Location-based per diem meal expenses and incidentals, with an overnight stay.*



LA TRAVEL REQUEST HEADER

Fund/Dept auto-populates

Create New Request ✕

* Required field

Request Policy * *CSU-Request Policy	Request/Trip Name * ? Los Angeles Conference	Trip Type * 1-In-State
Travel Start Date * 01/23/2023	Travel End Date * 01/25/2023	
Traveler Type * Staff	Trip Purpose * Conference	If Faculty, is class covered? Search by Text
Personal Dates of Travel-If none enter NA * ? NA	Destination City/State * ? US Los Angeles, UNITED STATES	Final Destination Country * UNITED STATES (US)
Are you traveling to a banned state? * No	Are you traveling with students? * NA	Business Unit * (LACMP) LACMP - Cal State University,...
Fund * (SF100) SF100 - Globals Budget Control	Department * (500120) 500120 - Administrative Opera...	Program Search by Text
Class Search by Text	Project Search by Text	
Comments To/From Approvers/Processors ? LA Business Conference		

Do you have a plan or substitute for your classes while you are away?

Comment here to provide more info about your trip

ALLOCATION FEATURE

EXPECTED EXPENSES

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ↓↕	Amount ↑↓	Requested ↑↓
<input checked="" type="checkbox"/>	Hotel Reservation		11/09/2023	\$275.00	\$275.00 Allocated

Allocate

Expenses: 1 | \$275.00

Amount: \$275.00

Allocated 100%: \$275.00

Remaining 0%: \$0.00

Default Allocation

Code: LACMP-SF001-500000 Amount USD: \$275.00

Allocate by Percent or Amount

EXPECTED EXPENSES FOR GROUP TRAVEL

Add Expected Expense

Search for an expense type

- Ground Transportation
- Parking/Tolls
- Railway Ticket
- 04a. Meal & Incidental-International, AL, HI, U.S. Possessions
- 04b. Meals - Domestic
- 05. Hospitality
 - Hospitality
- 09. Other
 - Liability/Unfunded Only
 - Other Expense
 - Registration/Fees
- 10. Team/Group
 - Entry Fees
 - Other Accommodation (Group Only)
 - Team/Group Meals

- **Accommodations:** To add the estimated cost of multiple hotel rooms or Airbnb rentals, select the **Other Accommodation** expense type.
- **Meals:** To add the total estimated cost of meals for the trip, select **Team/Group Meals**.
- Remember to attach supporting documents under **Attachments**.

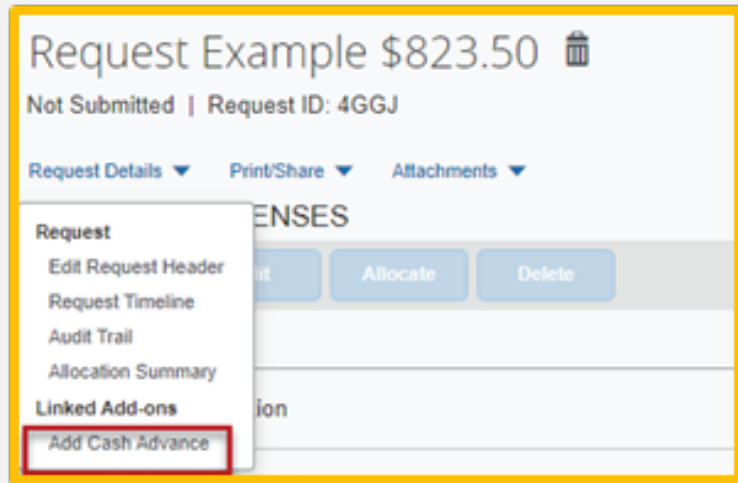
Request Details ▾ Print/Share ▾ Attachments ▾


EXPECTED EXPENSES

Attach Documents

Add Edit Delete Allocate

CASH ADVANCE FOR GROUP TRAVEL



Request Example \$823.50 

Not Submitted | Request ID: 4GGJ

Request Details ▾ Print/Share ▾ Attachments ▾

Request

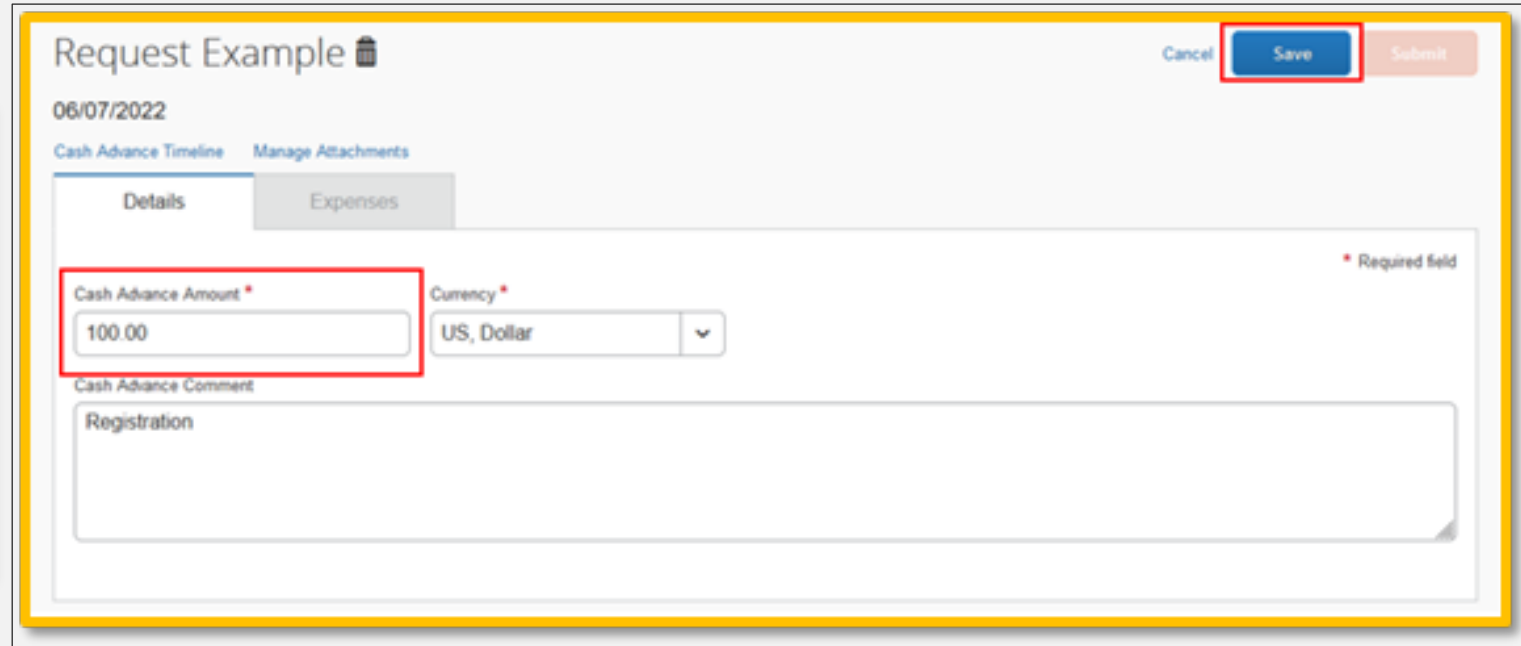
- Edit Request Header
- Request Timeline
- Audit Trail
- Allocation Summary


Linked Add-ons

- Add Cash Advance**

EXPENSES

Allocate Delete



Request Example 

06/07/2022

Cash Advance Timeline Manage Attachments

Details Expenses

Cash Advance Amount * Currency *


Cash Advance Comment

Registration

Cancel Save Submit

- If you are a group leader traveling with students and are seeking a cash advance, please complete the **Cash Advance Setup Form** prior to submitting a travel request in Concur.

CASH ADVANCE SET UP FORM PREVIEW



CAL STATE LA
CALIFORNIA STATE UNIVERSITY, LOS ANGELES

Last Updated: 02/21/2024

Cash Advance Request Form

ONE-STOP FINANCIAL SERVICES/SERVICE CENTER

Purpose:

To obtain access to cash advance requests for group travel through the Concur Travel & Expense System as an employee.

Requestor Information

First Name:		Employee ID #:	
Last Name:		Campus Phone:	
Campus Email Address:		Department ID:	

Reason for Cash Advance

I will be a group leader for future group travel with students.

Certification and Approvals

The following will apply to every cash advance that I obtain:

- When I accept custody of advanced funds, I agree to be accountable for the appropriate care and disposition of these funds, including safeguarding against loss or theft. In the event of loss or theft, or unauthorized or unreconciled distribution, the University may require reimbursement from me for the amount lost or stolen. Should that be the case, I understand it could result in collection activities that may include internal and external collection efforts, deduction from future travel claims, deduction from a payroll warrant, and/or tax refund offset.
- I will not use advanced funds for purposes other than approved travel expenses, and I will make advanced funds available for audit. I am responsible for complying with all applicable rules, regulations, and policies, including reconciling advanced funds with appropriate receipts and documentation within the required time frame.
- I understand cash advances may be picked up at the One-Stop Financial Services, Student Services Bldg., Room 2380 or directly deposited into my bank account after processing in the Concur Travel & Expense System. Furthermore, I understand it is my responsibility to reimburse the University for the unused portion of the cash advances at the time of reconciliation of the expense report in Concur within 60 days after a trip is completed.

 Requester Signature Date

Approver Information

DOA Approver First Name		Position/Title	
DOA Approver Last Name		Email Address	

I approve the person named above to be set up within the Concur Travel & Expense System to request cash advances. Furthermore, I understand that cash advance requests submitted by this individual will require my approval within the Concur Travel & Expense System before advanced funds will be issued.

 DOA Approver Signature (level 4 or above) Date


OFFICE USE ONLY:



PRINT/SHARE FEATURE

Faculty Conference \$1,561.00

Not Submitted | Request ID: DDJV

Request Details ▾ **Print/Share ▾** Attachments  ▾

*CSU-Request Printed Report

EXPECTED EXPENSES

Add **Edit** **Delete** **Allocate**

- You can use the **Print/Share** feature to share your Travel Request Header and Expected Expenses as needed.
- You can also download your supporting documents from **Attachments**.

*CSU-Request Printed Report ✕

Request to Travel

Request ID : **DDJV**
Request/Trip Name : **Faculty Conference**
*Trip Purpose : **Conference**
Travel Start Date : **11/13/2023**
Travel End Date : **11/15/2023**
Destination City/State : **Santa Barbara (US)**
Destination Country : **UNITED STATES (US)**
Requested Amount : **\$1,561.00**

Traveler

User Name
Email Address

Request Header Details

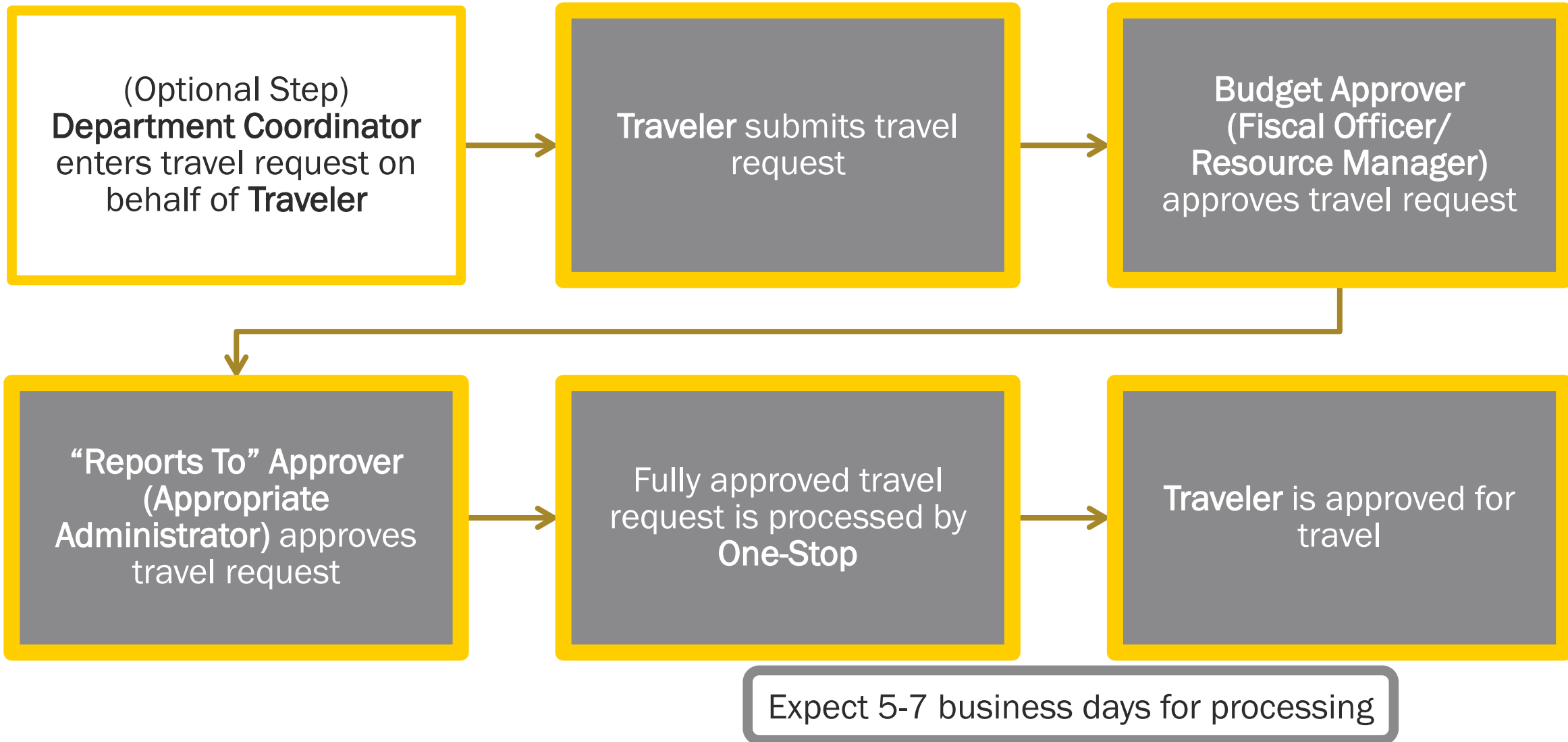
*Trip Type : **1-In-State**
*Traveler Type : **Faculty**
*If Faculty, is class covered? : **Yes**
*Personal Dates of Travel : **NA**
*Business Unit : **LA-LACMP (LACMP - Cal State University, L.A.)**
*Fund : **LA-LACMP-SF001 (SF001 - Campus Operating Fund)**
*Department : **LA-LACMP-SF001-500000 (500000 - VPA/CFO)**

Close **Print** **Save as PDF** **Email**

APPROVER ROLES

- The **Budget Approver** (Fiscal Officer) is based on DOA and your Dept. ID/fund combination.
- The **“Reports To” Approver** (Appropriate Administrator) is your supervisor provided by HR.
- For the approval flow to be accurate, please make sure position numbers are up to date with the appropriate MPP supervisor.
 - *The fiscal officer can check the position number by going to **GET > CSULA Baseline > CSULA Human Resources > Position by Dept***

BASIC TRAVEL REQUEST WORKFLOW



BUDGET APPROVER: EDIT APPROVAL FLOW

- Budget approvers can add additional approvers anywhere in the approval workflow.
- Before clicking Approve, select **More Actions > Edit Approval Flow**
- To add an additional approver, click on **+ Add Step** where you want to insert an additional approver into the workflow.
- Click **Save**, then **Approve** to send the travel request to the next approver.

Edit Approval Flow

Budget Approval

Test, Budget Approver1

+ Add Step

48100 - Accounts Payable (SA-SACST-MDS01-48100)

Test, Budget Approver1

+ Add Substep

User-Added Approver

Search by Last Name Delete

+ Add Step

"Reports To" Approval2

Test, SA Approver

+ Add Step

User-Added Approver

Search by Last Name Delete

+ Add Step

Approval for Processing

Cancel Save

IMPORTANT NOTE

An Approver MUST approve or send back a Concur travel request within 10 calendar days of receiving the request for approval.

If an Approver does not act on the travel request within this timeframe, the request will be automatically forwarded to the Approver's direct supervisor for approval, according to HR.

Please check your junk mail if you are not seeing email notifications regarding Concur approval requests.

HOW TO CHECK YOUR PENDING TRAVEL REQUEST



- You can view where your travel request is pending in the approval workflow
- Go to **Requests** > Click on your active request > **Request Details** > **Request Timeline**

Request Timeline

Out State - LA Test | \$2,320.00

Approval Flow

```
graph TD; A((Budget Approval)) --- B((Reports To Approval)); B --- C((User-Added Processor));
```

Budget Approval
System, Concur

"Reports To" Approval2
System, Concur

User-Added Processor

Request Summary

Request Comment
Test, LA Traveler 02/17/2022
Spring Training: IT Conference

Expense Comment Hotel Reservation 03/24/2022 \$600.00 [View](#)
Test, LA Traveler 02/28/2022
Tax 15%

Submitted



BOOKING YOUR TRAVEL

CHANGES TO BOOKING & PAYMENT FOR TRAVEL



Early reimbursement of expenses will no longer be an option



We are also moving away from cash advances*




New Golden Eagle Travel (GET) Card




Additional booking options available in Concur


GOLDEN EAGLE TRAVEL (GET) CARD

A white icon of a stack of cash inside a grey circle.


You can request a University-issued travel card, called the GET card, to avoid out-of-pocket travel expenses; *highly recommended for frequent travelers (i.e., 3 or more trips per calendar year).*

A white icon of a credit card inside a gold circle.

With the GET card, you can pay for business expenses: *Airfare, Lodging, Car Rental, Gas, Registration, Parking, Ground Transportation, and more.*

A white checkmark icon inside a grey circle.

Note: GET cardholders are responsible for ensuring that all charges comply with University policy (card is linked to your department accounts).

A white envelope icon inside a gold circle.

If you're interested in applying for a GET card, ask your Resource Manager to contact Service Center for the application at travel@calstatela.edu

WAYS TO BOOK YOUR TRAVEL

	Can I book through Concur?	Can I book outside of Concur?*
Flight	Yes, recommended since charged directly to department	Yes
Hotel	Yes	Yes, recommended if using conference group rate
Car Rental	Yes, recommended since contracted CSU rates already incorporated	Only by directly contacting One-Stop/Service Center
Registration Fee	No	Yes

**All booking services can also be done directly through One-Stop/Service Center*

WAYS TO PAY FOR YOUR TRAVEL



	Personal Card*	GET Card	P-Card	Charged directly to department**	One-Stop/Service Center
Registration Fee	Yes	Yes	Yes	No	Yes***
Flight	Yes	Yes	No	Yes, recommended	Yes
Hotel	Yes	Yes	No	No	Yes
Car Rental	Yes	Yes	No	No	Yes
Meals & Incidentals	Yes	Yes	No	No	No

**If using a personal card, you will be reimbursed after returning from travel once your expense report has been processed.*

***When booking through Concur*

****If there is no P-card or GET card available for the traveler*



SUBMITTING AN EXPENSE REPORT

EXPENSE REPORT CHECKLIST



- Review your **Expense Report Checklist** prior to submitting your Concur expense report.

- Main categories to add to your expense report include:
 - *Digital copies of receipts for expenses*
 - *Incidentals with an overnight stay*
 - *Meals with an overnight stay*
 - *Additional supporting documents (e.g., mileage)*

- It is recommended to sign up for direct deposit for employee reimbursement in lieu of receiving a physical check. You can initiate this request by emailing One-Stop Financial Services at 1stopfinancial@calstatela.edu

EXPENSE REPORT CHECKLIST PREVIEW

Expense Report Checklist

You may use this guide as a reminder of items that may need to be included in your expense report. Depending on your travel, some of the following items may not be relevant.

It is highly recommended to submit your expense report as soon as possible and no later than 60 days after your travel end date.

Please reach out to One-Stop Financial Services if you have any questions.

- Receipts for expenses*
 - Hotel Folio (Payment Receipt)
 - Air (Itinerary with Receipt)
 - Registration
 - Car Rental
 - Transportation
 - Other Business Expenses (ex. luggage fee, gas for rental)
 - When itemizing expenses, be sure to include all trip expenses (not just out-of-pocket) in order to validate the total business cost of the trip.*

- Meals with overnight stay (location-based per diem meals and incidentals)

- Additional Supporting Documents – examples provided below:
 - Attendance Verification for Virtual Webinars, Conferences, Training, etc.
 - Conference Agenda



CONCUR'S AVAILABLE RECEIPTS LIBRARY





LOCATION-BASED PER DIEM FOR MEALS & INCIDENTALS

Conference \$0.00

Not Submitted | Report Number: PYOSP2

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Add Expense

Edit

Delete

Copy

Allocate

Manage Travel Allowance

Combine Expenses

Move to ▾

1. Click **Travel Allowance > Manage Travel Allowance**.

Travel Allowances For Report: Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name

Conference

Selection

USGSA

Add Stop

Delete Rows

Import Itinerary

2. Click **Create New Itinerary** (or **Import Itinerary** if booked travel in Concur).

LOCATION-BASED PER DIEM FOR MEALS & INCIDENTALS

3. Enter your travel stop details (departure to arrival & arrival to departure).

Edit Itinerary Stop

Departure City
San Francisco, California

Date: 11/08/2023 Time: 08:00 AM

Arrival City
Sacramento, California

Date: 11/08/2023 Time: 10:00 AM

[Save](#)

Edit Itinerary Stop

Departure City
Sacramento, California

Date: 11/13/2023 Time: 05:00 PM

Arrival City
San Francisco, California

Date: 11/13/2023 Time: 08:00 PM

[Save](#)

LOCATION-BASED PER DIEM FOR MEALS & INCIDENTALS

4. Mark any specific meals that were provided on your trip which will automatically be deducted.

Travel Allowances For Report: Conference ↗ ×

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to Go

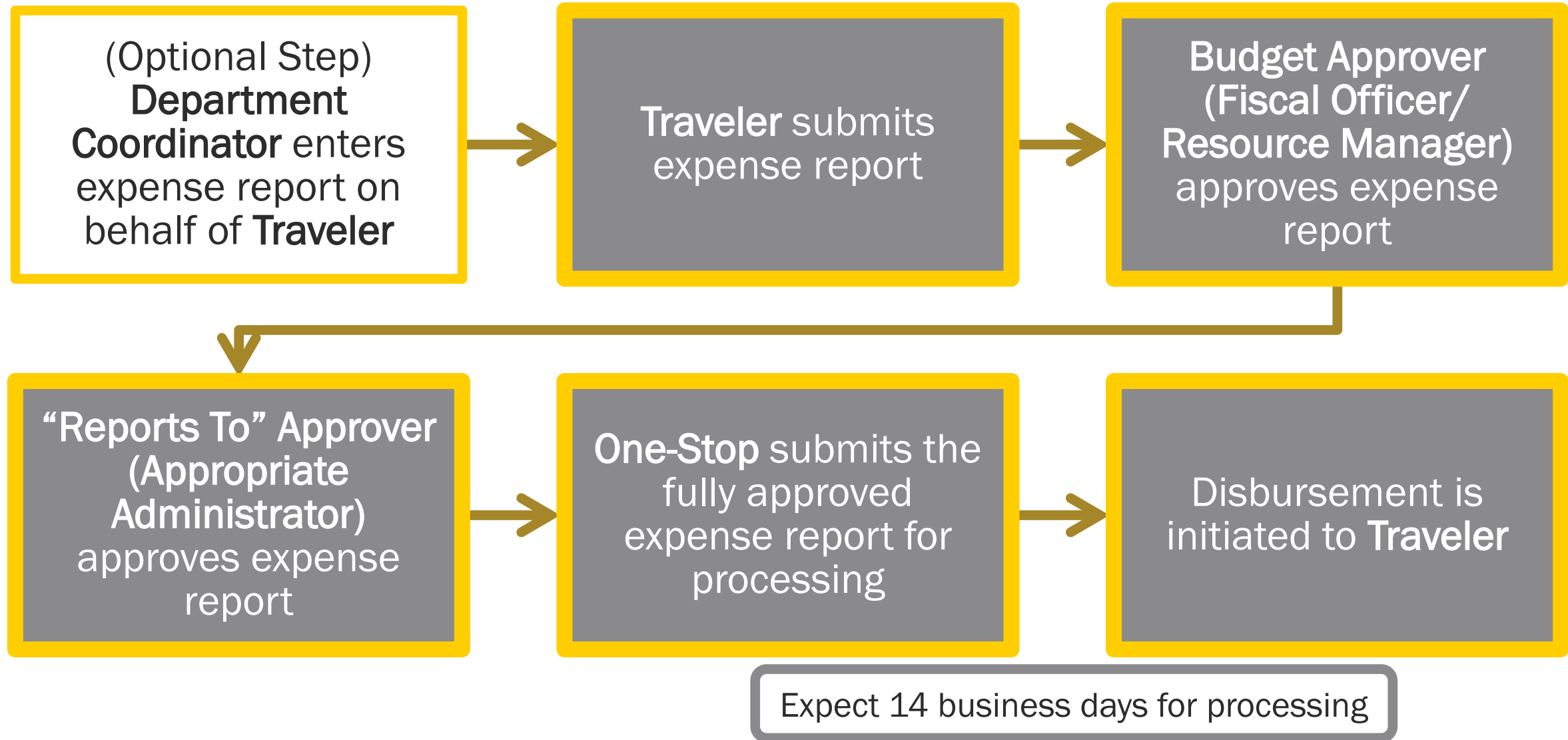
Exclude All <input type="checkbox"/>	Date/Location↑	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	11/08/2023 Sacramento, California	\$51.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75
<input type="checkbox"/>	11/09/2023 Sacramento, California	\$69.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	11/10/2023 Sacramento, California	\$69.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	11/11/2023 Sacramento, California	\$69.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$38.00
<input type="checkbox"/>	11/12/2023 Sacramento, California	\$69.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	11/13/2023 Sacramento, California	\$51.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75

LOCATION-BASED PER DIEM FOR MEALS & INCIDENTALS

5. Meal Expenses will then automatically be added to the expense report.

Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Requested↓↑
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/13/2023	\$51.75
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/12/2023	\$69.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/11/2023	\$38.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/10/2023	\$53.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/09/2023	\$53.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/08/2023	\$51.75
				\$316.50

BASIC EXPENSE REPORT WORKFLOW



IMPORTANT NOTE

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Please check your junk mail if you are not seeing email notifications regarding Concur approvals.

HOW TO CHECK YOUR PENDING EXPENSE REPORT

- You can view where your expense report is pending in the approval workflow
- Go to **Expenses** > Click on your active request > **Expense Details** > **Expense Timeline**

Request Timeline

Out State - LA Test | \$2,320.00

Approval Flow

```
graph TD; A((Budget Approval)) --- B(( 'Reports To' Approval2 )); B --- C((User-Added Processor));
```

Budget Approval
System, Concur

"Reports To" Approval2
System, Concur

User-Added Processor

Request Summary

Request Comment
Test, LA Traveler 02/17/2022
Spring Training: IT Conference

Expense Comment Hotel Reservation 03/24/2022 \$600.00 [View](#)
Test, LA Traveler 02/28/2022
Tax 15%

Submitted



ASSIGNING & ACTING AS A DELEGATE/TRAVEL ARRANGER

DELEGATES & TRAVEL ARRANGERS



Delegates can be authorized to act on behalf of a traveler or review/approve on behalf of an approver.

Travel arrangers can be authorized to book travel on behalf of the traveler.

Note that a user must first be assigned as a delegate before also being assigned as a travel arranger.

It is still the responsibility of the traveler to review and submit their own travel requests and expense reports.

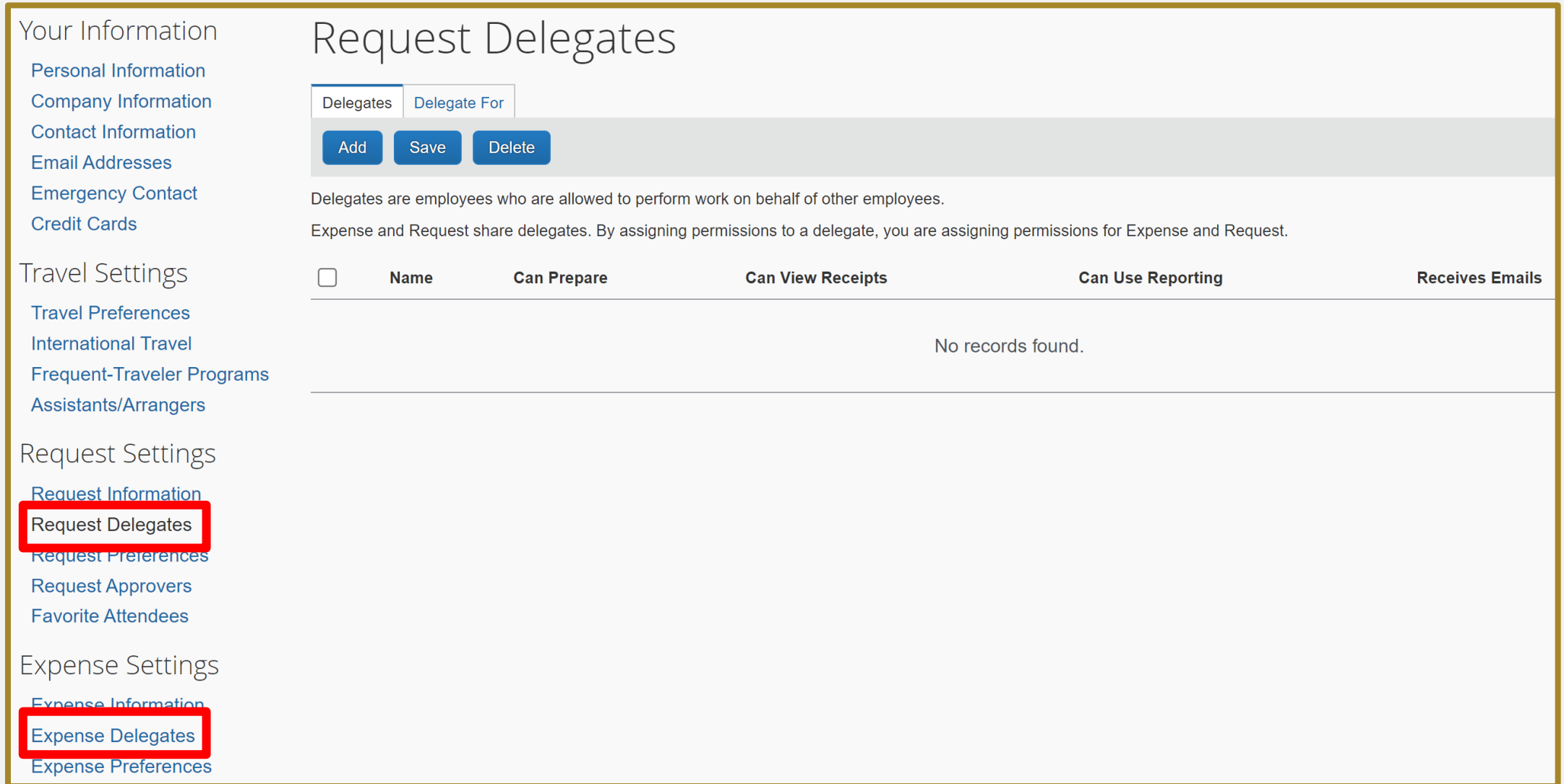
ACTING AS A DELEGATE



The screenshot displays the SAP Concur homepage for The California State University. The top navigation bar includes the SAP Concur logo and a 'Home' dropdown. Below this, the CSU logo is visible on the left, and several action buttons are on the right: '+ Start a Request', '+ Start a Report', '00 Required Approvals', and '00 Authoriz Reque'. The main content area is titled 'Tasks' and contains three cards: '00 Required Approvals' (with the message 'Great! User currently has no approvals.'), '00 Available Expenses' (with 'User currently has no available expenses.'), and '00 0 Profile Settings' (with 'User currently has no open reports.'). Each card has a checkmark icon at the bottom. On the right side of the page, a user profile dropdown menu is open, showing 'Acting as' with a user icon. Underneath, there is a section titled 'Act as Another User' with a search bar 'Search by name or ID' and a 'Switch' button. Below the search bar, the 'Act As' options are listed: 'Myself' (unselected) and 'A Delegate for another user who has granted you this permission' (selected).

On the Concur Homepage, click on **Profile**. Under the *Act as Another User* drop-down, mark **Act As: A Delegate for another user who has granted you this permission**. Then search for the user you are acting as a delegate for and click **Switch**. To switch back, mark **Act As: Myself**.

SETTING UP A DELEGATE



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates**
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates**
- Expense Preferences

Request Delegates

Delegates Delegates For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
No records found.					

On the Concur Homepage, click on **Profile > Profile Settings**. Then go to either **Request Settings > Request Delegates** or **Expense Settings > Expense Delegates**.

SETTING UP A TRAVEL ARRANGER

On the Concur Homepage, click on **Profile > Profile Settings**.

Then go to *Travel Settings > Assistants/Arrangers*.

Travel Settings

[Travel Preferences](#)

[International Travel](#)

[Frequent-Traveler Programs](#)

[Assistants/Arrangers](#)

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers [+ Add an Assistant](#)

You currently have no assistants defined.

[Save](#)

HELPFUL RESOURCES

- Travel Planning Checklist
- Expense Report Checklist
- Definition Sheet
- FAQ

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