

Concur Terminology	Description
Active Reports	Reports in the Expense Module that are considered active by Concur. Concur considers active reports to be ninety days or less even if the reports have a status of completed, approved, and paid.
Active Requests	Requests in the Request Module that are considered active by Concur. Concur considers active requests to be ninety days or less even if the requests have a status of completed, approved, and expensed.
Admin Approval	Approval/review by One-Stop Financial Services for a travel request
Alert	Indicates an exception, which is indicated by a yellow triangle, that does not prevent submission of the report. Serves as a reminder to double-check this exception before submitting the report.
Approval Change	Approval change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.
Approval Flow	The log of approvals for requests or travel expense reports.
Approved & In Accounting Review	Approval/review by One-Stop Financial Services for an expense report
Audit Trail	A record of all changes made to a request and/or expense report. There are two types of items that appear in the Audit Trail: actions at the report level (approvals) and actions at the entry-level (where changes are made).
Budget Approver	Fiscal Officer, which is based on Delegation of Authority (DOA) and Dept ID/Fund combination

Cost Object Approval	Approval by the Budget Approver
Dashboard	The dashboard is the main page of Concur which shows pending tasks, open reports, and upcoming trips
Delegate	Delegates are assigned by the traveler in their profile settings to allow another user to build requests and expense reports on their behalf. Refer to <i>Delegate Permissions</i> on page 4 for more details.
E-Receipts	E-receipts are electronic receipts that are automatically sent to Concur from participating suppliers. E-receipts will automatically match with the traveler's itinerary within a report if an expense report was created on a desktop prior to traveling.
Exception	An action, which is indicated by a red exclamation, that must be resolved before the traveler/delegate can submit the expense report.
Expense Report	An expense report details expenses that occurred while the traveler was traveling on behalf of Cal State LA. A traveler completes an expense report after the last day of the trip, which is then reviewed and approved prior to reimbursement.
Frequent Traveler Programs	Programs such as frequent flyer miles, hotel points, parking discounts, and car rental discount programs that travelers have registered for.
Mobile App	The Concur mobile app allows travelers to build itineraries, take pictures of receipts, stores receipts, and submit reports.
Payment Status Change	Payment status change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.

Previewer	An employee who can review (not approve) reports on behalf of an approver. This role must be assigned by the approver in his/her profile.
Request	A request is used to receive approval for an upcoming trip such as conferences, meetings, and out-of-state travel. It is used to estimate the cost of and upcoming trip, verify the funding/budget, and approval to travel and book travel if needed.
“Reports To” Approver	Appropriate Administrator, or direct supervisor according to HRM
Travel	The Concur Travel module is the CSU’s direct booking tool where users can access CSU-negotiated rates.
Travel Arranger	Travel Arrangers are assigned by the traveler within their profile to allow another user to book travel on their behalf.

Delegate Permission Option*	Description
Can Prepare	If selected, the delegate can create/view Travel Requests and Expense Reports on your behalf.
Can View Receipts	If selected, the delegate can view receipt images on your behalf.
Can Use Reporting	If selected, the delegate can run reports on your behalf. Please note: You must have Reporting access already in order to delegate to another employee. You can delegate up to two employees with this Reporting permission.
Receives Emails	If selected, the delegate receives a copy of all Concur Request/Expense related emails that you receive. Approval emails not included. This permission should be granted if delegating a preparer.
Can Approve	If selected, the delegate can approve Travel Requests and Expense Reports on your behalf, indefinitely.
Can Approve Temporary	If selected, the delegate can approve Travel Requests and Expense Reports on your behalf only during a specific period of time. By selecting this option, you will select a beginning and ending date.
Delegate can preview for approver	If selected, the delegate can preview Travel Requests and Expense Reports that are pending your approval on your behalf. A previewer does not have to have an approver role in Concur and will not have the ability to approve.
Receives Approval Emails	If selected, the delegate receives a copy of each request/expense report approval related email

***Important Notes:**

1. Approvers will have additional permissions to select. The option to delegate an approver is only available for employees who already have approver role in Concur.
2. In order to have a delegate view receipts, you need to check the **Can Prepare** box, once you check that box, the **Can View Receipts** box will automatically check.