

FRESNO STATE

Discovery. Diversity. Distinction.



Profile and Delegate

Sign in to your portal at my.fresnostate.edu and select Concur Travel

MY FRESNO STATE

Navigation and menu items:

- Favorites | Main Menu
- My Page | Workflow
- PersonalizeContentLayout
- My Menu
 - Employee Self Service
 - Student Self Service
 - HR Transactions
 - eRecruit
 - Reports Portfolio
 - Forms Portfolio
 - Security Requests
 - Reporting Tools
 - People Tools
 - Lynda.com
 - Blackboard
 - HireTopDogs
 - Student Clubs & Organizations
 - Bizflow Workflow
 - GradesFirst-Academics
 - Access Google Apps/Mail
 - Access Zimbra/Mail
 - Concur Travel**
 - Kroll Ready
 - My System Profile
 - Change My Password
- Campus Links
 - Campus Directory
 - Campus Calendars
 - Campus Maps

Right-hand side content:

- My Messaging Center
 - No Unread Messages
 - [View All Messages](#)
- My Announcements
 - No articles currently available
 - Feed
 - [View All Articles and Sections](#)
- Money Matters
 - No articles currently available
 - Feed
 - [View All Articles and Sections](#)
- Continuing & Global Education
 - No articles currently available
 - Feed
 - [View All Articles and Sections](#)

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The dashboard has important information for your reference

The screenshot shows the Concur dashboard interface. At the top, there are navigation tabs for Requests, Travel, Expense, and App Center. A user profile is visible in the top right corner. Below the navigation, there are several key metrics: Start a Request, Start a Report, Upload Receipts, Authorization Requests, Available Expenses, and Open Reports. The main content area is divided into several sections: TRIP SEARCH (with a Mixed Flight/Train Search form), ALERTS (with a TripIt integration notice and a sign-up prompt), COMPANY NOTES (with links to authorization and travel alert information), and MY TASKS (with three cards for Open Requests, Available Expenses, and Open Reports). A red box highlights the Alerts, Company Notes, and My Tasks sections.

The dashboard provides links under "Travel Alert Information" and "High Hazard" for important information about international travel

The screenshot shows the U.S. Passports & International Travel website. The page features a navigation bar with various links and a search bar. The main content area is titled "Alerts and Warnings" and includes sections for "Travel Warnings" and "Travel Alerts". A red box highlights the "Travel Alerts" section, which includes a "Learn About Your Destination" search box and an "Enroll in STEP" button. The "Enroll in STEP" button is highlighted with a red box.

Set up your profile settings to get started

The screenshot shows the Concur home page. At the top, there is a navigation bar with 'CONCUR' and links for 'Requests', 'Travel', 'Expense', and 'App Center'. A 'Profile' dropdown menu is highlighted with a red box. Below the navigation bar, there is a 'Hello,' greeting and a row of statistics: 'Start a Request', 'Start a Report', 'Upload Receipts', 'Authorization Requests', 'Available Expenses', and 'Open Reports'. The main content area is divided into sections: 'TRIP SEARCH' with a 'Mixed Flight/Train Search' form, 'ALERTS' with two notifications, 'COMPANY NOTES' with several links, and 'MY TASKS' with three cards for 'Open Requests', 'Available Expenses', and 'Open Reports'. A blue callout box at the top left says 'Set up your profile settings to get started' with an arrow pointing to the Profile dropdown.

Start with your personal information

The screenshot shows the 'My Profile - Personal Information' page. A blue callout box at the top left says 'Start with your personal information' with an arrow pointing to the 'Personal Information' tab. The page has a navigation bar with 'CONCUR' and links for 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. Below the navigation bar, there is a 'Profile' dropdown menu. The main content area is divided into sections: 'Your Information' with a list of links, 'My Profile - Personal Information' with a 'Jump To' dropdown and a 'Choose' button, an 'Important Note' about name and airport security, and a form for 'Personal Information' with fields for 'Title', 'First Name', 'Middle Name [Required]', 'Nickname', 'Last Name', and 'Suffix'. There is also a 'Company Information' section with an 'Employee ID' field and a 'Go to top' button.

All Required** fields must be completed

Contact Information Go to top

Work Phone[Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone[Required**]			
<input type="text"/>			
Pager	Other Phone		
<input type="text"/>	<input type="text"/>		
Mobile Phone			
<input type="text"/>			

****You must specify either a home phone or a work phone.**

Customize your email notifications in System Settings

Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees

Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees

Other Settings
E-Receipt Activation
System Settings
Connected Apps

Time zone (local time) (UTC-08:00) Pacific Time (US & Canada)

Email Notifications

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails ?
- Send Trip-on-Hold Reminder Emails ?
- Send Ticketed Travel Reminder Email ?
- Send Cancellation Emails ?

Establish your expense delegate by clicking here

- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- Expense Settings**
 - Expense Information
 - Expense Delegates
 - Expense Preferences
 - Expense Approvers
 - Favorite Attendees
- Other Settings
 - E-Receipt Activation

Select the options that you want to receive prompts for. Prompts are pages such as Submit or I am on my way. **Change Password** Change your password.

Add your delegate and assign their permissions

CONCUR | Requests | Travel | Expense | Approvals | App Center | Support | Help | Profile

Profile | Personal Information | Change Password | System Settings | Mobile Registration | Travel Vacation Reassignment

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

Expense Delegates

Delegates | Delegate 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	Receives Emails	Can Approve	Receives Approval Emails
<input type="checkbox"/>	Test Admin, Test Admin adminitest@csufresno.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

New Definitions

Concur is a travel and expense reporting system

Travel Claim is now an Expense Report

Travel Application is now a Travel Request

Travel Approver is the Manager/Supervisor/Chair who typically approves your travel

Budget Approver is now called Cost Object Approver (COA). This is the individual authorized to approve the use of department funds also called a budget analyst

A Delegate can create and (or) view travel requests or expense reports on behalf of another employee. The person who creates the delegate relationship determines your rights and privileges (create, view reports, receive emails) as a delegate

Things to Note

Verify your Fresno State email in your profile so you can email your receipts to receipts@concur.com

Be sure to click on the E-Receipt Activation to ensure vendors can send receipts

Keep paper receipts until reimbursement for travel expenses have been received

Travel Approver has 7 business days to approve; after 7 days, it is automatically returned to the traveler to redirect for approval



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Need help?

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