



Concur End User Overview Training



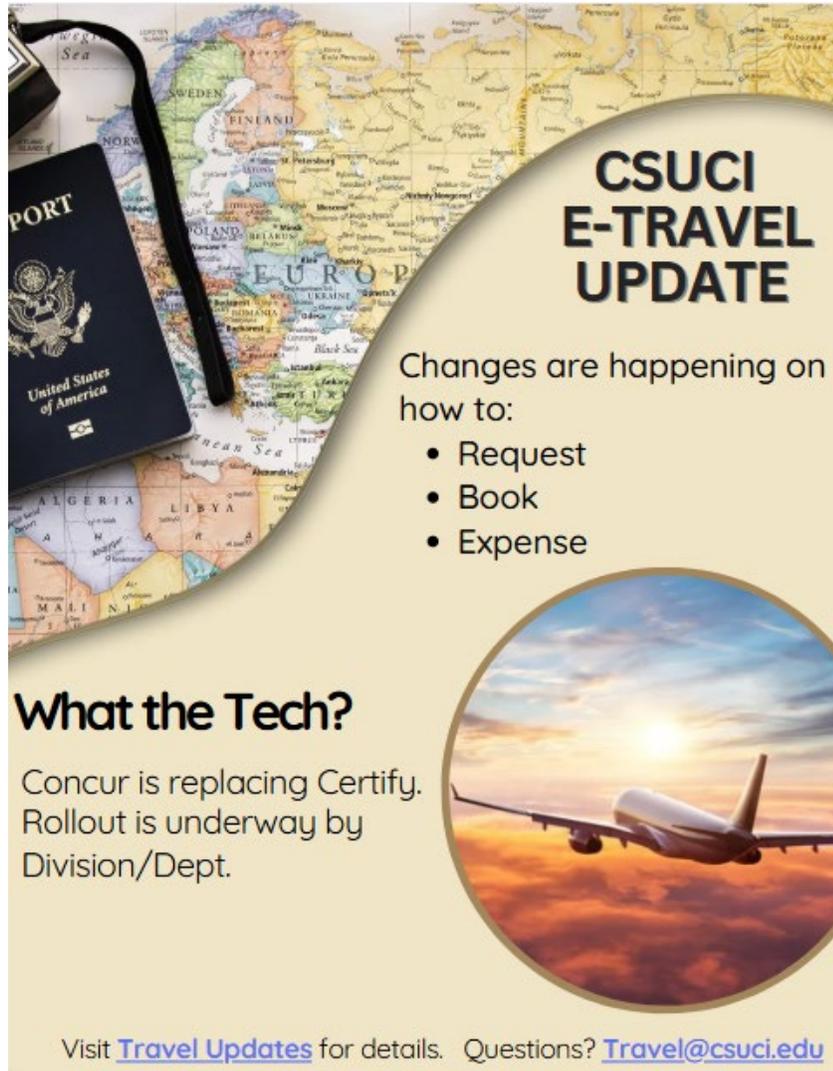
**FINANCIAL
SERVICES**

C H A N N E L
I S L A N D S



Spring 2025

Reason We are Here



**CSUCI
E-TRAVEL
UPDATE**

Changes are happening on how to:

- Request
- Book
- Expense

What the Tech?

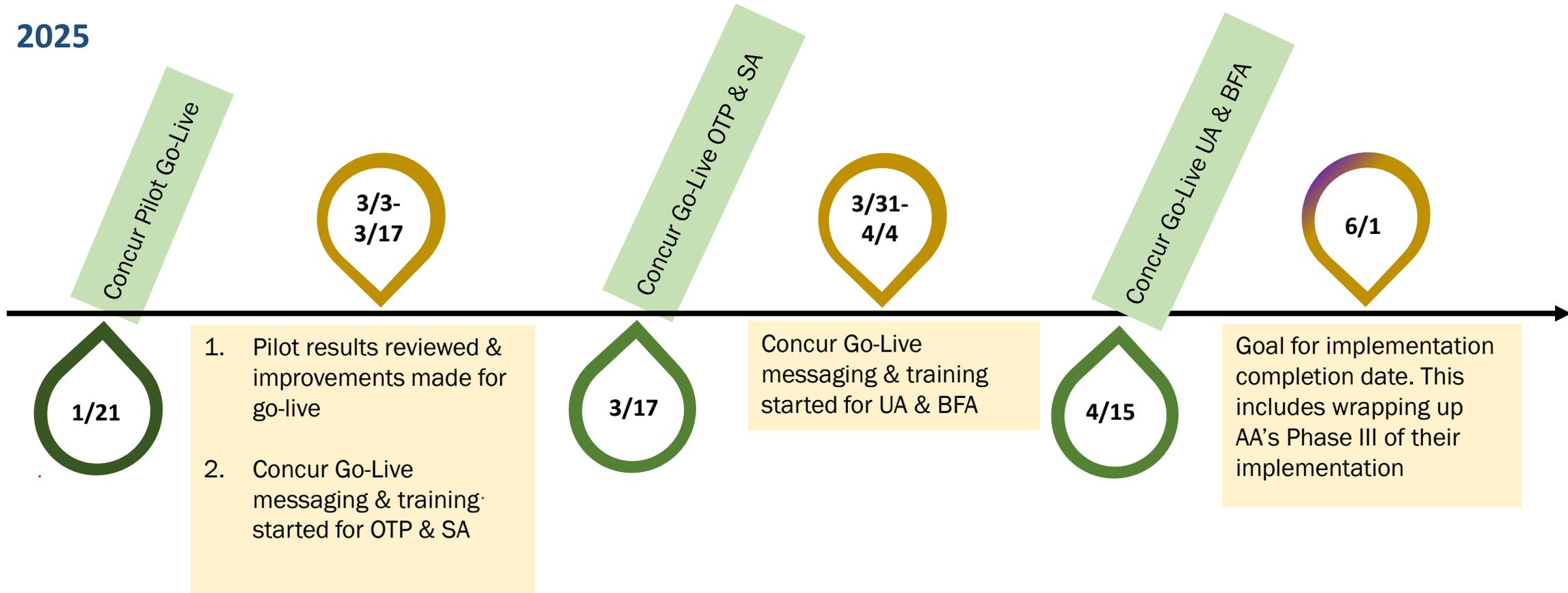
Concur is replacing Certify. Rollout is underway by Division/Dept.

Visit [Travel Updates](#) for details. Questions? Travel@csuci.edu

- eTravel system is changing
- Rollout to campus is staggered
- Travel webpage is updated to include information about Concur
 - Training materials available too
- **Financial Service would like to partner with you to get word out about Concur to your division**
 - Office of the President
 - Student Affairs

Implementation Timeline

2025



Important Travel Reminder Re: Real ID

Starting May 7, 2025, the TSA will require state-issued driver's licenses or identification cards that meet REAL ID standards to board domestic flights.

Check ID – Look for the REAL ID star on their driver's license.

Apply if needed – Visit DMV website for requirements.

Use an alternative ID – A passport, Global Entry card, or other TSA-approved ID will also be accepted.

Don't let outdated identification disrupt your organization's travel plans. For more details, visit the Department of Homeland Security [REAL ID FAQs](#).



Learning Objectives

1. How to Access Concur
2. Understand Key Features and Functionality in Concur:
 - Travel Requests (TR)
 - TR Alert Reconciliation
 - Request IDs
 - Booking Travel
 - Travel Expense Report (TE)
 - TR & TE Approval Process
3. Ensure Concur Profiles are Properly Setup for:
 - Travelers
 - Name
 - Mobile Phone Number
 - Email
 - Travel Coordinators
 - “Request Delegate” or “Expense Delegate” → Prepare Travel Request and/or Expense Report on behalf of Traveler
 - “Assistants” or “Travel Arrangers” → Book Travel on behalf of Traveler
4. Understand How to Coordinate Group Travel



1. How to Access Concur

Now available to CSUCI employees via myCI



CSUCI Travel
Access to Certify and Concur to request, book, and expense travel



CSUCI Travel Application Page

IMPORTANT UPDATE: Financial Services currently has two active eTravel systems (Concur and Certify). Please read the use cases for each system to help decide which one to use.

<p>Concur</p>	<p>Use Cases</p> <p>Pilot Audience:</p> <ul style="list-style-type: none">• Office of the President. Contact Courtney Ellis for more information.• Student Affairs. Contact Dianne Wei for more information.• Specific Faculty in Academic Affairs. Contact Rosa Bravo and Edna Davoudi for more information. <p>Purpose: Request travel, book travel, update travel itineraries*, track expenses, and submit travel expense reports <i>*If travel was booked using Certify. Continue to use Certify.</i></p>
<p>Certify</p>	<p>Audience:</p> <ul style="list-style-type: none">• Majority of those who report into Academic Affairs. Contact Rosa Bravo and Edna Davoudi for more information.• Division of Business and Financial Affairs• Division of University Advancement <p>Purpose: Book new travel, update travel itineraries, and track expenses.</p>

Key Features & Functionality → What is a Travel Request?

- **Travel Request** is a **NEW** eTravel step. It results in the generation of a unique **Request ID**.
- Travel Requests require trip details called “Headers”
 - There are 20 “Headers”
 - Once populated, this information will carry over to the next logical steps within Concur (Travel Booking then Travel Expense Reporting)

Headers:

1. Request Policy: (Select *CSU-Request Policy)
2. Request/Trip Name: (Please use a unique name to identify the trip/purpose other than Employee’s name.)
3. Trip Type: (Select one of following: 1-In-State, 2-Out-of-State, or 3-International)
4. Travel Start Date: (Enter MM/DD/YYYY)
5. Travel End Date: (Enter MM/DD/YYYY)
6. Traveler Type: (Select Auxiliary, Faculty, or Staff)
7. Trip Purpose: (Select the option that is most applicable.)
8. If, Faculty [is traveling], is their class covered: (Select Yes, NA, or No)
9. Personal Dates of Travel [if any], if none enter N/A: (Personal days should fall within Travel Start and End Dates. If there are no personal travel days, please enter NA in field.)
10. Destination City/State (Enter the City/State. If you are using this request to cover mileage by month, not by trip, enter California.)

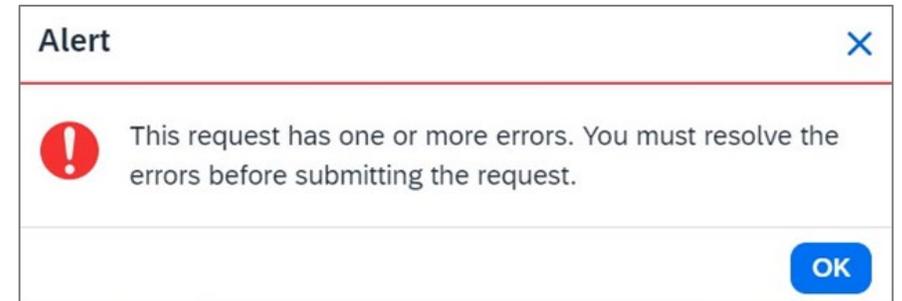
Key Features & Functionality → What is a Travel Request? (Cont.)

Additional Headers:

11. Destination Country: (Select the option that is most applicable)
12. Are you traveling to a banned state: (Select No. We currently do not have any banned states)
13. Are you traveling with students? (Select Yes, NA, or No)
14. Business Unit: (Keep this as (CICMP – CSU Channel Islands)
15. Fund: (Search and select the fund)
16. Department: (Search and select the department)
17. Program: (Only to be used if this trip applies to a program of study- Search and select the program)
18. Class: (Only to be used if this trip applies to a class- Search and select the class)
19. Project: (Only to be used if this trip applies to a project- Search and select the project)
20. Comments To/From Approvers/Processors: Note this does not appear until after the request has been created. See instructions under Alerts for how to update this required field.

NOTE: After selecting “Create Request,” the initiator can expect to receive one or more **Alerts**. These must be responded to, but not all need to be reconciled before the request is “Submitted”.

Key Functionality → TR Alert Reconciliation



Most common Alerts:

Alerts: 3

REQUEST

- ✘ The Request has no Segments or Expenses. You must create at least one entry in order to submit the Request. Once added, please disregard this message
- ✘ ACTION REQUIRED: An agenda, itinerary, or screen shot of Conference information (Name, date, location) must be attached to Request. [View](#)
- ✘ ACTION REQUIRED: Please enter trip justification/information in Comments section of the request header or add an attachment with information that supports. Please continue with request after saving. [View](#)

Common Actions Needed:

1. Must add at least One Segment or Expense
2. An Agenda, Itinerary, Screen Shot, or Other Documentation Needs to be Attached to Request
3. Trip Justification/Information Needs to be Entered in Comments
4. **Missing Vendor ID → Follow up with Travel@csuci.edu (Must be done before Expense Report is processed)**

Key Functionality → TR Alert Reconciliation (Cont.)

✖ The Request has no Segments or Expenses. You must create at least one entry in order to submit the Request. Once added, please disregard this message

Must Add at Least One Segment or Expense

SAP Concur Requests

Manage Requests

Home / Requests / Manage Requests / Name of Trip

Name of Trip

Not Submitted | Request ID: FJVT

Request Details Print Attachments

Submit Request Copy Request

EXPECTED EXPENSES

Add Edit

1

Manage Requests

Home / Requests / Manage Requests / Name of Trip / New Expense: Other Expense

New Expense: Other Expense

Allocate

* Required field

Travel Start Date * 04/15/2025

Travel End Date * 04/25/2025

Amount * 3,000.00

Currency * US, Dollar (USD)

Comments To/From Approvers/Processors 37/2000

Total estimate for all trip expenses.

Save Cancel

3

Add expected expenses and/or travel plans

Search by expense type, category, description

Collapse All Sections

- Ground Transportation
- Parking/Tolls
- Railway Ticket
- 04a. Meal & Incidentals Per Diem
- 04b. Meals - Domestic (Travel prior to 1-1-24)
- 05. Hospitality
 - Hospitality
- 09. Other
 - Liability/Unfunded Only
 - Other Expense
 - Reduction
 - Registration/Fees
- 10. Team/Group
 - Entry Fees

2

This example is like an After-the-Fact Travel Request Expense Entry

Key Functionality → TR Alert Reconciliation (Cont.)

✘ ACTION REQUIRED: An agenda, itinerary, or screen shot of Conference information (Name, date, location) must be attached to Request. [View](#)

Must Add an Agenda, Itinerary, Screen Shot, or Other Documentation. Needs to be Attached to Request

The screenshot shows the SAP Concur interface for managing requests. At the top, there is a navigation bar with 'SAP Concur' and 'Requests'. Below this, there is a breadcrumb trail: 'Home / Requests / Manage Requests / M Bergem London'. An 'Alerts: 1' section is visible, containing a red warning icon and the text: 'ACTION NEEDED: Attach a justification for the travel, including your role and why it is mission critical. Include an itinerary with details of trip destination(s). Information is shared with Risk Management to secure foreign travel insurance. View'. Below the alert, the request title 'M [redacted] London' is displayed, along with 'Not Submitted' and 'Request ID: FJP7'. There are buttons for 'Request Details', 'Print', and 'Attachments'. A 'Submit Request' button is highlighted with a green circle '5'. Below the request title, there is an 'EXPECTED EXPENSES' section with an 'Attach Documents' button highlighted with a green circle '2'. Other buttons in this section include 'Add', 'Edit', 'Delete', and 'Allocate'.

The screenshot shows a dialog box for attaching documents. It features a blue icon of a document with an upward arrow and a hand cursor. Below the icon, the text reads: 'Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.' An 'Upload and Attach' button is highlighted with a green circle '3'. A 'Close' button is located at the bottom right of the dialog box, highlighted with a green circle '4'.

Key Functionality → TR Alert Reconciliation (Cont.)

✘ ACTION REQUIRED: Please enter trip justification/information in Comments section of the request header or add an attachment with information that supports. Please continue with request after saving. [View](#)

Trip Justification/Information Needs to be Entered in Comments

How to add Comments:

Use “[View](#)” link on the Alert window, scroll down, enter comments, then select Save.

Class 2 Project 2

Comments To/From Approvers/Processors ? 0/500

1

Cancel 2 Save

Key Features & Functionality → Request ID

1. **Request ID** is what allows travel to be Booked and Travel Expenses to be created
2. Generated when a Travel Request is created.
3. Travel Coordinators will need to provide this number to Christopherson Business Travel (CBT), our new travel concierge service provider when group travel is being arranged.
4. **Request ID** appears under the Trip Name tile on the Request dashboard.
 - Examples highlighted in yellow :

The screenshot displays the SAP Concur 'Manage Requests' dashboard. At the top, there's a navigation bar with the SAP Concur logo, a 'Requests' dropdown menu, and user initials 'MB'. Below this is a breadcrumb trail: 'Home / Requests / Manage Requests'. The main heading is 'Manage Requests'. A 'View: Active Requests' dropdown is on the left, and a '+ Create New Request' button is on the right. The dashboard features eight request cards arranged in a 2x4 grid. Each card shows the request name, date, and Request ID. The Request IDs 'FJTT', 'FJV3', 'FJV6', 'FJVT', 'FJTV', 'FJRJ', 'FJP7', and 'FJNW' are highlighted in yellow. The status of each request is indicated by a button: 'Submitted' (green) or 'Not Submitted' (blue). Some cards also show a status message or a warning icon.

Request Name	Date	Request ID	Status	Amount	Notes
Melissa Bergem	04/15/2025	FJTT	Submitted		Pending "Reports To" Approval2 Asha Ramachandra
UNIV392 Faculty-Led New Zeala...	04/15/2025	FJV3	Not Submitted		
Trip Alert	04/15/2025	FJV6	Not Submitted		
Name of Trip	04/15/2025	FJVT	Not Submitted	\$3,000.00	
NE Test 011025	01/22/2025	FJTV	Submitted	\$61.64	
Demonstration Trip Request for S	01/01/2025	FJRJ	Submitted	\$333.00	
M Bergem London	10/01/2024	FJP7	Not Submitted		
tahiti	08/29/2024	FJNW	Not Submitted	\$195.00	

Key Features & Functionality → Request ID

Request ID Uses Vary-

1. **After-the-Fact-** For those wanting to expense travel using Concur but who booked travel in Certify.
2. **Mileage** - For those who want to create a blanket travel request by semester and keep it open to use for monthly mileage expense reports.
3. **Group Travel-** For travel that involves more than one traveler.
 - There may be more than one travel expense report for one travel request.
4. **International Travel-** Requires International Travel Approval (ITA) be attached to the Travel Request too. All approvers should look to confirm that all required signatures were captured on the attached copy of the completed Adobe Sign form.
5. **Non-Employee Travelers-** who are going to submit an expense report need to request a 204 and have an employee submit a Travel Request on their behalf to have a Non-Employee Request ID to build off of to generate the Expense Report



Key Features & Functionality → Booking Travel

1. Concur Travel Booking is for Business (and Course) Travel Only (no personal travel). It is travel that is paid for or reimbursable by the University. Be sure to follow the latest Travel Policy.
2. Must enter a Travel ID in Concur or provide Christopherson Business Travel with the Travel ID
3. Travelers should review their Concur profile and ensure information is complete before booking travel
4. **If you have trip itineraries created in Certify, use them. Do not recreate them in Concur. But do book all new travel in Concur.**
5. Once a Travel Request has been approved the status will change to “Pending Online Booking”

TRAVEL RESERVATION FROM AN APPROVED REQUEST

6.
 1. Click **Requests, Manage Requests**
 2. Requests that have a status of **Pending Online Booking** are ready to begin the booking process
 3. Click the **Request name**, or the **Book** link found under **Action**
 4. Click **Book**
 5. On **Your Itinerary** page, change departure/pickup time, if needed
 6. Click **Proceed to Booking**
3. Click **Next** if you are ready to purchase the trip or select **Hold Trip**, if you are not ready to purchase the trip
4. Click **Confirm Booking**
5. Once you receive the **Finished Page**, scroll to the bottom for the option to print or email your itinerary

CANCEL A TRAVEL RESERVATION

1. Click **Travel > Upcoming Trips**
2. Click on the trip to be canceled and choose **Cancel Trip** from the list of **Trip Actions**

QUESTIONS? CONTACT Travel@csuci.edu

COMPLETING RESERVATION (APPROVED REQUEST)

1. On the **Travel Details** page, review the details of your reservation and the **Total Estimated Cost**, click **Next**
2. On the **Trip Booking** information page, the **Trip Name** and **Trip Destination** fields will be populated from the **Request Header**



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Key Functionality → Travel Expense (TE) Report

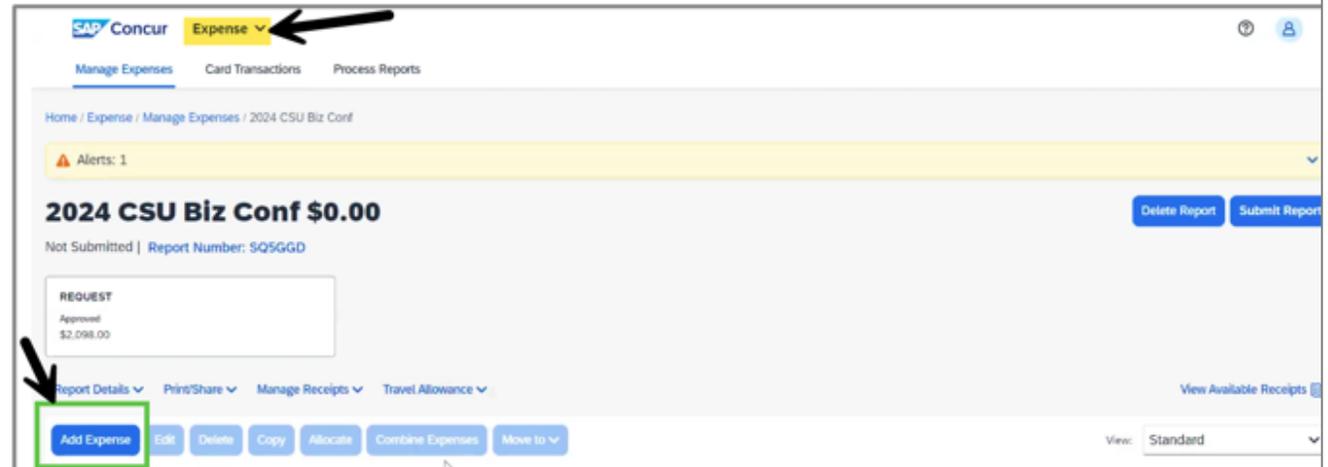
Pilot members may begin creating Expense Reports in Concur for travel that was booked in Certify, but this requires the creation of an After-the-Fact Travel Request first.

CREATE AN EXPENSE REPORT:

1. To start an Expense Report, click **Requests**, on the Quick Task Bar identify the applicable **Request**, and click **Create Expense Report**
2. **Create Expense Report** will open, and **Header** information will automatically populate from the related request



3. Click **Add Expense**



4. After adding all existing credit card transactions as expenses, you can **Create New Expenses** and select the correct expense type for each.

Key Functionality → Travel Expense (TE) Report (Cont.)

- Concur Expense Reports require travel allowances if requesting meal and incidental reimbursement. This is done first to represent all meals for the travel days.
 - Use Travel Allowance → Travel Allowance and the following window will appear.

The screenshot displays the 'Travel Allowance' management interface. At the top, there are navigation tabs: 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. Below these, the 'Expenses' section shows a 'View: Standard' dropdown and a 'Manage Travel Allowance' button. A hand cursor is shown clicking this button. Below the main interface, a secondary window titled 'Travel Allowances For Report: 24/09/03-06 Sonoma P2P' is open. This window has a navigation bar with three steps: '1 Create New Itinerary', '2 Available Itineraries', and '3 Expenses & Adjustments'. The 'Create New Itinerary' step is highlighted with a blue box. Below the navigation bar, the 'Itinerary Info' section includes an 'Itinerary Name' text field and a 'Selection' dropdown menu. To the right, the 'New Itinerary Stop' section contains two sets of input fields for 'Departure City', 'Date', 'Time', and 'Arrival City'. The 'Date' and 'Time' fields include calendar icons. At the bottom left, there are buttons for 'Add Stop', 'Delete Rows', and 'Import Itinerary', and a message that says 'No Itinerary Rows Found'.

Key Functionality → Travel Expense (TE) Report (Cont.)

- Locate the itinerary and import, then select the appropriate itinerary and navigate to the Adjusting Allowance section.

Travel Allowances For Report: 24/09/03-06 Sonoma P2P

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: [Text Field] Selection: [Dropdown]

New Itinerary Stop

Buttons: Add Stop, Delete Row

Departure City: [Text Field]

No Itinerary Rows Found

Modal: Select trips and charges to use to create this itinerary

<input type="checkbox"/>	Description	Start Date	End Date
<input checked="" type="checkbox"/>	Trip from Santa Ana to Santa Rosa (8NPS9N)	[Date]	[Date]

Buttons: Import, Cancel

Save

Go to Single Day Itineraries Next >> Cancel

What is a Travel Expense Report? (Cont.)

If the itinerary exists, select it from the “Available Itineraries” section, then select “Import.”

Travel Allowances For Report: 24/09/03-06 Sonoma P2P

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: 24/09/03-06 Sonoma P2P Selection: _____

[Add Stop](#) [Delete Rows](#) [Import Itinerary](#)

<input type="checkbox"/>	Departure City↑	Arrival City	Arrival Rate Location
<input checked="" type="checkbox"/>	🔒 Santa Ana, California	Santa Rosa, California	SONOMA COUNTY, US-C...
<input type="checkbox"/>	🔒 Santa Rosa, California	Santa Ana, California	ORANGE COUNTY, US-C...

View Itinerary Stop

Departure City: Santa Ana, California

Date: _____ Time: 12:57 PM

Arrival City: Santa Rosa, California

Date: _____ Time: 02:36 PM

[Save](#)

[Go to Single Day Itineraries](#) [Next >>](#) [Cancel](#)

What is a Travel Expense Report? (Cont.)

Once New Itinerary stop fields are filled out, select “Save”

If travel was booked outside Concur (Certify), add New Itinerary Stops for every location where the traveler went and spent the night. No need to add a stop for a layover unless it is overnight. All fields are required.

Select “Add Stop” as needed.

The screenshot displays the 'Travel Allowances For Report' interface. At the top, there are four tabs: 'Create New Itinerary', 'Available Itineraries', 'Expenses & Adjustments', and 'Reimbursable Allowances Summary'. Below the tabs is the 'Itinerary Info' section, which includes an 'Itinerary Name' text field and a 'Selection' dropdown menu. A table below this section is currently empty, with the text 'No Itinerary Rows Found' displayed. The table has columns for 'Departure City', 'Arrival City', and 'Arrival Rate Location'. To the right of the table is the 'New Itinerary Stop' section, which includes a 'Departure City' text field, a 'Date' text field with a calendar icon, and a 'Time' text field. The 'Add Stop' button is highlighted with a red border.

What is a Travel Expense Report? (Cont.)

Once all overnight destinations are reflected in your itinerary then select “Next”.

Travel Allowances For Report: 24/09/03-06 Sonoma P2P

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: 24/09/03-06 Sonoma P2P Selection: [blurred]

[Add Stop](#) [Delete Rows](#) [Import Itinerary](#)

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input checked="" type="checkbox"/>	Santa Ana, California	Santa Rosa, California	SONOMA COUNTY, US-C...
<input type="checkbox"/>	Santa Rosa, California	Santa Ana, California	ORANGE COUNTY, US-C...

View Itinerary Stop

Departure City: Santa Ana, California

Date: [blurred] Time: 12:57 PM

Arrival City: Santa Rosa, California

Date: [blurred] Time: 02:36 PM

Validate all overnight destinations are reflected in your itinerary, then select

[Save](#)

[Go to Single Day Itineraries](#) [Next >>](#) [Cancel](#)

What is a Travel Expense Report? (Cont.)

A row for each day displays to select more details. To exclude an entire day as personal, select checkbox to left.

Meal per diem rates will be reduced to 75% for first/last day. Travel days in between will reflect full per diem rate per meal.

Select checkbox below Breakfast, Lunch, and/or Dinner if the meal was provided. These selected meals will be deducted.

Allowance totals for the day are listed in the right column. When finished select "Create Expenses."

The screenshot shows a web interface for "Travel Allowances For Report". It has three tabs: "1 Create New Itinerary", "2 Available Itineraries", and "3 Expenses & Adjustments". Below the tabs is a date range selector with "Show dates from" and "to" fields, a "Go" button, and an "Exclude All" checkbox. The main area is a table with columns: "Exclude", "Date/Location", "Meals Rate", "Breakfast Provided", "Lunch Provided", "Dinner Provided", and "Allowance". There are four rows of data, all for "Santa Rosa, California". The first row has a rate of \$55.50 and no meals. The second and third rows have a rate of \$74.00 and have checkboxes for Breakfast and Lunch checked. The fourth row has a rate of \$55.50 and has checkboxes for Breakfast and Lunch checked. Red arrows point from explanatory text to the "Exclude" checkbox, the \$55.50 rate, the checked meal checkboxes, and the \$20.50 allowance.

Exclude	Date/Location	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	Santa Rosa, California	\$55.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.50
<input type="checkbox"/>	Santa Rosa, California	\$74.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$39.00
<input type="checkbox"/>	Santa Rosa, California	\$74.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$39.00
<input type="checkbox"/>	Santa Rosa, California	\$55.50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$20.50

To exclude an entire day as personal, select the checkbox.

Meal rates will reflect full per diem or the first/last day rate.

Select the checkbox when a meal is provided.

If the checkbox is selected, meals will be deducted from the allowance the traveler receives.

<< Previous Create Expenses Cancel

Travel Request (TR) & Travel Expense (TE) Approval Process

1. TRs and TEs are electronically routed within Concur to the following approvers:
 - 1) Budget approver (COA) per Delegation of Authority (**DOA**); and
 - 2) Initiator's "reports to" supervisor per **CHRS**
2. Approvers may return request to a sender, but they cannot modify it
3. Approvers may add approvers, but they must first approve the request
4. Approvers have 10 to respond
5. If the Budget (COA) does not respond within 10 days, it skips to the "Reports to" supervisor
6. If the "Reports to" supervisor does not respond within 10 days, it skips up the organizational chain every 10 days until it goes all the way up to the campus President
7. Additional pre-authorizations should be captured as attachments to the Travel Request & Travel Expense
8. Contact Travel@csuci.edu with questions



Concur Profiles → Important & Required Updates for Travelers

YOUR INFORMATION

Personal Information

Name **Required**

1. First and Last Name will be populated from your University HR record. Please verify that all components are correct and match your government issued ID.

Note: If name information is incorrect contact Human Resources to update your official record.

Contact Information **Required**

1. Enter a work and/or home phone number
2. Add Your Mobile Device **Required**
Registering your mobile device will allow you to receive text messages from Concur informing you of any cancelled or delayed airline flights in addition to informing you of potential risks in your travel area.
 - a) Select the correct country code from the dropdown
 - b) Enter your mobile number
 - c) Click **Save**

Verify Your Email Address **IMPORTANT!**

Your "@csuci.edu" email address has already been populated in your profile. Verifying your email address allows you to:

- Email your receipts to receipts@concur.com
- Forward travel plans to plans@tripit.com

Only works if you have TripIt account.

1. Click the "**Verify**" link
2. A code will be sent from Concur to your @csuci.edu email address, copy the code from the email message
3. Return to your profile, paste the code you received into the **Enter Code** box, then click **OK**

The image shows two screenshots from the Concur system. The top screenshot, titled "Concur Profile Navigation", shows a user profile menu with a question mark icon (1), a user profile icon (1), a "Profile Settings" option (2), and a "Sign Out" option. The bottom screenshot, titled "Profile Options", shows a selection screen for customizing the user profile. It lists four options: "Personal Information" (highlighted with a green box), "Company Information", "System Settings", and "Contact Information" (highlighted with a green box). Arrows from the text blocks on the left point to these specific options in the screenshots.

Concur Profile Navigation

1 ? 1

Profile Settings 2

Sign Out

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information
Your company name and business address or your remote location address.
- System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**
How can we contact you about your travel arrangements?

Concur Profiles → Assign Delegates for TR & TE Prep.

“Request Delegates” or “Expense Delegates” is where the traveler can grant their travel coordinators permission to assist with initiating/preparing **Travel Requests** and **Travel Expense Reports**. Traveler must still review and submit both.

The screenshot shows the 'Delegates' management page. At the top, there are tabs for 'Delegates' and 'Delegate For', and buttons for 'Add', 'Save', and 'Delete'. Below this is a descriptive text: '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.' A table below lists delegates with columns for 'Name', 'Can Prepare', 'Can View Receipts', 'Can Use Reporting', and 'Receives Emails'. One delegate is listed with 'Can Prepare', 'Can View Receipts', and 'Receives Emails' checked.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	[Redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Search by delegates name and then select the permission check boxes that apply.

The screenshot shows the 'Concur Profile Navigation' menu. It includes a user profile section with a question mark icon and a user icon (labeled '1'). Below this is a 'Profile Settings' option (labeled '2') and a 'Sign Out' option. The main navigation area shows 'SAP Concur Profile' with a dropdown arrow. Under 'Profile', there are two tabs: 'Profile' and 'Personal Information'. Under 'Personal Information', there are two main sections: 'Request Settings' and 'Expense Settings'. Under 'Request Settings', there are links for 'Request Information', 'Request Delegates' (highlighted with a green box and labeled '3'), 'Request Preferences', 'Request Approvers', and 'Favorite Attendees'. Under 'Expense Settings', there are links for 'Expense Information', 'Expense Delegates' (highlighted with a green box), 'Expense Preferences', and 'Expense Approvers'. Arrows point from the '3' label to both 'Request Delegates' and 'Expense Delegates'.

Concur Profiles → Assign Assistant for Booking Travel

“Assistant” or “Travel Arranger” is where the traveler can grant their travel coordinators permission to assist with **Booking Travel**.

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

You currently have no assistants defined.

[Add an Assistant](#)

[Save](#)

- Search by delegates name and then select the permission check boxes that apply.

Add an Assistant

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

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

[Save](#) [Cancel](#)

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Concur Profiles → Assign Assistant for Booking Travel

“Assistant” or “Travel Arranger” is where the traveler can grant their travel coordinators permission to assist with **Booking Travel**.

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

You currently have no assistants defined.

[Add an Assistant](#)

[Save](#)

- Search by delegates name and then select the permission check boxes that apply.

Add an Assistant

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

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

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How to Coordinate Group Travel

1. Complete a Travel Request in Concur
2. Email 2 completed forms to Christopherson Business Travel (CBT). Include Request ID
3. Work with CBT to book the travel



Thank you!

Questions?

