

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 sections:

- 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](#)

Disclaimer
© Copyright 2016 California State
[Click here to email questions and comment](#)

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 two alert items), COMPANY NOTES (with links to various documents), and MY TASKS (with three task cards: 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 header includes the U.S. Department of State logo and navigation links. 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 description of what a Travel Alert is and a link to "Enroll in STEP".

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 menu items: 'Requests', 'Travel', 'Expense', and 'App Center'. On the right side of this bar, a 'Profile' dropdown menu is highlighted with a red box. Below the navigation bar, a 'Hello,' message is followed by several status cards: '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 informational messages; 'COMPANY NOTES' with links to various documents; and 'MY TASKS' with three cards showing '00 Open Requests', '00 Available Expenses', and '00 Open Reports'. A red arrow points from the 'Set up your profile settings to get started' text to the 'Profile' dropdown menu.

Start with your personal information

The screenshot shows the 'My Profile - Personal Information' page in Concur. A blue box at the top left contains the text 'Start with your personal information' with a red arrow pointing to the 'Profile' dropdown menu in the top right navigation bar. The page has a left sidebar with a list of settings categories: 'Your Information', 'Travel Settings', 'Request Settings', and 'Favorite Attendants'. The main content area is titled 'My Profile - Personal Information' and includes a 'Jump To' dropdown menu set to 'Personal Information'. Below this, there is a warning message: 'Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.' The form contains fields for 'Title', 'First Name', 'Middle Name [Required]', 'Nickname', 'Last Name', and 'Suffix'. The 'Middle Name' field is currently empty and has a 'No Middle Name' checkbox below it. A 'Change Picture' button and a user profile icon are on the right. At the bottom, there is 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...
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



Discovery. Diversity. Distinction.

Need help?

Marie Cuningham | (559) 278-2911 | mariec@csufresno.edu

Virginia Nevarez | (559) 278-2877 | vnevarez@csufresno.edu