Concur Profile and Delegate Information Power Point Information can be found at travel.csusb.edu

- What is a delegate and how to add one in user profile under expense or request delegates.
- How to add a Travel assistant/arranger in your profile under travel setting.
- Verify email so receipts can be emailed to your Concur available receipts section from your mobile device. Email to receipts@concur.com.
- Enable e-receipts.
- Email settings (approvers). Found under systems settings in your profile.
- Trip it Pro for frequent travelers – Click on APP on the black header ribbon for more info.
- If reservations are made outside of Concur, the traveler may email air, hotel or car itinerary to plans@concur.com and it will appear in the available expenses area under Expense.

Travel Request – Detailed Power Point can be found at travel.csusb.edu under Concur tab

- Click on Requests on the black ribbon header and then click on "New Request" tab.
- Enter travel request details on request header.
- Enter estimated expenses under the small blue "segments" and/or "expenses" tabs.
- Save each entry and when finished click on "submit request".
- Follow the approval workflow established by your division/department.
- Click on "submit request" again and you will receive a message that your request was submitted.
- An email goes to the first approver in your approval flow telling that person there is a request that needs attention. The request is fully approved after all approvals in the workflow have been done. A user may see at any time where the request is by clicking on the "Audit Trail" tab in the request.

Travel Booking - Power Point can be found at travel.csusb.edu under Concur tab

- Click on Travel on the black ribbon header and then choose from hotel, air, rail or car rental to begin.
- When reserving an airline ticket through Concur online or with an agent the cost of the ticket is direct billed to the university. You will need your approved Request number that is found at the top of your request and your department chart field string when reserving air reservations. You will need to enter a personal credit card into your profile to secure hotel and/or car rental reservations.
- Click on the appropriate icon to search for travel choices.
- Choose the flight or hotel or rental car and proceed through the panels until the process is complete. The receipt will appear in your available expenses to include in your expense report.

Expense Report - Detailed Power Point can be found at travel.csusb.edu under Concur tab

- Click on Request and navigate to Active Requests. Choose the correct approved request and click on the little blue expense on the far right side of the request. You can then begin to build your Expense Report from the approved Travel Request. (AFTER you have opened the Expense Report you can access it from the Expense tab on the top of the page.)
- All your header information remains the same as in the Travel Request except for the starting and ending time of the trip. If you are submitting a monthly mileage report, use the average time of day your trip starts and ends as this is the only place you will be entering the time. Click on next at the bottom of the page to begin entering your daily expenses.
- Click on the red New Expense to add a new expense, you will then begin typing the expense type in the white box OR you can find the expense type in the list and click on it.
- After clicking on the expense type, the box on the right will open and you will insert the specific expense information. Only the fields with the red lines are required. After you have saved the expense, it will appear on the left side. When you have entered all your expenses you are ready to submit your report.
- Click on the red Submit Report at the top of the page and the approval flow will appear. Please confirm the approvers are correct OR if you need to enter a Budget Approval name or user-add an approver do so at this time. When finished click the blue Submit Report and follow the screens.
- This expense report will be shown in a box at the top of the page when you click on Expense that is located on the black ribbon header. The user can see where the report is as there is a message in the box. The user can also click into the expense report, click on details and look at the audit trail to follow the approval progress.