



SAP Concur CONCUR QUICK GUIDE: MINIMUM STEPS FOR ALL TRAVELERS

GETTING STARTED

Use your regular campus credentials to log in under the Faculty and Staff tab of the CSUB homepage (look for the Concur link in the “More Faculty and Staff Links” section).

Some faculty and staff may have their departmental administrative staff make their travel reservations and process their travel paperwork (Travel Request and Expense Claim). If that is the case, those employees still need to do some things themselves:

In your Profile

1. **Verify that your legal name** as displayed matches your government-issued identification that you will be using when booking travel, and when traveling.
2. **Enter required fields**, including
 - a. Your middle name (if it's included on your government-issued identification)
 - b. Work/home phone
 - c. Gender
 - d. Birthdate
 - e. Set up your Travel Assistant(s)/Arranger(s)-employees who can book travel on your behalf, and
 - f. Set up Request/Expense delegate(s)-employees who can process your travel paperwork for you.
3. **Verify your work email address.**

Request and Expense Tabs

1. **Only you can submit your Travel Requests and Expense Claims.** You cannot delegate this action to anyone else.
2. Read the legal disclaimer before clicking the “submit” button.

3. If something needs to be changed on your Request or Expense, you alone have the option to **recall any Expense Reports** if needed.

Approvers

If you're an administrator, in addition to the items above:

1. If you want someone to review transactions before you see them, you need to add the employee as a “Delegate” and check the box “can preview for approver”.
2. Approvers can delegate someone else to approve for them, either ongoing or for a temporary date range (such as a vacation). **The person you delegate that authority to must already be an approver/MPP.**

For more details, see the complete Concur User Guide located on the Concur website:

<https://www.csub.edu/bas/paymentservices/Concur/index.html>

QUESTIONS?

1. Contact your department/school administrative support staff. If you can't get your question resolved,
2. Email accounts_payable@csub.edu and enter “Concur” in subject line and include screenshot(s) of your question/problem. Payment Services' travel staff is:

Felitas Alvarado	x2535	falvarado3@csub.edu
Sally Shaff	x6207	sshaff@csub.edu
Becky Lappin	x2531	blappin@csub.edu