



## Request & Expense Settings

**Purpose:** Request & Expense Settings is where a user sets up information such as accounting defaults and delegate access. Changes made in Request Settings carry over to Expense Settings (and vice-versa). If the user changes or makes updates to one section (Request Settings or Expense Settings), the other section will automatically be updated.

### Request Information

- A default departmental account number will automatically populate
- The “Eligible to access the Athletics Policy” field will be "No" for all but a very few non-Athletic-department travelers.
- The department and fund will be pre-populated with the traveler's home department, but can be changed.

### Request Delegates - Important!

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Masimore, Lynn lmasimore@fsu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare and submit travel requests, book travel, and prepare, but not submit, an expense report on behalf of the traveler.
- For the initial implementation of Concur Travel & Expense, Delegates will automatically be loaded from OMNI.
- Beyond the initial implementation of the system, **it is the responsibility of the traveler to add/delete Delegates.**

### To Add or Remove a Delegate (Someone who may enter or approve travel on your behalf):

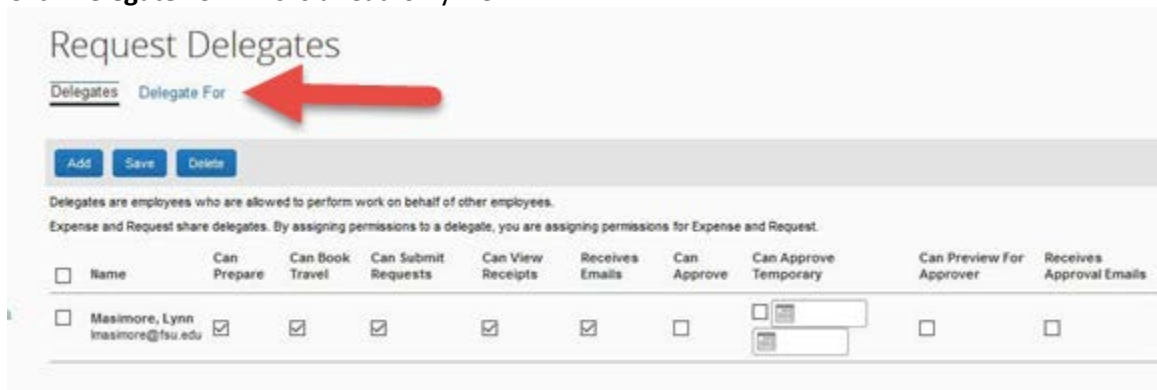
- Click Add.
- Search for the person you wish to add as a Delegate, and click Add.
- Check the boxes that correspond with the permissions you are granting to the delegate.  
**(\*Recommended permissions for Delegates acting as Travel Reps)**
  - **\*Can Prepare** – delegate has authority to prepare expense reports



- **\*Can Book Travel** – delegate has authority to book travel (select with Can Submit Requests)
  - **\*Can Submit Requests** – delegate has authority to submit travel requests
  - **\*Can View Receipts** – delegate can view electronic receipts that the traveler has sent to Concur. This will automatically get checked, when you select “Can Prepare”
  - Can Use Reporting – delegate can run reports
  - **\*Receives Emails** – delegate receives email notifications
  - Can Approve– this is typically used by an approver to delegate approval authority to someone else. Approval authority can be permanent or temporary.
  - Can Preview for Approver – this is typically used to add an additional level of review, for example, reviewing for proper account number assignment, before the final review. A Previewer cannot approve or reject a report.
  - Receives Approval Emails – Receives Email notifications as the expense report moves through the approval workflow
- Click **Save**.
  - To **delete a delegate** click the checkbox to select the person, click **Delete**, and confirm deletion.

### To See Who You are a Delegate For

Click **Delegate For**. This is a read-only view.



### Request Preferences

No changes necessary

### Request Approvers

A default approver will automatically display. Contact the FSU Travel office if it needs to be changed.

### Favorite Attendees

Optional

### Expense Settings

- Information, Delegates, Preferences, Approvers, and Favorite Attendees are shared between Request and Expense Settings
- Information that was entered (or edited) in Request Settings will carry through to the Expense Settings