



Concur Request & Approval Process Overview



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Spring 2025

Today's Objectives

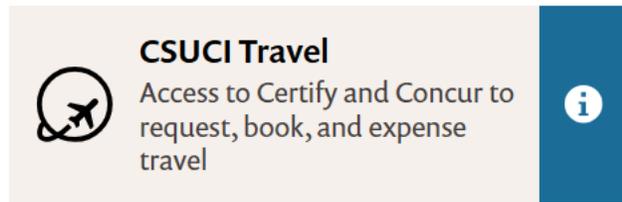
1. How to Access Concur
2. Understand Concur Roles & Responsibilities



How to Access Concur

All active employees (Faculty, Staff, & Administrators) have been provisioned with a Concur account.

Those with access can login via myCI using the CSUCI Travel Tile. Landing page, you see pictured here is temporary for our staggered rollout.



Auxiliary employee, student workers, and volunteers are not provisioned with Concur account of their own. It is necessary for them to work with employees to complete their travel requests, travel booking, and travel expense reports. Non-employees who travel on business are also expected to acknowledge in writing their travel request and expense.

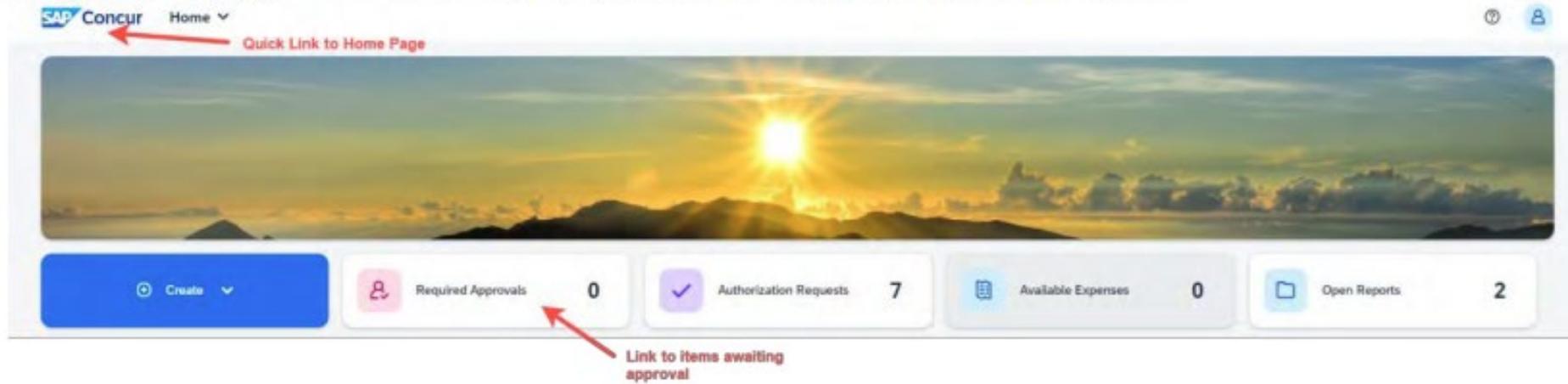
CSUCI Travel Application Page

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.

	Use Cases
Concur	<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>
Certify	<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>

How to Access Concur

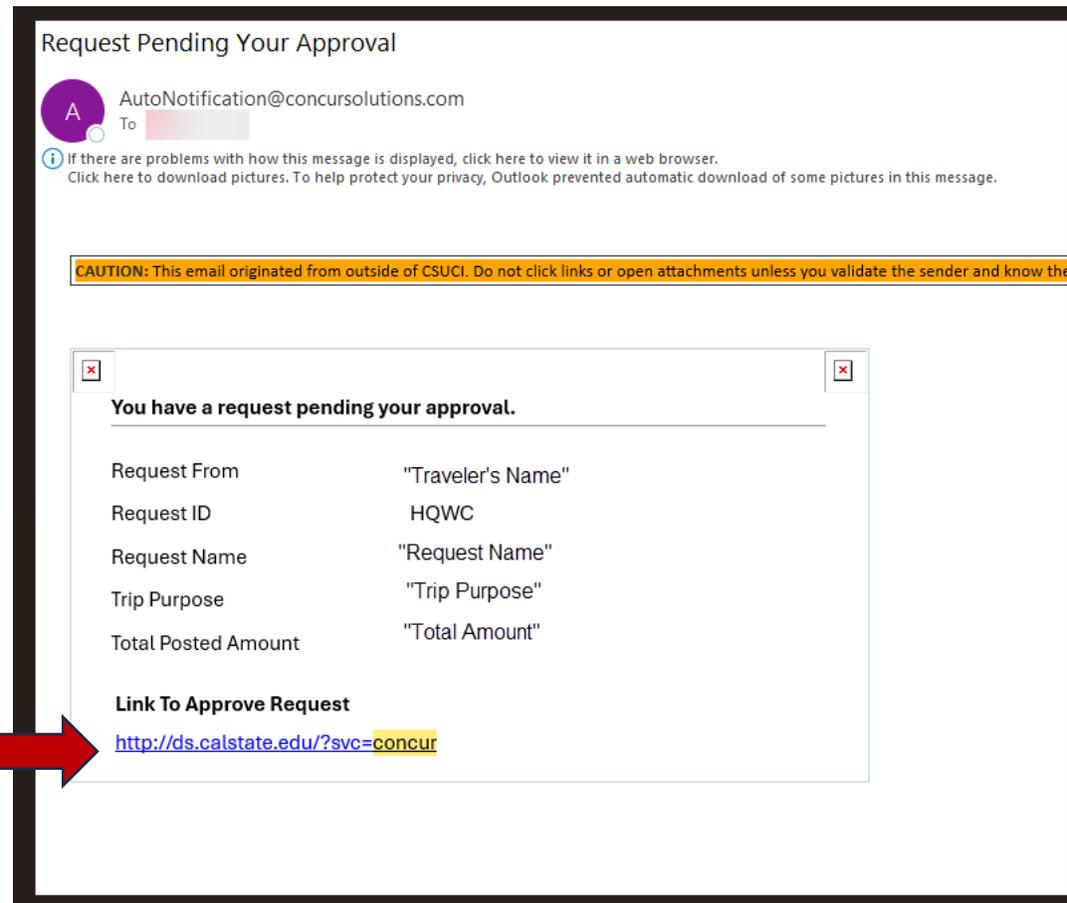
On the home page, in the Quick Task Bar, select the **“Required Approvals”** option.



How to Access Concur

Assigned approvers may also access Concur using the link they receive via email when a Travel Request (TR) or Travel Expense (TE) Report is submitted. Example pictured below.

Approvers are defined by the DOA Module and by CHRS.



The screenshot shows an email titled "Request Pending Your Approval" from AutoNotification@concurolutions.com. It includes a warning banner: "CAUTION: This email originated from outside of CSUCI. Do not click links or open attachments unless you validate the sender and know the sender." Below this is a pop-up window with the following details:

You have a request pending your approval.	
Request From	"Traveler's Name"
Request ID	HQWC
Request Name	"Request Name"
Trip Purpose	"Trip Purpose"
Total Posted Amount	"Total Amount"
Link To Approve Request	
http://ds.calstate.edu/?svc=concur	

A red arrow points to the "Link To Approve Request" section.



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Big Changes → New Roles & Responsibilities → Plan Ahead



- eTravel system and travel reimbursement process is changing
 - Concur should only be used for business travel
 - All business travel should be processed through Concur.
 - **Travel Request process is more formalized & requires approvals**
- eTravel system and its processes are being rollout to campus by division. Goal is to have all 5 divisions using the system before end of fiscal year (June 2025).
- Travel webpage is updated to include information about Concur
 - Training materials available too

Role	Responsibility
Traveler	<ol style="list-style-type: none"> 1. Follow the latest CSU Travel Policy. 2. May prepare their own TR and/or TE and Submit them when ready for approval. 3. When TR has been approved, they may book their own travel. 4. When working with a Travel Coordinator, ensure Travel Coordinator is delegate in their Concur Profile* 5. When working with a Travel Coordinator, ensure Travel Coordinator is assistant in their Concur Profile* 6. Ensure full name in Concur Profile. 7. Ensure mobile/cell phone is added to Concur Profile* 8. Ensure email is correct under Concur Profile*
Travel Coordinator	<ol style="list-style-type: none"> 1. Follow the latest CSU Travel Policy. 2. Ensure proper TR/TE delegation has been setup in delegator's Concur Profile.* 3. Ensure that proper Assistant permissions have been setup in delegator's Concur Profile.* 4. When requested, prepare TR and/or TE. Once complete ask Traveler to review & Submit. 5. When TR has been approved, book travel on behalf of the Traveler.
Budget Approver (Cost Object Approver)	<ol style="list-style-type: none"> 1. Follow the latest CSU Travel Policy. 2. Respond to emails received from AutoNotification@concursolutions.com <i>Be sure to check your "Other" Inbox.</i> 3. If a TR or TE does not look correct do not approve it. Send it back for correction. <i>Be sure to check for additional pre-authorizations attached.</i> 4. If you think you received a request/report in error, review your latest DOA form. Correct it if needed. 5. You may approve the TR/TE and manually add another more appropriate approver. <i>This applies to only this one TR or TE.</i> 6. When planning to be out of office assign TR/TE delegate to approve under Concur Profile. <i>Delegate must have a DOA on file.</i> 7. <i>Failure to respond within 10 days will skip your approval and route the TR or TE to the Reports to Supervisor.</i>
Reports to Supervisor	<ol style="list-style-type: none"> 1. Follow the latest CSU Travel Policy. 2. Respond to emails received from AutoNotification@concursolutions.com <i>Be sure to check your "Other" Inbox.</i> 3. If a TR or TE does not look correct do not approve it. Send it back for correction. <i>Be sure to check for additional pre-authorizations attached.</i> 4. If you think you received a request/report in error, review your CHRS account. Work with HR if needed. 5. You may approve the TR/TE and manually add another more appropriate approver. <i>This applies to only this one TR or TE.</i> 6. When planning to be out of office assign TR/TE delegate to approve under Concur Profile. <i>Delegate must have a DOA on file.</i> 7. <i>Failure to respond within 10 days will skip your approval and route the TR or TE to the Reports to Supervisor.</i>

Thank you!

Questions?

