



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.

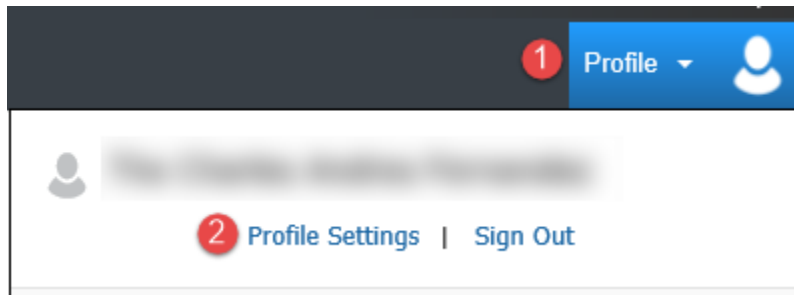
Request/Expense Delegates - Important!

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

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Daniels, Carla ccdaniels@admin.fsu.edu	<input checked="" type="checkbox"/>	<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"/>

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

1. Navigate to Profile
2. Profile Settings



3. Click on Request Delegates
4. Click Add.
5. Search for the person you wish to add as a Delegate, and click Add.
6. Check the boxes that correspond with the permissions you are granting to the delegate.

Recommended permissions for Delegates acting as Travel Delegates (*) or Approver Delegates (~)

- **(*) 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” or “Can Approve”
- **(*) Can Submit Reports** – delegate click submit button in order to check for audit rules, but traveler still must submit the report.
- **(*) 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

7. 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**.

Request 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 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"/>

To remove the ability to act as a delegate on behalf of another user

- Select the check box to the left of the individual(s) and click **Delete**
- **Important!** Once you remove yourself as a delegate you will need to communicate with that user to be added back as a Delegate in the future.

Delete

This employee may act as a delegate for the listed 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 Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 and vice versa.