Step-by-Step Guide
Request and Expense Settings Concur Travel & Expense System

Under Profile Settings, use the left toolbar to access Request and Expense Settings.

Request and Expense Settings, Required Fields:

1. **Request/Expense Information**: Click Request Settings to the left. Verify this information and updated if needed. This information is your default funding that will populate in your Request Header.

2. **Request/Expense Delegates**.

   Delegates Tab:

   You can change what your delegate can do and see on your behalf, add or delete delegates, and assign temporary approval delegate.

   **Delegate Permissions**: Assign the permissions you wish to give your delegates

   *CNSM recommends you give delegate permissions as Can Prepare, Can Book Travel, Can Review Receipts, Receives Emails, and Receives Approval Emails. Optional Can Submit Requests*

   a. **Can Prepare**-Allows the delegate to prepare Requests and Expense reports on your behalf. You will still be required to submit the expense report

   b. **Can Book Travel**-Allows the delegate to book travel on your behalf. Delegates receive all the same emails as the traveler, regardless of who books

   c. **Can Submit Reports**-Submitting an expense report is the responsibility of the employee who incurred the expense. The traveler must still approve and submit.
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d. **Can Submit Requests**: Allows the delegate to submit requests on your behalf.
e. **Can View Receipts**: Should check by default when selecting Can Prepare. This allows the delegate to view your receipt store, e-receipts, receipts images, etc.
f. **Can Use Reporting**: If you have any reporting rights (typically restricted to department heads) this option enables user to access reporting on your behalf.
g. **Receives Emails**: The delegate will be copied on all emails generated by Concur addressed to you.
h. **Can Approve**: Allows the delegate the ability to approve reports (peer or above)
i. **Can Approve Temporary**: This is a date range. Gives the delegate temporary access to approve requests and reports on your behalf. Should be someone at your level or above.
j. **Can Preview for Approver**: Delegates may preview, but not approve.
k. **Receives Approval Emails**: The delegate will be copied on all emails generated by Concur notifying you of requests and reports pending approval.
l. **Click Save**

Once you have saved, the next time your delegate logs into Concur, they will be able to perform the functions you have given them.

Delegate For Tab:

![Delegate For Tab]

You will see a listing of those who have made you a delegate on their behalf.

3. **Request/Expense Preferences**

Choose when to receive email reminders, prompts and how your wizard displays.

- **The status of an expense report changes**: An email is when the status of a submitted expense report has changed, such as from filed to Approved or Paid.
- **New company card transactions arrive**: An email is sent when new company card transactions are imported.
- **Faxed receipts are successfully received**: An email is when new faxed receipts have been received by Concur's imaging service.
- **An expense report is submitted for approval**: An authorized approver is sent an email when a traveler submits an expense report for the approver to approve.

Prompts:

- **For an approver when an expense report is submitted**: When you submit an expense report, you are prompted to select an approver. If you have a default approver, that person’s name appears automatically but you can select another approver if desired.

Display

- **Make the Single Day Itineraries page my default in the Travel Allowance wizard**: If selected, the Single Day Itineraries page displays by default instead of the Create New Itinerary (for standard itineraries) page.
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4. Request/Expense Approvers
   a. Default Approver should populate your supervisor – you should not override this box
   b. Default Approver 2 CNSM Fiscal Approver Review

When traveling on CNSM funds you will need to set up a Default approver 2. Please enter Laycie Schnekenburger as a Default approver 2 for Request and Expense.

You can type the name, id or email address, then select the appropriate individual.

5. Favorite Attendees: The attendee functionality in Concur is used to enter attendees (i.e. students, visiting professionals, group travel etc.) who attend business events and are tied to an expense, such as group lodging and group per diem expenses.

   • On the Attendees tab, click New Attendee
   • Add Attendee window appears
   • Select the appropriate type from the Attendee Type list
   • The page refreshes with the fields appropriate for the selected attendee type
   • Complete the remaining required fields and other optional fields, as desired
   • Save

Enabling E-Receipts: E-receipts are an electronic version of receipt data that can be sent directly to your Concur available receipts in Expense. The availability and content of e-receipts vary depending on the vendor

   a. E-Receipt Activation is located on the Profile Options (center right) or in Other Settings section of the left side menu.

   b. Click the E-Receipt Activation link and click here to activate. The E-receipt Activation and Use Agreement appears.

   c. Click I Accept. The e-receipts confirmation appears.
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**Connected Apps:** Tripit Mobile App is downloaded from the App Store. Tripit is a travel organizing app that automatically creates a master itinerary for every trip so you can access your travel plans, anytime, on any device.

a. Click Connect to Tripit and follow the instructions
   i. *If you are not currently using Tripit you will need to create a Tripit account to link to your Concur Profile.*

**Concur Mobile App:** Manage your expense and business travel on your mobile device

**Concur Mobile Registration** is located on the Profile Options (center left) or in Other Settings section of the left side menu.

Complete the Concur Mobile registration, create a Mobile PIN. Login to the App on your device using your @alaska.edu email and your four-digit Mobile Pin created above. Visit the training library for help with Concur Mobile to learn more about using the application on iPhone, Android, BlackBerry, and Windows Phone.