Delegate/Travel Arranger

Concur allows you to delegate permissions to another employee so they can perform work on your behalf in Concur.

You can add an employee Delegate permissions for Request and Expense. Please note: Request and Expense share delegates.

If you would like the delegate to book travel in Concur on your behalf, you will also need to make them a Travel Arranger.

Delegate Traveler Permissions include:
✓ Prepare Requests and Expense Reports
✓ View Receipt Images
✓ Receive a copy of Concur Email Notification

Delegate Approver Permissions include:
✓ Approve, Approve Temporarily
✓ Preview Travel Requests/Expense Reports (approver role not required)
✓ Receive a copy of Concur Approval Email Notification
✓ Employee delegated Approver permissions must already have the approver role in Concur and must have the same or higher job classification as you in order to approve.

To add a Delegate:
Profile > Profile Settings > Request Delegates

To add a Travel Arranger:
Profile > Profile Settings > Assistants/Arrangers

Approval Workflow

All Travel Requests and Expense Reports will go through an automated workflow process once submitted.

Approvers will receive pending approval email notifications including the Concur link to log in to Concur and approve Travel Requests and Expense Reports.

Concur Approval Workflow:
First Route: “Reports to” Approver
Second Route: Budget Approver

Additional approvals for Travel Requests are also automated within the workflow depending on Travel Type and Travel Destination.

In addition to the required approvals, approvers can add an additional approver to the workflow by using the Approve & Forward option.

Approval Timeframe:
Each approver will have 6 calendar days to approve Travel Requests and 10 calendar days to approve Expense Reports.

Website: https://fiscaff.sfsu.edu/content/sf-state-travel-center

Email: concur@sfsu.edu

Concur Coordinator: Amanda Gazzo (415) 338-2908, amandag@sfsu.edu

SF State Concur Travel & Expense

Concur is a comprehensive web based tool that integrates travel request and expense reporting with a complete travel booking solution for higher education business travel.

Concur also provides a mobile app to manage travel and approvals on the go!

Concur will take the place of travel’s current manual paper process including an automated approval workflow process. There are 3 modules integrated within Concur:
✓ Request (Travel Request)
✓ Travel (Concur 'Travel')
✓ Expense (Expense Report)

Accessing Concur:
http://fiscaff.sfsu.edu/ > Travel Services

No need to create and remember a new user name and password!

Choose San Francisco Campus on the CSU Campus Login Page and continue to login using your SF State Credentials on the SF State Gateway (single sign-on).